

2016 SOLARIZE MASSACHUSETTS Shelburne Colrain Conway PROGRAM

Request for Proposals

Installer Proposal Checklist and Application Form

Note: It is the responsibility of the Installer to submit a complete proposal before the RFP deadline. Only complete proposals submitted prior to the RFP deadline will pass the threshold review and be considered for selection under the Solarize Massachusetts Program. The deadline is April 8, 2016 by 5:00 PM.

Installer Name:

Date:

Installer Proposal Checklist (Include the following items in application submittal)

- Attach a completed *Proposal Checklist and Application Form*
- Attachment A:** Pricing Contingencies / Cost Adders
- Attachment B:** Review the draft SMSCC– *Installer Contract Template*, and provide any comments
- Attachment C:** Review the draft MassCEC – *Installer Terms and Conditions* draft, and provide any comments
- Addendum 1:** Attach a copy of a template contract for a direct purchase project, a contract for a Lease and/or PPA option (if applicable), and contract language for a project receiving financing option (if applicable).
- Addendum 2:** Example marketing documents provided to residential customers
- Addendum 3:** Attach resumes or licenses (if pertinent) of key members of the Installer team
- Addendum 4:** Attach proposed equipment specification sheets
- Addendum 5:** Attach example email communication template, or if applicable, materials that would be provided to residents who are determined not to have a feasible site for solar
- Submit completed application prior to Installer RFP Deadline (threshold requirement)

2016 Solarize Mass Installer Application Form

Note: Please type in responses - do NOT handwrite.

1. Installer Primary Point of Contact

Installer Company Name	Primary Contact Name
Primary Contact Email	Primary Contact Phone Number

2. Proposed Company Partners/Team

Please complete as appropriate. There may be more than one partner in each category.

Additional Installer Company Partner	SREC Aggregator/Broker Company Partner
Lease and/or PPA Company Partner(s)	Additional Financing Company Partner

3. Proposed Equipment

A. Clarify the equipment that would be used for the default basic solar PV system package. The basic model should not include any optional equipment cost-adders. Also clarify if the National Electric Code rapid-shutdown requirement is met in the basic solar PV system package.

Major Component	Manufacturer	Model Number
<i>Inverter(s)</i>		
<i>PV Modules</i>		
<i>Mounting System</i>		
<i>Production Meter</i>		
<i>Data Acquisition System</i> <i>(if standard offering)</i>		
<i>Is NEC rapid shutdown requirement met in base solar PV package? (Yes / No)</i>		

B. List **all** proposed equipment to be used during the course of the program. **If selected, during the course of the Solarize Mass program, the Installer may only alter the list of approved equipment upon pre-approval by the Community and Technical Consultant.**

Major Component	Manufacturer	Model Number
<i>Inverter(s)</i>		
<i>PV Modules (Please also include any premium modules noted in Attachment B)</i>		
<i>Mounting System</i>		
<i>Production Meter</i>		
<i>Data Acquisition System</i>		

4. Proposed Services

Clarify all fields noted below. Where applicable, clarify Yes / No. If further clarification is needed, list any applicable notes below associated field.

Site Assessments and Installation

- _____ : Expected average number of full-time salespeople active in community during sign-up period
- _____ : Expected average number of part-time salespeople active in community during sign-up period
- _____ : Expected average number of physical site assessments conducted per week during sign-up period
- _____ : Average estimated number of installations per month
- _____ : Using installer data from previous solar PV installations, installer average time (in months) between project contracting and interconnection

Installer provides the following services:

Contracts:

Yes / No: Installer offers direct purchase option for residential systems

Yes / No: Installer requires up-front deposit at time of direct purchase contracting

If yes: Clarify deposit amount: _____

If yes: Clarify any conditions in which the deposit would be returned to the system owner if installation does not commence.

Yes / No: Installer offers financing options for residential direct purchase systems

If yes: Clarify further in 'Team Members and Partners section' of application below.

Yes / No: Installer offers lease option for residential systems

If yes: Clarify historic average of installations that are lease versus direct purchase systems: _____

Yes / No: Installer offers Power Purchase Agreement option for residential systems

If yes: Clarify historic average of installations that are PPA versus direct purchase systems: _____

Yes / No: Installer requires up-front deposit at time of lease and/or PPA contracting

If yes: Clarify deposit amount: _____

If yes: Clarify any conditions in which the deposit would be returned to the system owner if installation does not commence:

Yes / No: Installer offers direct purchase option for commercial systems

If yes: Clarify if any minimum size requirements, average installation timeframe, and other specifications as needed

Yes / No: Installer requires up-front deposit at time of direct purchase contracting

If yes: Clarify deposit amount: _____

If yes: Clarify any conditions in which the deposit would be returned to the system owner if installation does not commence:

Yes / No: Installer offers lease option for commercial systems

If yes: Clarify if any minimum size requirements, lease provider(s), and other specifications as needed

Yes / No: Installer offers Power Purchase Agreement option for commercial systems

If yes: Clarify if any minimum size requirements, PPA provider(s), and other specifications as needed

Yes / No: Installer requires up-front deposit at time of lease and/or PPA contracting

If yes: Clarify deposit amount: _____

If yes: Clarify any conditions in which the deposit would be returned to the system owner if installation does not commence:

Yes / No: Installer offers community shared solar option

If yes: Clarify model specifics

Yes/No: Installer has experience installing solar PV projects on properties with condo associations, and is open to contracting with a condo unit owner or condo association during the course of the program.

