



Solarize Rhode Island Municipal Request for Applications

August 27, 2015

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

I. Opportunity Summary

The Rhode Island Office of Energy Resources (OER), in conjunction with the Rhode Island Commerce Corporation (Commerce RI) and non-profit, SmartPower, Inc., is releasing this request for applications (RFA) to Rhode Island cities and towns (Communities) to demonstrate local interest and engagement in participating in the 2015 Fall Solarize Rhode Island Program (Solarize RI). This program will drive Community adoption of solar photovoltaic (PV) projects through a partnership focused on localized marketing and installation efforts, which in turn will help to drive down the installation cost of small-scale solar PV installations within the selected communities through a group purchasing model. The original pilot Solarize Rhode Island Program, has been a tremendous success, with three municipalities participating. Read the *North Smithfield Round 1 Pilot Overview* (posted on www.solarizeri.com) for more information on the fall 2014 Program, the results, and important lessons learned.

2 The OER, Commerce RI, and SmartPower, the Program Administrators, are conducting a new round of the Solarize RI program, which will involve program preparation in late summer 2015, with the main outreach campaign taking place in the fall of 2015. Please see Section 1.D. below for a corresponding timeline for this current round of the Solarize RI program. As part of the program, the Program Administrators will plan to select a minimum of five (5) communities (or groups of communities) to participate in the program.¹ Applications will be reviewed competitively, and communities that demonstrate that they have a clear and comprehensive outreach plan, a committed volunteer or volunteer team (solar ambassadors), residents interested in the program, and an engaged municipality, will be highly competitive.

If there is benefit to pooling resources or efforts, communities may form partnerships and respond to this RFA. Only one (1) partnership will be selected, if any group proposals are received for the fall 2015 program. A partnership is defined as at least two, but no more than three communities located adjacent to each other (i.e. they are contiguously located). Note that if communities respond to this RFA as a group, each Community will be responsible for demonstrating that it will meet the proposal requirements and evaluation criteria outlined below.

A. Program Overview and Goals

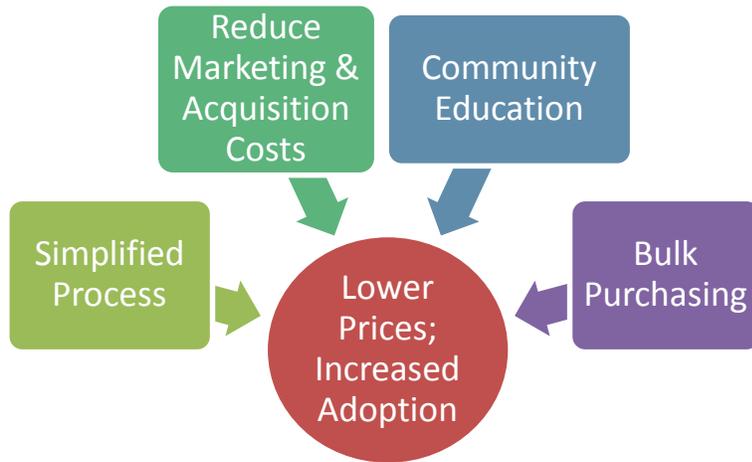
Program Description

The aggregation of multiple small-scale solar PV installations within a Community provides opportunities to realize economies of scale for the solar PV Installer(s), reduced customer acquisition costs, and ultimately cost savings for the customer. Installation prices for small-scale solar PV installations are generally higher than for large-scale installations, in part due to the extra cost of customer acquisition – including

¹ A community is not eligible to apply if it has already participated in a Solarize RI program.



marketing, advertising, and providing education to multiple customers. By educating and engaging the local Community, streamlining marketing efforts, and aggregating sales, the 2015 Solarize RI Program will help drive down the cost of PV projects to make them a more accessible and affordable energy option.



