



Solarize Rhode Island Installer Request for Applications

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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 the Rhode Island Commerce Corporation (Commerce RI) and SmartPower to issue this Request for Application (RFA) from solar photovoltaic (“PV”) Installers (“Installer(s)”) to participate in the Fall 2015 round of Solarize Rhode Island (“the Program”). This program will drive community adoption of solar (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 community through a group purchasing model. The Solarize RI program has been tremendously successful in the Solarize Pilot program, resulting in over 151 contracts signed in three communities. The Solarize RI Team is made up of staff from OER, Commerce RI’s Renewable Energy Fund team, and Smart Power (“Program Administrators”).

On August 27, 2015 OER issued a Request for Application for Rhode Island cities and towns to participate in the Fall 2015 round of Solarize RI. The Program Administrators will plan to select a minimum of five (5) communities or groups of Communities to participate. It is expected that the announcement of the selected Communities will occur on September 28, 2015 at a public press event at a location to be determined. At that time, OER will make the selected Community marketing and outreach proposals available for review at that time.

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Commerce RI and RIOER are working with SmartPower during the course of the Pilot for the education and marketing to the three communities. SmartPower is a non-profit marketing firm with experience conducting community energy campaigns. SmartPower has been employed in other regional states’ Solarize programs to develop promotional materials, manage websites and social media, and coordinate local community outreach campaigns.

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. 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, SmartPower and the External Review Team identified by each selected Community will



work to review the Installer applications. Quality of the application, proposed equipment, experience of Installer (or consortium) installing solar PV, number of installations in Rhode Island, pricing and installation practices will be factors in the selection process. The selection team will also perform reference checks to ensure positive customer satisfaction from past solar installation. An interview by the Program Administrators and the External Review Team with the top three installers or consortium will also occur. Refer to Section 15.b for more information regarding the interview process.

Selected Communities will be able to choose one installer, two installers, or even three to work with during the course of the program. This is the first time Solarize RI is allowing multiple installers for a Community within the Solarize RI Program. The goal of multiple installers is to ensure the best possible customer service experience for customers. The final decision of allowing multiple installers will be made by the External Review Team after the interview process. It is understood that multiple installers, if chosen, may not have the same tiered pricing but the Program Administrators will work closely to ensure that the distribution of leads and number of workshops hosted is equally divided among the installers.

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, 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 marketing, advertising, and providing education to multiple customers. By educating the local community, streamlining marketing efforts, and aggregating sales, the Program will help make solar PV a more accessible and affordable energy option.

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3. Community Selection

The Program Administrators have issued a Request for Application to Rhode Island cities and towns to participate in the Fall 2015 round of Solarize. Up to five (5) Communities or groups of Communities may be selected.¹ It is expected there will be another round of Solarize RI in the spring of 2016. This RFA refers specifically to the fall 2015 program. OER, Commerce RI, and SmartPower 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 provides 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. See Section 12c.iii. for more information about marketing and outreach plans.

4. Program Administrators – Program Marketing Support

OER, Commerce, RI and SmartPower 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 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 each selected Community's application. This will include event organization, creating 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 SmartPower for event coordination. They will be one point of contact for local residents who express interest in the Program. The selected installer 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.

5. Installer Selection

Through this RFA, the Program Administrators and the selected Community will select and partner with a solar PV installer (or a consortium of installers) 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

¹ Only one group Community application will be eligible for participation in the fall 2015. If two groups applications are submitted, only one will be chosen by the Program Administrators.

contracted solar PV within the community 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, providing 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). These concepts include, but are not limited to, innovative business models or provide options for other technologies such as Solar Hot Water or access to additional creative financing options. Note that solar hot water projects do 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 the selected Community’s volunteer team and one member of each of the three of the Program Administrator agencies².

External Review Team	
Selected Community	3
OER	1
Commerce RI (REF)	1
SmartPower	1

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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 will be invited to the Interview Day. The Program Administrators will host the Interview Day on September 24, 2015 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 September 24, 2015. If a consortium is applying, at least one representative from each Installer company must attend in person. At the completion of the event, the External Review Team will have a chance to reevaluate their ranking of the installers interviewed. The revised ranking sheets will be discussed among the External Review Team.