If yes: Clarify the following for the three below scenarios:

- a. *Single owner for 2-3 unit building*
- b. *Separate condo owners for 2-3 unit building*
- c. *Condo association of 4+unit condos*

Requirements for installer to contract with condo unit owner or condo association (ie. ownership of roof, legal approval from condo association). Clarify expected timeline for installations on properties with condo associations.

Yes/No: Installer has experience installing solar PV projects on multi-family buildings, and is open to contracting with a unit owner or multi-family building owner during the course of the program.

If yes: Clarify requirements for installer to contract with building owner or other parties.

Site-Specific

Yes / No: Installer subcontracts installation electrical or other work.

If yes, clarify expected percentage of systems would be installed with the assistance of a subcontractor, and what portions of the installation labor would the subcontracted.

Yes / No: Installer provides installation services on ground or pole-mounted solar PV systems

Yes / No: Installer provides installation services on slate-shingle roofs

Yes / No: Installer provides installation services on flat roofs or rubber membrane roofs

Yes / No: Installer provides installation of roof snow-guards or pest control devices if requested

Yes / No: If system owner needs to re-roof during lifetime of the solar PV system, installer provides services to remove and re-install solar PV array

If yes, clarify expected hourly or other fee for services.

Additional Services

At project completion, clarify what training on the solar PV system is provided to the homeowner. Additionally clarify what take-away documents are provided, such as a manual, 3-line diagram or other guidance.

Clarify installer process for recommending an aggregator or broker and assisting the system owner with the SREC registration process:

Warranties

Describe length and terms of workmanship warranty:

Describe length and terms of product warranties:

Additionally clarify labor costs on equipment warranty outside of workmanship warranty.

6. Installer [Tiered] Pricing Proposals¹

The bid must include a dollar per watt (\$/W) Purchase Price that will reduce as higher tiers are reached. If a Lease and/or PPA option is being offered, the Lease and/or PPA Price must be provided in the form of a dollar per kilowatt hour (\$/kWh) price. **The base price should include all installation costs, which includes system design, permitting, applicable materials and equipment, transportation, labor, a stamped structural letter, and all equipment and workmanship warranties for a default base solar PV system.**

While the Lease and/or PPA Price is expected to remain the same throughout the program, the bid should include a financial incentive (such as a rebate, check card, other incentive, etc.) that is received by Lease and/or PPA customers as higher tiers are reached. Please note that a Lease and/or PPA is not required in order to apply to the Solarize Mass program.

Tiers	1kW-25kW	>25kW-50kW	>50kW-100kW	>100kW-200kW	200kW+
Purchased Price (\$/W)					
Lease and/or PPA Price² (\$/kWh)³	Lease and/or PPA Price (at 90% optimal): _____ Down Payment at Contract (\$) ⁴ : _____ Escalator (%) ⁵ : _____				
Lease and/or PPA Incentive⁶	N/A				
Details on Lease and/or PPA Pricing Model	Explain any variations on the Lease and/or PPA model that will be provided. Outline the maximum range for pricing escalators that will be present in contracts:				
Financing Option (e.g., SREC pre-purchase, loans, etc.)					

¹ Installer should include a standard agreement for a Purchase project and a standard agreement for a Lease and/or PPA project (if applicable) as part of Addendum 1.

² If offering a Lease and/or PPA, provide a Lease and/or PPA price for a system that produces 90% of optimal production (see Solarize Mass and Mass Solar Connect Minimum Technical Requirements for how to determine optimal production). Provide information on how much money the typical customer will need to invest up front, and the typical contract escalator that is applied.

³ If a lease is offered, convert the payment to a \$/kWh price.

⁴ Indicate whether the typical customer will be required to put money down up front in order to lock in the Lease/PPA contract.

⁵ The Lease/PPA escalator is the rate by which the price will increase over the term of the contract.

⁶ Provide the incremental value that a Lease and/or PPA customer would receive as each new tier is reached, **NOT the cumulative value received (including prior tier incentives).**

Please additionally provide a summary of Lease and/or PPA Pricing based on alternate system production. Please complete the following, indicating what the price would be for a typical contract with the different production percentages, including the escalator.