The Goals of the program include:

1. Increased education and awareness of solar PV
2. Reduce hard and soft costs associated with installing solar PV
3. Increase local adoption of solar PV

Figure 1: The goals of Solarize RI and the methods deployed

3

Through this RFA, the Program Administrators will competitively select a minimum of five (5) communities or groups of communities to participate in the 2015 Solarize RI program.² Each Community is required to designate a Municipal Representative who will collaborate together with the Program Administrators to organize Community meetings, help identify volunteers and delegate volunteer activities, and help manage outreach efforts. The Program Administrators will also help the selected communities (or group of communities) to procure a solar PV Installer or group of Installers for their Community that will provide competitive pricing for the solar PV installations. It is expected that customers participating in the program will save more as the total contracted capacity of solar PV within the Community increases. Small commercial projects are eligible for the Solarize program, however the contract for these projects must be signed during the course of the campaign in order to be counted towards the tier pricing.

The overall program goal is that marketing support from the Program Administrators, involvement of the Community in the customer acquisition process, and competitive, tiered pricing from the Installer(s) will form a three-way partnership that reduces costs and greatly accelerates the penetration of solar PV

² Only one (1) partnership will be selected, if any group proposals are received for the fall 2015 program.

in the Community. The [North Smithfield Round 1 Pilot Overview](#) describes the results of the first round of Solarize in Rhode Island and details the process, results, and lessons learned.³

To help accomplish the program goals, the Program Administrators will assist the Community and the selected Installer(s) to deploy an outreach and marketing strategy to enhance local interest in solar PV technology, as well as alleviate some of the marketing and acquisition costs associated with small scale solar PV installations. Each Community (even if participating as a group) will receive customized marketing materials, aid in implementing the proposed marketing plan, and resources for outreach to the Community. In addition, the Program Administrators will lead and host Solar Workshops in the Community where various stakeholders, including the selected Installer(s), will meet with residents to increase awareness of solar energy and its benefits. The general roles of each party are outlined in Figure 2 below:

4



Figure 2: Anticipated roles of different parties in Solarize Rhode Island

Starting around October 2015, interested customers in the selected Community will be able to contact the Installer(s) and sign up for a site assessment. There are several ways this can be done, including the Solarize RI website (www.solarizeri.com), at a solar workshop or outreach event, or by calling the

³<http://www.energy.ri.gov/documents/renewable/North%20Smithfield%20Round%201%20Pilot%20Overview%20Final%20Formatted%201.pdf>

Installer directly. Customers with sites that are deemed feasible for a solar PV project will have the option to contract with the Installer(s) before the program deadline. The contracted Installer will be the technical expert responsible for assessing individual sites, working with interested customers to design appropriate systems, and contracting with customers for installation of solar PV projects. The deadline for customers to sign up during the campaign is February 12, 2016.⁴ In addition, the Installer(s) are responsible for all customer service associated with customers who sign contracts. The installer(s) will be responsible for completing each PV installation within one year of application approval.⁵

Roles, Responsibilities and Time Commitments

This chart outlines the roles of the different parties under the Solarize RI Program:

	RIOER/Commerce RI/SmartPower	Community Outreach Team	Installer(s)
Procurement	Release RFP to select Installer(s) and determine if proposals meet threshold requirements; Work with communities to select Installer(s)	Work with Program Administrators to evaluate proposals and lead in the selection process	Submit competitive proposals for PV installations in communities
Reduce Cost to Customer	Make available solar incentives ⁶ ; 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 stream-lining the permitting process (if possible)	Provide competitive tiered pricing

5

⁴ The timeline is subject to change. See timeline below for more details on the timeline.

⁵ For REF applications, an award letter is provided to the Installer who submits. For REG applications, an interconnection application is submitted to National Grid.

⁶ Commerce RI makes no guarantee that all applications to the REF Small Scale Solar Program will receive a grant. OER makes no guarantee that any application to National Grid’s Small Scale REG Program will receive a tariff.



