



Solarize Freeport

Request for Proposals from Solar Photovoltaic Installers

This Request for Proposals (RFP) is available online at:

http://www.freeportmaine.com/page.php?page_id=181&title=RFP/Employment

Please check online for updates prior to completing and submitting a bid.

All responses to this RFP must be sent electronically to Donna Larson, Freeport Town Planner dlarson@freeportmaine.com no later than **3:00pm on Thursday, January 15, 2015**. All bids will be open shortly after 3PM on January 15, 2015.

Installers may be asked to attend an in-person interview with a community selection committee during working hours the week of January 26, 2015, to be held in the Freeport Town Offices, 30 Main St., Freeport, ME 04032.

Please direct questions or feedback regarding this RFP to Donna Larson, Freeport Town Planner: dlarson@freeportmaine.com or (207) 865-4743 x103.

Table of Contents

3 Program Summary

Section One: Program Overview

- 4 A) Program Goals and Overview
- 5 B) The Solarize Freeport Process
- 6 C) Program Partners and Roles
- 7 D) Timeline
- 7 E) Detailed Installer Commitment

Section Two: Application Process

- 9 A) Eligible Applicants
- 10 B) Application Deadline
- 10 C) In-Person Interviews
- 10 D) Questions and Contact Information
- 10 E) Guidelines for Installers Interested in Bidding as a Consortium

10 Section Three: Proposal Requirements

11 Section Four: Evaluation Criteria

Program Summary

The Town of Freeport, Maine (“the Town”) requests proposals from solar photovoltaic (“PV”) installers (“installers”) for solar PV installations in the Solarize Freeport (“Solarize”) program.

The Town has been collecting the names and email addresses of residents interested in learning more about solar and how a “bulk purchase” can bring the cost of installation down for everyone involved. All leads will be forwarded to the selected Solarize installer (as of December 15, 2014, the Town has a list of 120 interested residents). This partnership is designed to lower customer acquisition costs and transfer savings directly to customers. The Town seeks proposals from installers who can provide competitive tiered pricing for a direct-ownership model for solar PV installations at private residences. While this program is primarily for residences, small farm enterprises and small businesses are also welcome to participate. Given the potential complexity that farm and small business installations can create, the Town cannot guarantee that small farms and businesses will be eligible for the special pricing.

The Town’s role is to bring property owners interested in investing in solar power together and to identify an installer or group of installers to get the job done at a lower cost to residents. The Town will also work with local lenders to identify opportunities for financing. The Town is not, in any way, providing a financial incentive for participation.

A consortium consisting of more than one installer may bid collectively on this proposal, as long as the partnering installers take responsibility for managing the partnership and maintaining a simple message and point of contact for residents. Relevant experience, quality and value of services and equipment, capacity for implementation of the Solarize program, proposed pricing, and unique or creative offerings will be factors in the selection process.

The purpose of Solarize Freeport is to increase the rate of solar use.

Solarize Freeport was inspired by similar programs in New Hampshire, Massachusetts and Connecticut.

SECTION ONE – Program Overview

A. Program Goals and Overview

i. Program Goals

Solarize Freeport is aimed at making residential solar PV energy more accessible to residents.

The goals of Solarize are to:

- 1) Lower the cost of solar energy by reducing customer acquisition costs and transferring those savings directly to residents; and
- 2) At least double the number of residential solar installations in the community over the course of this project.

ii. Program Overview

Solarize is designed to overcome common barriers to going solar at a residential scale:

A) Consumer Confidence

- Solarize is designed to bring residents interested in solar energy together, provide them with information, competitive pricing and an easy start, and take the next step when they're ready (e.g. a free site visit, signing a contract to go solar).
- Solarize is designed to be as transparent as possible. All Solarize pricing is posted online, along with details about the Solarize program, and lists of other installers in our area.

B) Cost

- Outreach done by the Town helps reduce typical customer acquisition costs and can lead to numerous installation jobs for the selected installer. These factors help installers bidding on Solarize Freeport to offer competitive pricing, often discounted below their typical installation prices. Their pricing is also tiered, meaning the cost goes down for everyone as more residents sign up to go solar.
- Financing may be necessary to make solar feasible for many residents. A list of known financing options will be prepared by the Town and distributed on an as needed basis. The Town will work with local lenders to improve those options. Any financing options that an installer has to offer should be described in the Company Profile narrative (Form B-1, page 2)

C) Inertia

- A critical component of any Solarize program is its deadline. Residents must sign a contract with the partner installer by a certain date in order to take advantage of the special tiered pricing offer. This deadline helps motivate residents to take action.
- The tiered pricing structure serves as a motivator for residents to talk with their neighbors about Solarize and encourage one another to take action. More neighbors going solar means lower prices for everyone.