% of Optimal System Production	100%	95%	90%	85%	80%
Lease and/or PPA Price (\$/kWh)					
Escalator (%)					

7. Expected High-Use Pricing Contingencies / Cost Adders

For the cost adders referenced below, clarify the expected percent of residential solar PV projects contracted under the Program will use the cost adder and associated additional cost. In addition, add cost adders in Attachment A. that are expected to be used in more than fifty (50) percent of all residential solar PV projects contracted under the Program.

<u>Cost Adder Name</u>	<u>Expected Percent of Systems with Cost Adder (%)</u>	<u>Added Cost (\$/watt) if applicable</u>	<u>Added Flat Rate Cost (\$) if applicable</u>	<u>Added cost (\$/kWh) if applicable</u>
<u>Automatic Reporting to the Production Tracking System</u>	<u>XX%</u>	<u>\$X.XX or n/a</u>	<u>\$X.XX</u>	<u>\$X.XX or n/a</u>
<u>Roof structural reinforcement</u>				
<u>Upgrade electrical service</u>				
<u>Upgrade to micro-inverters</u>				
<u>Upgrade to premium panels</u>				

Please see Attachment A in order to clarify all cost adders that may increase the total cost for a potential Purchase and (if applicable) a Lease and/or PPA project (above the base tier pricing outlined in Section 7 above).

8. Executive Summary (Maximum 1 page without header)

The Executive Summary should identify why the installer is applying to the SMSCC RFP, and summarize the highlights, key features and distinguishing points of the proposal, as well as any unique challenges identified by the Installer, along with proposed solutions.

9. Company Information (Maximum 1 page without header)

Describe the Installer Company, including company size, financial stability, and location, capacity for work, and access to various supply chains. Highlight relevant experience, skills and capabilities that would be used to undertake this Program, including, but not limited to, demonstrated experience through the sale and installation of solar PV projects in Massachusetts. The Installer should provide references for at least ten (10) of its projects within the state.

10. Installer Team Members and Partners

Identify all members of the project team, including but not limited to, partners assisting in project financing, customer service, outreach, project installations, and SREC aggregation or brokerage. As part of Addendum 4, attach résumés and copies of any licenses, if applicable, of all key individuals on the project. Note that Installers are welcome to partner together to submit a proposal.

Proposals may include the following:

- Identify any third-party financing partner(s) that will facilitate the Installer’s ability to provide a Lease and/or PPA Pricing, and the duration of the existing partnership (if applicable).
- Identify any financing partner(s) that will facilitate the Installer’s ability to provide customers with financing options, and the duration of the existing partnership.
- Identify any partnerships you provide to your customers to facilitate the sale of their SRECs.
- Optional: Propose a partner or contact who can install solar hot water systems, other renewable energy technology, or other energy efficiency measures.

Application Narrative

11. Marketing Strategy

Outline a marketing plan that builds off of the SMSCC marketing plan that would be used to motivate residents to contract for solar PV under the program.

- Describe what specific activities you would intend to engage in, in support of the community marketing strategy..
- Plan for communication with the volunteer team
- Include ideas on how to leverage SMSCC outreach to generate leads that are more likely to move forward to contracts.
- Clarify any experiences the Installer has with residential sales outreach efforts in the past.

12. Program Operations Plan

Describe a plan to provide good customer service for the participating residents, including timely lead contact, site assessments to interested customers, installation services, and SREC aggregation.

- Clarify intake process for customer leads, method for screening and contacting sites, and process for managing an increased volume of leads and projects.
- Outline how the installation process will be explained to the customer. Describe a quality assurance process for the solar PV installations and outline the process for managing any permits, inspections, and the interconnection process with the local utility.
- Provide a plan to address the Installer’s geographic proximity to SMSCC and how this will shape the services provided.

13. Project Installation Timeline

Provide an expected timeline for the average residential lead under the Program, from initial contact to contracting, to installation.

Additionally:

- Provide recommendations on ways the community volunteer team could assist with expediting the resident contracting process under the program.
- Outline how Installer will engage with customers regarding project installation timeline, and correlation with current state and federal incentive structure.