6

<p>Marketing</p>	<p>Provide Marketing and Education Toolkit to Community; Facilitate Community group outreach planning; attend and support key community events</p>	<p>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</p>	<p>Partner with community groups, Solar Ambassadors and other volunteers to disseminate information on Program (as appropriate)</p>
<p>Education</p>	<p>Educate community groups, Solar Ambassadors, and volunteers on solar PV basics; Facilitate local Solar presentations</p>	<p>Serve as point for questions of program mechanics and basic solar information; Utilize municipal communications vehicles or outreach and education</p>	<p>Serve as the technical expert on solar; Present at Solar Workshops</p>
<p>Communication</p>	<p>Provide a Solarize RI website with Community specific pages; Identify communications opportunities and story angles; Media/Social Media strategy and promotion</p>	<p>Assist in providing content for Solarize 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</p>	<p>Work with SmartPower, Solar Ambassador, and volunteers to support outreach; Will develop a portal to facilitate customer sign up</p>
<p>Solar Installations</p>	<p>Leverage communications opportunities from early solar installations (if possible)</p>	<p>Leverage outreach opportunities from early solar installations (if possible); Outline permitting process for solar PV projects in community</p>	<p>Provide site assessments, customer services, system design, and a turnkey installation to customers;</p>
<p>Program Administration</p>	<p>Facilitate bi-weekly check-in calls</p>	<p>Participate in bi-weekly check-in calls</p>	<p>Participate in bi-weekly check-in calls; Will provide weekly metrics to Program Administrators</p>



Eligible Community

In order for a Community (or a group of municipalities) to be eligible to submit an application to this RFA, the following requirements must be met:

- The Community cannot have previously participated in the Solarize Rhode Island Program.
- The Community must be serviced by an investor-owned utility (National Grid).
- The Community must submit a completed Authorized Applicant and Acceptance form (Attachment A), including a proposal on how to make Solarize Rhode Island a successful marketing and PV adoption campaign.
- The application must include a letter from the Community's Chief Executive Officer committing to the Community's full participation and cooperation with the Program Administrators in this program OR a passed Town Council Resolution to participate in the Program.⁷
- The Community must identify a municipal representative who will serve as the primary point of contact for the Program Administrators who will handle review of Installer proposals, coordination of solar workshops, and aid the Program Administrators in implementation of the marketing plan.
- The Community should identify two additional people who will participate on the External Review Team, in addition to the municipal representative, to assist with the solar installer selection process (or one person if the Municipality is applying as a group).

7

If Communities are applying together as a group, the following must be submitted with the application:

- Evidence of the partnering communities having worked together on previous projects. Provide a list of projects and project summaries that have been completed or are in progress.
- Each partnering communities must submit a letter, on letterhead, stating that they are committed to working with the other partners on the Solarize campaign.

Community Commitment to Solar PV

Communities can take several steps or actions to show commitment to participation in the Solarize campaign and increasing solar PV adoption in the community. The following is a list that will add one additional scoring point rewarding actions that the Community has done or commits to doing prior to during the Solarize campaign: (each worth 1 additional scoring point for a maximum of 5)

- The Community has an Energy or Sustainability Committee that has been meeting regularly
- Has a part a full-time or part-time Energy Manager on staff

⁷ The "Chief Executive Officer" is defined as the manager in any city having a manager and in any town having a city form of government, the mayor in any other city, and the board of Selectman in any other town unless some other officer or body is designated to perform the functions of a Chief Executive Officer under the provisions of a local charter or laws having the force of a charter



- Has on staff a Solarize, Sustainability or Energy intern who will be available to help with the campaign (or a letter on municipal letterhead stating a commitment to hire an intern for the duration of the Solarize campaign)
- Is a Rhode Island Public Energy Partnership community
- Has completed a comprehensive inventory of energy consumption in municipality-owned buildings
- It is highly recommended that the Community has identified two or three dedicated solar ambassadors to help the Program Administrators market the Solarize RI Program and provide outreach to the selected municipalities.
- Has adopted PV friendly zoning policies
- Uses an expedited application and permit process for renewable energy projects and/or commits to working with OER staff on a small scale (1kW-25kW) PV permit with a set fee structure⁸
- Has adopted property tax policies that promote solar PV adoption or commits to adopting property tax policies that promote solar PV adoption.⁹

B. Funding Availability

Funding for the Solarize RI program comes from Regional Greenhouse Gas Initiative (RGGI) dollars. As part of this program, OER has contracted with SmartPower to help market the program and assist municipalities with their marketing efforts. It is expected the 2015 RGGI funding will be available for this program. However, the Solarize RI program is subject to the funding approval.