B. The Solarize Freeport Process

The Town will create a small installer selection review committee (selection committee) including an independent technical consultant to help throughout the selection process. See Page 11 for evaluation criteria.

In the event that a bid is found to be incomplete, or the selection committee has a question or request, the bidding installer will be notified and given three business days to respond.

The selection committee may invite one or more installers for an interview (likely during the week of January 26, 2015).

The Town expects installers to submit competitive and realistic bids. Bidding installers should not sacrifice their bottom line or the quality of their equipment and services in order to participate in this program. The equipment and services included as part of the tiered pricing proposal should be representative of a typical roof-mount system. Cost adders should truly be adders, not commonly required components. Cost adders can also include options that would reduce system cost. For homes that aren't candidates for solar installation, the Town expects the selected installer to work with the Town in identifying a potential site for a solar farm.

Program Implementation

The Town expects the selected installer to hold an informational meeting with potential solar customers. The town will advertise this meeting using their list of residents interested in learning more about solar as well as other forms of communication such as the town newsletter, public access TV, and local news publications. The town will provide the location for the meeting. Once the installer and potential solar users are brought together, the town will no longer be involved.

Solarize Freeport is meant to catalyze many small-scale residential solar installations. Any resident of Freeport can contact the selected installer to receive a site visit and quote (at no charge) based on the equipment and special tiered pricing outlined in the installer's bid. Residents must sign a contract with the selected installer by the program deadline in order to be eligible.

Residents of Freeport are free to seek bids and work with other installers, and non-Solarize installers are free to continue marketing and doing business in Freeport. The town will be open with the public about the installer selection process and the fact that the Solarize partnership in no way limits customer choice. Competition among installers during the Solarize campaign is expected and typically healthy. Any installations contracted during the Solarize program with non-Solarize installers will *not* be counted as progress toward the tiered pricing established by the Solarize installer.

The town is committed to working with small businesses and farm enterprises as well as residents. If there is a known demand for solar installations for farms and small businesses, the town will organize a forum to address unique challenges and opportunities for each group with respect to going solar. Installers will be expected to work with farms and small businesses, and be familiar with any unique incentives or tax considerations available to these potential customers. Any of these small businesses and farms that participate will count toward the tiered system of pricing. Installers may establish limitations in size or other aspects of a potential system for small businesses and farms. If so, that information should be included in Form C- Core Solarize proposal.

Installer

The partner installer (or consortium of installers) will offer transparent and competitive tiered pricing, collaborate with the town on outreach and lead tracking throughout the program, and provide Solarize customers with a turnkey inquiry-to-installation process that will make them want to encourage their neighbors to go solar too. Detailed installer responsibilities are outlined in the following pages.

The following chart outlines specific partner roles and responsibilities:

	Town of Freeport	Installer
Securing Solarize Partners	<ul style="list-style-type: none"> • Release RFP to installers; facilitate the installer selection process • Using various communication resources, make residents aware of Solarize Freeport and maintain a list of residents interested in participating • Evaluate installer proposals and select a partner installer • Work with local lenders and Efficiency Maine to identify low cost loan options 	<ul style="list-style-type: none"> • Submit competitive bids
Reduce Cost to Customer	<ul style="list-style-type: none"> • Provide online resources and handouts detailing available incentives and financing options 	<ul style="list-style-type: none"> • Free site visits • Competitive, tiered pricing • Help customers understand and apply for available incentives • Assist customers in assessing purchase / financing options

Marketing/ Outreach/ Education	<ul style="list-style-type: none"> • Manage website as a central resource for program info • Provide updates to residents who have asked to be included in the program • Attend and support key community outreach events 	<ul style="list-style-type: none"> • Prepare a presentation for the Solarize launch event • Answer technical questions from residents • Optional: supplement community outreach (e.g. direct mail, yard signs, etc.)
	<ul style="list-style-type: none"> • Communications and media strategy/support • Manage attention from regional media outlets 	<ul style="list-style-type: none"> • Provide relevant information for the Solarize Freeport website, and link to the Solarize website on the installer's website • Cooperate with partners to provide content (e.g. photos, stories) and accommodate media
	<ul style="list-style-type: none"> • Participate in bi-weekly check-in calls 	<ul style="list-style-type: none"> • Provide site assessments, system design, and turnkey installation • Participate in bi-weekly check-in calls
	<ul style="list-style-type: none"> • Receive and manage bi-weekly reports from installers • Track leads generated from website form(s) • Ensure all partners have access to up-to-date contacts 	<ul style="list-style-type: none"> • Track leads and contracts