The selected Community will have the option to select one, two, or all three installers on the short list to partner for the program. Should a Community choose to work with multiple installers, a kick off meeting will be held with the selected installers, the selected Community’s External Review Team, and the Program Administrators to discuss the sharing of leads, coordination of marketing activities, and the solar workshops. If multiple installers are selected by the selected Community it is not expected that

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



the installers will be required to partner together or amend the pricing proposal in the RFA. It is expected that each installer be willing to work together to share leads and to jointly attend events.

6. Program Roles and Responsibilities

Once the Fall 2015 Solarize campaign has launched, interested customers in selected Communities will be able to contact the Installer(s) 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(s) before the Program deadline. The Installer(s) will be responsible for assessing individual sites, responding to all customers inquiries about their 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(s) 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 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 this in the application. All REF applications must include an Adder Form, (see Sections 11 and 12.c.viii. regarding adder forms).

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The selected Installer(s) may choose to participate in the Renewable Energy Growth (REG) Program (or both REF and REG for different customers).³ For projects eligible for the Small Scale and Medium Scale Programs, Adder Forms must be submitted to OER at the time the Installer applies to the REG program. 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 this in the application. 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.

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

It is expected that the tiered pricing proposed as part of the Installer's application 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.

³ A residential or commercial project is eligible for either the REF or REG programs, but not both.



Figure 1. Anticipated roles of the different parties in Solarize Rhode Island.⁴

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

	OER/ Commerce RI/SmartPower	Selected Community Outreach Team	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

⁴ 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.

Reduce Cost to Customer	Make available solar incentives ⁵ ; 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)
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 SmartPower, Solar Ambassador(s), and volunteers to support outreach; Will develop a portal to facilitate customer sign up

⁵ Commerce RI makes no guarantee that all applications to the REF Small Scale Solar Program will receive a grant. See Section 8.

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.

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It is expected that the primary point of contact for the selected Community, the three Program Administrators, and the 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 selected Community or 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. 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 – SmartPower

SmartPower is the nation’s leading non-profit marketing firm dedicated to promoting clean, renewable energy and energy efficiency. SmartPower 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 September 28, 2015 (See Section 15 for more information on timeline).

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 SmartPower 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, selected Community and the selected Installer(s).

8. OER and Commerce RI Commitment

OER Commerce RI agrees 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.⁶
- b. Will provide assistance, along with other Program Administrators to address issues related to contracts and community relations during the campaign.⁷
- 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 in order to qualify for the grant.
- d. Work with other Program Administrators on the Solarize RI brand and ensure that all logos from the selected Installer(s) are on all marketing material published under this Program.
- e. Assist the selected Installer(s) on the solar education in the selected Communities, 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. More information about the current state of each incentive program is below.

- a. Renewable Energy Fund – There are currently two rounds of Small Scale funding for the REF posted on the Commerce RI website.⁸ However, Block 7 will close before the official launch of the 2015 Fall round of Solarize. It is expected that the incentive rate will remain at \$1.15 per watt for blocks 7 and 8. Dates of future blocks of funding in 2016 will be posted on the

⁶ OER will work with National Grid on gathering application and completion documentation for REG projects.

⁷ 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.

⁸ <http://commerceri.com/finance-business/renewable-energy-fund/small-scale-projects/>



Commerce RI website no later than October 31, 2015. It is unknown at this time whether the incentive rate for the Small Scale Program will decrease in 2016.

There are two rounds of Commercial Scale funding for the REF posted on the Commerce RI website.⁹ It is expected that the incentive rates outlined in the *Request for Projects* document on the Commerce RI website will remain the same for Blocks 8 and 9. Dates of future blocks of funding in 2016 will be posted on the Commerce RI website no later than October 31, 2015. It is unknown at this time whether the incentive rate for the Commercial Scale Program will decrease in 2016. It is up to the solar installer(s) as to whether any commercial projects contracted during the Fall 2015 round of Solarize will be allowed to count towards the tier levels. It is understood by the Program Administrators that commercial projects may not receive the pricing proposed by the Installer in this application and it is determined on a contract by contract basis.

OER and Commerce RI will keep the selected installer(s) and the RI solar installer community updated if there are any changes to the REF funding levels for the Small and Commercial Scale programs. There will be a review process for all grant applications processed and Award Letters sent once the grant applications have been approved.¹⁰

- b. Renewable Energy Growth Program – On a monthly basis, National Grid posts the total nameplate MWs remaining in the Small Scale Solar allocation on the REG website. As of August 6, 2015, 56kW DC of nameplate capacity had been awarded a Certificate of Eligibility.¹¹ There are a total of 3 MWs available on a first come, first serve basis for the remainder of National Grid’s program year.