C. Timeline

A proposed timeline for the RFA process and fall 2015 Solarize campaign is outlined below. Please note that this is an estimated timeline and dates may be subject to change.

2015 Solarize Rhode Island Schedule	Tentative Timeline
RFA for Communities: Released	8/27/2015
OER to post Community RFA FAQ	9/1/2015
RFP for Solar Installers: Released	9/3/2015
RFA for Communities: Due	9/22/2015
Interviews with Communities that submitted proposals	Late September 2015 (anticipated)
Announce Selected Communities	Late September 2015 (anticipated)

⁸ All PV systems in Rhode Island are required to have a building and electrical permit. The PV permit would be a new permit for both electrical and building with a set fee.

⁹ For examples of solar PV property tax exemption language adopted in some RI municipalities, please contact Shauna Beland, shauna.beland@energy.ri.gov



RFP for Solar Installers: Due	10 business days after Communities are
Community-Installer Interview Day (see section D below)	Mid October 2015
Announce Selected Solar PV Installers	Mid October 2015
Outreach Strategy Development with Installer	Mid October 2015
Customer Sign-Up Period Begins	10/19/2015
Customer Sign-Up Period Ends	2/15/2015
Deadline for Installations	1 year after project approval

D. Community Interview

As part of the Community selection process, the Program Administrators will conduct a phone interview with the prospective Community (or groups of Communities). Representatives from the Community involved in the interview will need to include the proposed primary point of contact and one or two of the identified solar ambassadors, intern, or staff member (if identified). Additional Community volunteers are welcome to participate, but are not required. The Program Administrators may ask questions clarifying the staff and/or volunteer structure, the proposed marketing and outreach plan, and overall Community interest and capacity in hosting a Solarize RI program.

E. Installer(s) Selection Process and Interview

9

As part of the Installer selection process, selected Communities will appoint an External Review team to review installer proposals that have met threshold requirements. The External Review team will be made up of three (3) Community members that include the primary point of contact identified in the application. For Communities that are applying as a group, the External Review team will consist of no less than two (2) Community members that include the primary point of contact for each Community identified in the application. In addition, each of the Program Administrators will have one (1) member on the External Review team reading the Installer Proposals. OER will provide scoring sheets to all External Review team members along with copies of the Installer proposals.

The Program Administrators will receive the Installer proposals (on behalf of the Communities) ten (10) business days after the selected Communities are announced. The Program Administrators will then provide the Installer proposals that meet threshold requirements to the External Review team. It is expected that multiple installers may be selected for each Community or groups of Communities. This multi-installer model is different from the pilot Solarize campaign. Rather than directly working with one installer, a Community may choose to work with two or more and equally divide the leads generated among the installers. All installers will still need to provide a tiered discounted rate as part of their application. More details regarding the multi-installer model will be made available in the Installer RFP.



The External Review team will select the top three scoring installers to invite to an Interview Day. The Program Administrators will host the Interview Day in mid-October, during which time the Office of Energy Resources, the Renewable Energy Fund staff at Commerce RI, SmartPower, and the External Review Team will have an opportunity to interview the Installers. At least one member of the Community External Review team must be present at the Interview Day. More information about this event will be provided to the Communities selected to participate in the program.

After completion of the Interview Day, the Community External Review Team and the Program Administrators will select one, two, or possibly all three interviewed installers for the duration of the Solarize campaign.