C. Timeline

RFP for Installers: Released	December 15, 2014
RFP for Installers: Due	January 15, 2015 3:00 pm
Community selection committee and an independent technical consultant to review proposals and to hold interviews with installers (if deemed necessary)	Week of January 26, 2014
Installer selected	Week of February 9, 2015
Solarize Launch Events	Between February 16 – March 1, 2015
Deadline to sign a contract with installer to receive special pricing	April 15, 2015
Expected program finish date (depending on number of contract signed)	October 2015
Survey Solarize Freeport participants (customers and installer(s))	December 2015

D. Detailed Installer Commitment

Collaboration with the Town

- a. Participate in bi-weekly calls with the Town;
- b. Participate in community events throughout the program where appropriate (participation at the launch event is required);
- c. Collaborate with the Town on press releases; developing additional marketing materials, including (but not limited to) providing or helping to obtain photographs, statements of support, testimonials, or other information for use in Solarize marketing;
- d. Collaborate with the Town to recommend alternative opportunities, where appropriate (i.e., through solar farms or other renewable energy projects such as pellet stoves), for interested residents without feasible sites for a solar PV project;
- e. At the end of the program, meet with the Town and provide feedback, including insights about customer decision-making process, motivations to install or not install solar, suggested program improvements, and the efficiency of different outreach strategies.

Ownership and Pricing

- a. Provide a dollar per watt (\$/W) purchase price for a typical, all-inclusive, roof-mount installation that will decrease by tier levels as the total contracted capacity of solar PV within the community increases (see Form E). Tier levels shall be determined by the install;
- b. Provide a list of additional system features (see Form E) which may be preferred or required in some (but not the majority of) cases and would impact the final project cost. This list of adders and associated costs will be published with other pricing information;
- c. Provide all customers within the community with pricing at the appropriate tiered level. Any contract between the installer and the customer must acknowledge the current tier price and lay out a process through which the final system cost will be adjusted and reconciled to reflect the community's final tier price after the program deadline. The contract must also include a guarantee that the work will be completed as proposed along with a remedy if the work can't be completed.

Marketing Materials, Presentations, and Claims Made Throughout the Program

- a. All partners must refer to the Program as "Solarize Freeport" in all community outreach materials and marketing efforts, and direct individuals interested in participating in the Program to Donna Larson at dlarson@freeportmaine.com;
- b. All installers must ensure that any media they produce does not claim to represent the opinion or position of the Town of Freeport;
- c. All installers must use a reasonable escalator rate for predicted utility price in all marketing and in predicting payback periods, and make clear that all figures are based on given assumptions;
- d. All installers must use an average current utility rate based on current electricity rates (including any increases that have been approved by the Maine Public Utilities Commission) in the area in all marketing and make clear that rates are based on averages;

- e. All claims regarding federal tax credits should include a suggestion to contact a tax professional;

Tracking

- a. Installers must track the pricing associated with each project, detail why a specific project requires additional costs (if applicable), and provide all information regarding final project cost and composition to the Town at the end of the program;
- b. Installers must provide the Town with regular tracking reports (at minimum every other week);
- c. Installers will communicate to all leads verbally at the time of the site visit that their contact information and project status will be shared with the Town, but only for the purpose of measuring the success of the project and to calculate the savings to residents by participating in the program;
- d. Installers will communicate to customers verbally that their contact information and project status will be shared with the Town unless the customer requests otherwise;
- e. Installers will notify the Town of any leads who, at any point in the program, request their information not be shared.

Customer Service

- a. Installers will provide links to the Town of Freeport website (www.freeportmaine.com) where appropriate on the installer's website;
- b. Installers will provide appropriate Solarize customer contact information to be posted on Solarize marketing materials and web pages;
- c. Installers will contact all customers who request a site visit or submit an inquiry within two business days;
- d. Installers will make every attempt to complete site visits with Solarize leads within two weeks of first contact, and will clearly communicate with leads about the expected timeline and any changes in that timeline;
- e. Installers will provide objective information to enable customers to choose among any solar financing options offered or otherwise available;
- f. Installers will work with customers to identify and apply for available incentives, and all Solarize projects applying for incentives must meet requirements for incentive eligibility;
- g. Installers will maintain high standards of quality and value when presenting proposals to Solarize leads and aim to design high-efficiency systems;
- h. Installers will be familiar with and comply with all relevant codes and requirements, at the local, state, and federal level, for all installations to be completed through the Solarize program;
- i. Installers must outline and be prepared to enact a contingency plan in the event that the customer service expectations described are not being met (as determined by the Town) due to an increased volume of leads or any other reason.