The 2016 ceiling prices for the REG program will be submitted to the PUC in November but approval by the PUC is not expected until February 15, 2016.¹² The program is expected to end on February 15, 2016. Installer(s) who have customers signed up for REG projects will submit the application for interconnection within a week of contract signing to ensure that customer will be eligible for the 2015 ceiling price. If the 3 MW allocation is fully subscribed before the end of the Solarize sign up period, OER will host a meeting between the installer(s), Program Administrators, and the selected Community to discuss the situation and how it may possibly impact the program. It is recommended that Installer(s) continue to check the National Grid REG website for the remaining MWs available in the Small Scale program throughout the course of the Solarize program.

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 10, 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

⁹ <http://commerceri.com/finance-business/renewable-energy-fund/commercial-scale-projects/>

¹⁰ As of the publication of the RFA, the REF program is undergoing an internal program change to possibly allow REF staff to approve grant applications without board approval. However, these procedures have not yet been finalized. An email to the solar stakeholders will be sent in mid-October detailing the new procedures for the REF.

¹¹ https://www.nationalgridus.com/narragansett/business/energyeff/4_dist_gen.asp

¹² The next presentation of the 2016 ceiling prices will occur at the next DG Board meeting at 4pm on September 22, 2015 at the Department of Administration in Providence, RI.

with OER agreeing to the Terms and Conditions listed below (Attachment C).

- 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. Prior to Program Launch, the selected Installer(s) and the Program Administrators will agree to specific Program metrics. The agreed upon metrics 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 February 15, 2016, 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 (see Section 9 for more information regarding available incentive programs).
- c. The Installer commits to providing customers with the tiered pricing outlined in Attachment B. All adders will be clearly defined in all turkey 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 that will be 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 Requirements¹³. All Solarize Rhode Island projects contracted during the sign up period will comply with those requirements regardless of which incentive program is applied to.
- 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 to use on Program documentation. All relevant 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 represent that positions taken or advanced by it 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 SmartPower, Inc.;
- h. Work with Program Administrators in developing additional marketing materials, including but not limited to, providing photographs or other information for use in marketing the Program,

¹³ <https://drive.google.com/file/d/0B4my6hqps6ziZIV3eTRRN0FzMXM/view>

and collaborate in obtaining photographs (using the Commerce RI Media Consent Form) and statements of support from Solarize customers for use of 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 will be able 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 on the conclusion of the campaign, including full name, email address, phone number, 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;
- n. Installer(s) agree not to market under the Solarize tagline in other future Solarize communities other than the selected Community;
- o. During the performance of this Agreement, 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 that it is insured against liability for Workers' Compensation and affirms that it will maintain Workers' Compensation 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. 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;
- t. This Agreement shall remain in effect for one (1) year after the Solarize Program sign up period ends;
- u. 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;

11. Scope of Work

Ten (10) business days after the Communities are selected to participate in the Fall 2015 round of Solarize, Installer applications s are due to OER (see Section 10 regarding timeline.)¹⁴ On September 28, 2015 an event will be held to announce the selected of the Communities. It is expected that five Community applications will be awarded. One of the five applications may include a group application. A Community Group application is defined as no more than three communities which share a contiguous border. See the *Solarize Rhode Island Municipal Request for Application* posted on the OER Solarize website for more information.¹⁵ Once they are publically announced, the selected Community's marketing and outreach plans will be available on the OER Solarize website in order for the installers to tailor their applications to the specific Communities participating in the 2015 Fall Solarize program.

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 community and begin plans for implementation. Shortly after being selected, the Installer will be introduced by the town as the selected Installer for the Program during a Kickoff event tentatively scheduled for October, 15 2015¹⁶.

¹⁴ October 6, 2015 is 10 business days after September 28, 2015. Please note these dates may be subject to change.

¹⁵ <http://www.energy.ri.gov/documents/solarize/Community%20RFA%20Final.pdf>

¹⁶ This is a tentative date and if it should change, OER will notify the selected Installer(s) as soon as possible.