F. Application Deadline

Responses to this RFA must be received by the Rhode Island Office of Energy Resources no later than 4:00pm ET on September 22, 2015. Only complete, timely responses will be considered. Responses to this RFA must be submitted to energy.resources@energy.ri.gov. OER, at its sole discretion, may determine whether an application is complete.

G. Anticipated Term

Upon selection, participating Communities will receive an executed OER-Community Letter Agreement outlining the roles of all participants as outlined in this RFA. An example is attached to this RFA (Attachment C). This Letter Agreement will not need to be executed by the Community. It is anticipated that the term of the Solarize program will begin in October 2015 and continue for one year after the end date of the program.

H. Questions and Contact Information

Please submit all questions to the Solarize RI Team, at energy.resources@energy.ri.gov. The resulting Frequently Asked Questions (FAQ) document will be posted at <http://www.energy.ri.gov/renewable/solarize/> on September 1, 2015. Please check back regularly as this document will be updated with questions and answers.

II. Performance and Response Specifications

A. Proposal Requirements

Applications are due at the Rhode Island Office of Energy Resources no later than 4:00pm ET on September 22, 2015. The Application must be in electronic form, including a scanned completed Application form (Attachment A), a letter of support from the Community, and a completed Proposal Checklist and Application (Attachment B). It should be submitted via email to the Solarize RI Team at energy.resources@energy.ri.gov. "Solarize Rhode Island RFA – Community Name" must appear in the email subject line.



Applications submitted after the deadline will not be accepted. Only complete applications will be accepted. OER, at its sole discretion may determine whether an application is complete. An announcement of the selected Communities is anticipated to take place in late-September 2015.

Applications must contain the following:

1. Letter from each municipal Chief Executive Officer containing the following:
 - Statement of Commitment: A statement of commitment of the Community's full participation and cooperation with the Program Administrators and the selected Installer(s) in this program (one letter for each Community if applying as a group is required). Elaborate on what the Community has the ability to provide in terms of resources or assistance to the Program Administrators to increase education and outreach during the program. If applying as a group, please provide examples of past coordination on similar projects.
 - Identification of the Primary Point of Contact for the Municipality (or one for each Municipality if applying as a group).
 - Identification of the two other members of the External Review Team to assist with the solar installer selection process (or one member if each Community is applying as a group).
 - (Optional) Community Energy/Sustainability Committee: If a Community has a Community Energy or Sustainability Committee, provide insight into whether the Committee will be involved in providing assistance to the Solarize RI campaign.
 - Partnership: If communities partner together to participate in the Program, the Program Administrators requests verification of that partnership, along with a commitment from each Community, stating they plan to work collaboratively to achieve success under the program.
 - Experience with solar: If applicable, demonstrate that the Community has experience with solar PV (either through a municipal project or other solar PV related activities).
2. Letters of Support from Community Energy or Sustainability Committee or other interested civic organizations
3. Community Outreach Plan containing the following (limit of 15 pages):
 - Provide a description of the designated team, including paid and unpaid positions, for the Community. Clarify any volunteer roles, interns, or staff resources that will be available during the course of the program.
 - Please list all known groups and organizations with which the Community will collaborate in conducting outreach for the Solarize RI program. If possible, please include letters of support from these various groups.
 - Describe the basic attributes of the Community, including but not limited to population, number of owner occupied residences, and other Community characteristics.

- Outline a marketing plan that describes methods to create Community awareness around the Solarize RI program, encourage participants to sign up for a solar site assessments, and encourage the adoption of solar PV installations. This may include outreach methods such as Community events, tabling, mailings, social media, banners, flyers, signs, identification of available public locations for banners and signage, utilizing municipal resources, and engaging Community partners that can assist with these efforts. Describe ways in which the Community marketing plan and outreach strategy could increase the number of sign-ups for a solar site assessment and expand solar PV adoption within the Community. Provide a plan for implementation, including how to engage additional Community members and volunteers. This should include an outreach activity timeline, expected volunteer activity hours (if any), and preliminary goals for Community participation and solar PV adoption during the program. Include information on where Community events could be held, including solar workshops. The Community should demonstrate that the available facility or facilities will be able to accommodate a minimum of 100 attendees and will have presentation capability (i.e. microphone, projector, screen, etc.)
Marketing plans will be made public on the Solarize website for installers as they are writing responses to the Installer RFP. Please note that only the marketing plan section will be excerpted from the application and posted. All other information, including contact information, will not be made available on the Solarize website.