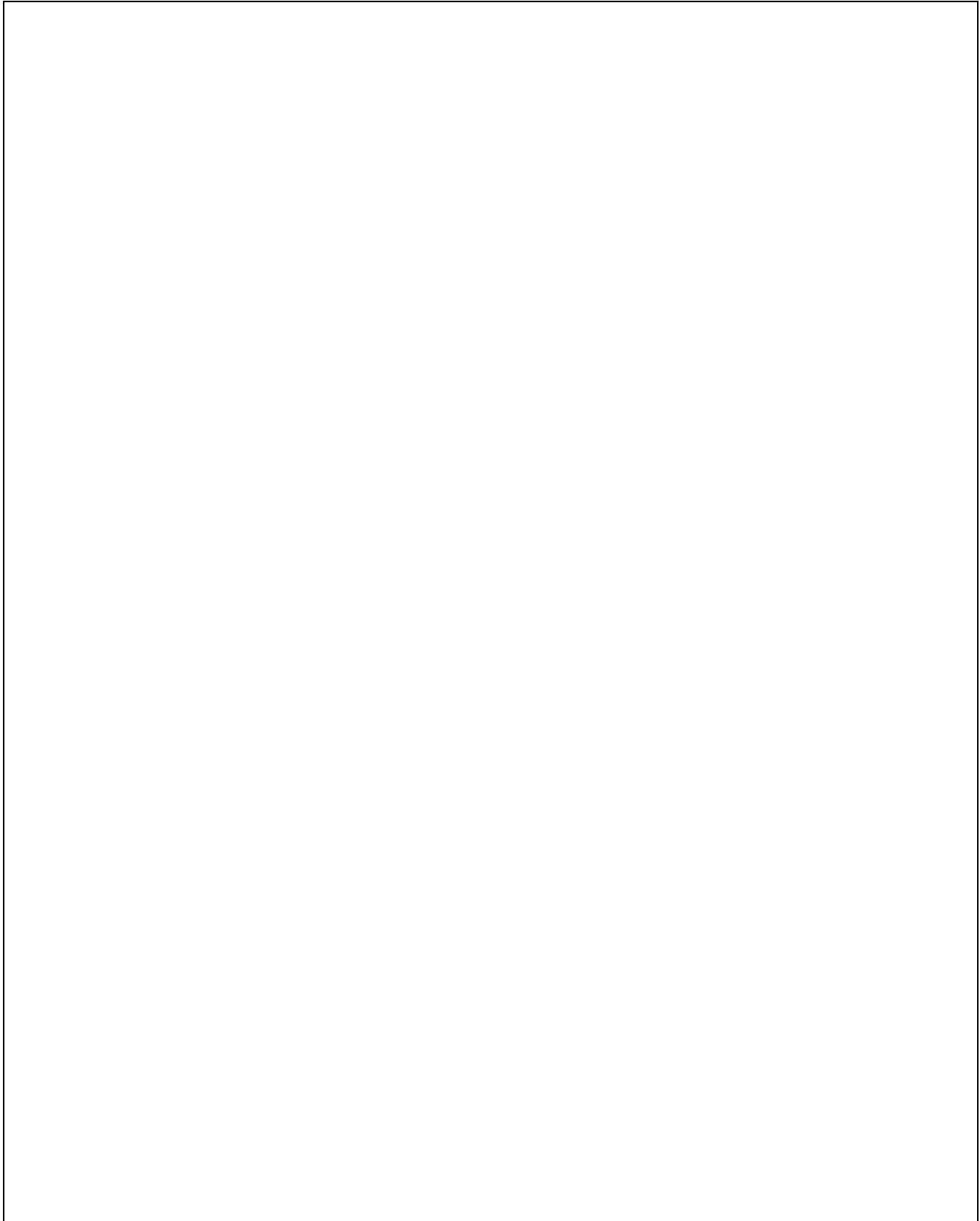
14. Clarify communication method for leads that do not have a feasible for solar PV

Outline the process by which the Installer team will communicate with leads that do not have feasible sites for solar PV (ie. primarily through email or phone communication). Describe if a customer (even with a feasible site for solar PV) might be assisted in other renewable energy or energy efficiency efforts through the Program. For example this may include solar hot water, additional thermal technologies, weatherization, or other energy related efforts.

Optional

15. Installer Group Proposal

If applicable, demonstrate the benefit of responding to the RFP as a group, a history of partnering, and outline how communication, marketing, and outreach efforts will be deployed.



16. Authorized Applicant's Signature and Acceptance

The undersigned is a duly authorized representative of the Applicant listed below. The Applicant has read and understands the Request for Proposals ("RFP") requirements. The undersigned acknowledges that all of the terms and conditions of the RFP are mandatory.

The Applicant understands that all materials, except certain materials that may be exempt under a statutory or common law exemption, submitted as part of the application are subject to disclosure under the Massachusetts Public Records Law, as explained in Section 3.A. of the RFP, and acknowledges and agrees that MassCEC has no obligation, and retains the sole discretion to fund or choose not to fund the application set forth herein, and that MassCEC's receipt of the application does not imply any promise of funding at any time.

The Applicant understands that, if selected by the Community, the Applicant and Community will detail and execute a contract that outlines the respective roles and responsibilities of the parties.

I certify that the statements made in this application, including all attachments and exhibits, are true and correct to the best of my knowledge.

Applicant: _____
(Printed Name of Applicant Organization)

By: _____
(Signature of Authorized Representative)

Name: _____

Title: _____

Date: _____