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, or have applied for, a Renewable Energy Professional (REP) certificate by the Installer Interview Day. If applying as part of a consortium, all installers in the partnership must demonstrate they have, or are in the process of applying for, their own REP by the Installer Interview Day. A photocopy of the application can be used as evidence of having applied for a REP (please delete any social security information prior to submission to the External Review team).

Upon receiving the executed Letter Agreement from OER (see attachment C), 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 advance of Program Launch 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 Solar Hot Water, or requesting potential assistance from the Solarize RI Community volunteer team.

12. Application Requirements

This RFA for installer(s) is specific to the 2015 Fall Round of Solarize RI and not for future Solarize rounds under the Program. It is expected that a spring 2016 Round of Solarize RI will begin in March 2016. A new RFA for installers will be issued at that time. 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. There is no restriction for the number of Communities an installer can bid on. However, 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 2015 Fall round of Solarize RI and indicate which Community the RFA is for. 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. Include an organizational chart outlining the various key individuals and partners, a description of each and attach resumes and copies of licenses (including REP certificate(s) if available at application), of all key individuals on the project. 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 solar PV projects¹⁷.
 - 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 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 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.

¹⁷ The Installer may provide examples of PV installations outside of Rhode Island.

- iii. **Marketing Strategy:** Outline a marketing plan that describes methods to motivate community-driven solar PV installations. This should include ways a joint marketing strategy between the Community and the Installer(s) can expand the number of PV projects within the community. Include ideas by which the Community outreach 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 be 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 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.
- 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.

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 Community customers should include total installation costs, which includes system design, permitting, applicable materials and equipment, transportation, labor, and all equipment and workmanship warranties. 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 September 3, 2015 the average cost for installed direct purchased residential PV systems under the Small Scale Solar program was \$4.29/watt.¹⁸ In addition, the average cost/per watt for all REF Small Scale applications received and installed is \$4.26/watt. The statistical sample for the Small Scale REG program projects cost/watt received by National Grid to date is too small to provide 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 lists as a \$/kWh cost. Also, the Installer(s) may list an adder as a flat cost for Purchased projects. Installers will be responsible for identifying individual projects that trigger additional pricing and will submit appropriate documentation to the Project Administrators for tracking purposes.

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 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 Excel format

¹⁸ The actual \$/watt of installed projects completed under the Small Scale Solar program is \$4.99 however, this average included one battery backup system. When that project is removed from the list, the average is \$4.55.

- 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 Excel format either by email to energy.resources@energy.ri.gov or included on a CD or flash drive with one hard copy submission of all application materials. All applications are due to OER by 4:00pm on October 6, 2015. This date is ten days after the expected announcement of the selected Communities. 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 Community Name 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 commit to having a Renewable Energy Professional Certificate with the OER in place by the Installer Interview day. A statement in the Executive Summary stating this will be acceptable. A copy of the REP application submitted to OER will also be acceptable.
 - 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 proposed timeline for the RFA process and program is outlined below. Please note that this is an estimated timeline and dates maybe subject to change.

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Solarize Rhode Island Schedule	2015 Fall
RFA for RI Communities Released	8/27/2015
RFA for Solar Installers:	9/3/2015
RFA for RI Communities Due	9/22/2015
Press Event for Communities	9/28/2015
RFA for Solar Installers: Due	10/6/2015 @ 4:00pm
Threshold review of Installer Applications	10/7/2015
Community selection of top three applications	10/12/2015
Community-Installer Interview Day	10/14/2015 & 10/15/2015
Announce Selected Solar PV Installer(s)	10/19/2015
Begin Community Solar Ambassador Education & Volunteer Training	Throughout October 2015
Community Kick Off Event	10/19/2015
Customer Sign-Up Period Begins	10/19/2015



- a. Responses to this RFA must be received by OER no later than 4:00pm on October 6, 2015. 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 either October 13 and/or October 14, 2015. 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. 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 Excel format either by email to energy.resources@energy.ri.gov included on a CD or flash drive with one hard copy submission of all application materials. One hard copy of the application must be delivered to OER. All email submissions should include "Solarize Community Name RFA" in the subject line.

16. Questions and Contact Information

Questions regarding this RFA should be submitted via email to energy.resources@energy.ri.gov with the subject line "Solarize RI Installer RFA". All questions and answers will be posted on the OER Solarize website no later than September 22, 2015.

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.