12

4. It is encouraged that the principal point of contact and any identified volunteers have reviewed the [North Smithfield Pilot Round 1 Overview](#) which highlights the results and lessons learned from the first pilot round in North Smithfield.
5. Optional: If community resources of either staff time and/or marketing funding is available, please identify either the number of job hours available and/or the funding amount.
6. Permitting: Identify the local permitting process for solar PV projects within the Community. This should include, but is not limited to, information on the building and electrical permitting process and fee structure, as well as the permitting process for any local Historic or Conservation Commissions that may require engagement on projects. Please use the form located in Attachment B. Identify potential streamlining ideas or efforts that could be implemented in anticipation of large numbers or project permit applications. Also, note any restrictions to placing signs or banners in public places, or the use of lawn signs at private residences participating in the program.
7. Local Interest: Demonstrate that there is significant interest in the Community to participate and drive a successful program. It is highly recommended that communities conduct a survey or poll to gauge interest, and to develop an initial list of interested residents, or potential volunteers.
8. Group Proposal (if applicable): In some instances, there may be benefit for Communities to partner together as part of a proposal. It is the Program Administrator's expectation that the partnered Communities will work collaboratively and in many ways function as one broad



campaign. Only one (1) partnership will be selected, if any group proposals are received for the fall 2015 program. In order for Communities to submit a group proposal, they must fulfill the following:

- A group proposal may include three or fewer Communities.
- Each Community must be located contiguously (i.e. share a border) with at least one of the partner communities.
- Partnering communities must demonstrate the benefit of responding to this RFA as a group.
- Communities must demonstrate a history of partnership.
- Communities must outline how marketing and outreach efforts will be deployed across the Communities.
- Clarify what methods would be used to streamline communication between the Communities, Program Administrators and the selected Installer(s).

9. (Optional) Provide evidence of items listed among the bonus points outlined in the Community Commitment to Solar PV section above.

B. Evaluation Criteria

All proposals must meet Solarize RI objectives, and must be responsive to the relevant scope of work and proposal requirements outlined above. Proposals will be generally evaluated on the criteria below:

- Overall quality: overall quality of proposal; well-thought-out proposal components
- Team: description of primary point of contract's role, description of volunteer roles, demonstration of volunteer team capacity to drive program and the breadth of partnerships identified in proposal. Additional consideration will be given to communities that can demonstrate support by the municipality for the Solarize RI program;
- Marketing Plan and Budget: overall quality, scope and creativity of marketing plan.
- Additional resources: the extent to which additional resources (both financial and otherwise) are identified and potentially committed to the program;
- Permitting: degree to which Community can outline the permitting process for solar PV projects and identify any process or cost streamlining efforts;
- Proposed methodology: ability of proposal to drive resident awareness and interest in the program, sign-up for site assessment, and Community adoption of PV projects
- Group proposal (if applicable): demonstrate the advantages to responding to the RFP as a group rather than individual Communities.
- Bonus points available as stated in the Community Commitment to Solar PV section above (a maximum of five points may be awarded in the scoring).

13



III. General Request for Response Conditions

A. Notice of Public Disclosure:

As a public entity, the Office of Energy Resources is subject to Rhode Island's Public Records Law. Thus, any documentary material, data, or other information received by OER from an applicant is a public record subject to disclosure.

B. Waiver Authority

OER reserves the right, at its sole discretion, to waive minor irregularities in submittal requirements, to modify the anticipated timeline, to request modifications of the application, to accept or reject any or all applications received, and/or to cancel all or part of this RFA at any time prior to awards.

C. 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 RFP in part or in its entirety, or change the application guidelines, when it is in its best interests.