SECTION TWO – Application Process

A. Eligible Applicants

In order for an installer to be eligible to submit a proposal, the installer must:

- a. Demonstrate experience and proficiency in solar PV installations, be a NABCEP certified installer, and have at least (1) one master electrician on staff.
- b. Submit a proposal that meets all of the threshold review criteria outlined in Section Four.

B. Application Deadline

Responses to this RFP must be received by the Town of Freeport no later than **3:00pm on Thursday, January 15, 2015**. Proposals should be in PDF format and attached to an email sent to Donna Larson at dlarson@freeportmaine.com. Please label your proposal materials clearly. Donna can be contacted directly at 865-4743 ext 103 if you have any questions, concerns, or technical difficulties in submitting your proposal.

C. In-Person Interviews

Depending on the RFPs received, the Town may opt to interview prospective installers. If so, the interviews will be held at the Freeport Town Offices, the week of January 26, 2015, between 9am and 5pm (specific day and times to be determined).

D. Questions and Contact Information

Please contact Donna Larson, Town Planner for the Town of Freeport, with any questions (contact information below).

Donna Larson
dlarson@freeportmaine.com
(207) 865-4743 x103

E. Guidelines for Installers Interested in Bidding as a Consortium

A consortium consisting of more than one installer may bid collectively as long as the partnering installers take responsibility for managing the partnership and maintaining a simple message and point of contact for residents. Partnering installers should strive to maintain the following critical program components:

- A single lead contact person for the partnering installers is identified;
- A single tiered pricing structure, or a pricing structure that is otherwise simple for potential customers to understand; and
- Protocols are established with regard to the shared responsibility and assignment of individual projects to participating installers. Partnering installers take full responsibility

for managing their relationship. The Town will be focused on gathering leads and cannot be expected to manage relationships between multiple installers.

SECTION THREE – Proposal Requirements

Required Forms to be completed:

- A. Installer Contact Information – Form A** (If applying as a consortium, complete only one form on behalf of the group)
- B. Company Profile Forms B-1 and B-2** (If applying as a consortium, each partner installer must complete a separate form)
- C. Core Solarize Proposal Form C** (If applying as a consortium, complete only one form on behalf of the group)
- D. Equipment and Pricing Proposal Form D** (If applying as a consortium, complete only one form on behalf of the group)
- E. Authorized Signature Form Form E** (If applying as a consortium, complete only one form on behalf of the group)

The forms listed above are available online at

http://www.freeportmaine.com/page.php?page_id=181&title=RFP/Employment

Required Attachments:

- ☐ **Sample Solarize customer contract (for a residential system)**
- ☐ **Sample Solarize customer proposal (for a residential system)**
- ☐ **(if applicable) Sample terms for any lease/ or other financing options offered**
- ☐ **(if applicable) Explanation of any lease or financing options offered and how they will be incorporated into the program, particularly with respect to the tiered pricing model.**

SECTION FOUR – Evaluation Criteria

Threshold Requirements: The Town will review all bids for completeness prior to forwarding bids to the selection committees. If the Town finds any bid to be incomplete, the installer will be notified and given three business days to produce any missing information. Bids will be considered complete if each of the required forms is present and completed, and each of the required attachments is present (see Proposal Requirements in Section 3 above).

Evaluation Criteria: Complete bids will be evaluated by a selection committee selected by the Freeport Town Council for this purpose only. An independent technical consultant will be available to support the group. Selection of an installer will be based on the following criteria:

- **Relevant experience** of the installer company and its staff;
- **Overall quality and value** of the proposed services and equipment;
- **Solarize implementation** – the installer’s ability to provide timely and high-quality customer service and installation services given the expected volume of leads generated by Solarize outreach, as well as to collaborate with community volunteers;
- **Tiered pricing** and cost adders proposed by the installer are clear and offer good value;
- **Unique or creative offerings** – e.g. unique technologies offered, unique business model, creative outreach ideas;
- **Commitment to growing the use of solar in Freeport** – see below.

The goal of Solarize Freeport is to increase the rate of adoption of solar in Freeport, and to sustain that momentum beyond the timeframe of this program. Strong installer partners will demonstrate commitment to building the market for solar energy beyond their participation in Solarize. In determining an installer’s ability to continue solar installations after the project, the following will be considered:

- Does the installer have a history of solar installations in the Freeport area?
- Has the installer demonstrated a commitment to growing a strong market for solar in Freeport throughout and beyond the Solarize program?
- Are any relevant members of the installer team based in the Freeport area?
- How far will the installer have to drive to reach Freeport?
- Where is the installer’s business headquarters located?