Plano Solar Co-op RFP

Tuesday, March 2, 2021

Dear Installer,

Thank you for your interest in the Plano Solar Co-op! We're excited to issue a Request For Proposal (RFP) on behalf of a group of 51 homeowners in Plano, Frisco, and McKinney. We've worked closely with community stakeholders including Habitat for Humanity of Collin County, Plano Solar Advocates and volunteers to recruit interested homeowners for this group and we hope to make the process of going solar inclusive and accessible.

We are issuing this RFP with the intent of selecting one company ("Proposer") to provide solar photovoltaic (PV) energy systems for all the participating homeowners. The Proposer will provide a single price/Watt installed for the group. This price will be offered to all homeowners participating in the group.

The goal of the solar co-op is two-fold: (1) to enable the co-op members to receive competitive pricing on their solar systems by going solar as a group, and (2) to provide the project developer with an extensively pre-screened and well-educated group of customers.

Plano Solar Co-op Timeline

1. RFP Issue Date: Tuesday, March 2
2. Proposals Due: Tuesday, March 16 by 5:00 pm
3. Selection Committee Review: Thursday, March 25 (tentative)
4. Notice of Intent to Award: Friday, March 26 (tentative)
5. Installer Award Agreement Completed: Week of March 29
6. Deadline for new co-op members to sign up: Monday, May 31
7. Deadline (tentative) for all site visits completed: Wednesday, June 30
8. Deadline (tentative) for all proposals to co-op members: Wednesday, July 14
9. Deadline (tentative) for all signed contracts: Saturday, July 31

We are working to help as many homeowners go solar as possible. We also want to help grow a strong, vibrant solar market in the region. We've been organizing solar cooperatives since 2007, facilitating more than 270 solar co-ops with thousands of co-op members, resulting in over 5,300 installations totaling 42 MW of contracted residential solar.

If you would like to submit a response to this RFP, please complete the attached RFP Response Template. Proposals are due to txteam@solarunitedneighbors.org by 5:00 pm on Tuesday, March 16. (Late submissions will not be accepted.)

Below you will find additional information and requirements for compiling a compelling proposal. If you have any questions about the process or expectations, please don't hesitate to email.

We look forward to receiving your submissions!

Best,

Hanna Mitchell
hmitchell@solarunitedneighbors.org
Program Director, Solar United Neighbors of Texas

Please respond to this RFP by completing the provided "RFP Response Template" Word doc. The following are bid requirements and useful suggestions

Scope of work

Services to be provided by Solar United Neighbors

1. Pre-screen co-op members by reviewing each roof via publicly available satellite imagery. Assessments performed by Solar United Neighbors are categorized by "Qualified", "Maybe Qualified", and "Disqualified" (based on shading, size, shape, orientation) and are not intended to be overly restrictive. Our goal is to find the balance between wasting a homeowner's or the developer's time and unnecessarily excluding co-op members.
2. Recruit co-op members after selection (see timeline above). We expect the numbers of co-op members to increase significantly by the end of the project cycle.
3. We'll issue promotional materials (press release and social media posts, etc.) as well as work to generate local media attention. We'll clear materials with you to the best of our ability. We will feature your company prominently while keeping bid details confidential.
4. Support co-op members and the selected developer throughout the process.
5. Host celebration of successful co-op and public recognition of the work of the installer.
6. Distribute information should any details about the RFP be clarified or changed during the RFP period.

Services to be provided by the Proposer

1. A custom proposal for each co-op member in the group based on the group pricing and component offerings outlined in bid. The proposal should include language that explains all the services provided in the turnkey price for the system (assessment, system design, permitting, installation, interconnection paperwork, etc.). Please provide us the first three (3) proposals you send to co-op members.
2. Site assessment, structural assessment, design, equipment procurement, installation, monitoring setup, financing, customer training (i.e. safety rules, monitoring, maintenance, how to deal with problems, etc.), permitting, and application/management of applicable incentives.
3. $600 per signed contract to be paid to Solar United Neighbors as a development fee. This fee should be incorporated into the $/W price, not listed as an adder. We accept payment by check or ACH (electronic bank transfer).
4. Responsive communication with group members.
5. Responsive communication and coordination with Solar United Neighbors about group and individual co-op member status.
6. Participate in public education/outreach events.
7. Installations performed in conformance with all applicable laws and codes, interconnection requirements for net-metered installations and any incentive-related installation requirements, rules, and timelines. Solar United Neighbors defers to the SEIA Solar Business Code as a determinant of fair, transparent business practices to ensure solar customers are treated in a fair and honest manner. In addition to the SEIA Code, Companies shall abide by the law and all applicable ethical business guidelines set forth by the Council of Better Business Bureaus (BBB), Federal Trade Commission (FTC), Consumer Financial Protection Bureau (CFPB), relevant state consumer protection bureaus, and other regulatory bodies with jurisdiction.

8. For installers that provide brokerage services for SRECs, installer may not obligate co-op member to sell SRECs to said installer. As long as co-op member retains ownership of the solar system, co-op member should be able to select his/her preferred broker, which may include installer. If co-op member opts for a PPA or leased system, installer may manage SRECs freely.

Bid Requirements

- **Offer a single purchase price ($/Watt) for all co-op members.**
  - This price will be offered to all of the homeowners (and businesses) participating in the solar co-op.
  - You may not exclude from your proposals any of the co-op members involved in this RFP.
  - You do not need to provide individualized proposals for each homeowner in this initial bid. If selected to develop the group of projects Proposer will provide individualized proposals for each co-op member.

- **Explicitly state any additional charges not included in the $/Watt price in the proposal** (e.g., charges for electrical upgrades, steep roofs, specific roofing types/materials, roof attachment methods/components, multiple array locations, small system size, customized racking, tree trimming, etc.)
  - The assumption is that all costs to most co-op members are factored into the base price, and that an additional charge, if necessary, is reserved for unique circumstances.

- **Consider all selection criteria when preparing your proposal**. Although the Selection Committee will look for aggressive pricing, price is **not** the only factor they will consider. Co-op members also value experience in the marketplace, quality system components, and strong warranties, among other factors. Solar co-ops should not be a "race to the bottom" in terms of system price and quality, nor do we want proposers to feel they must sacrifice quality in order to be selected.

- **Bid with PV modules that**:
  - Are listed and reviewed on the California Energy Commission list, 'Incentive Eligible Photovoltaic Modules in Compliance with SB1 Guidelines' or installer must provide similar performance information for selection committee from an alternate source, or by referencing a CEC-listed panel from the same product family.
  - Have at least a 25-year power warranty with a specified performance degradation curve showing acceptable levels of performance or replacement and show achievement of a minimum of 80% of the nameplate rated power at STC by year 25;
  - Have a product warranty of at least 10 years.

- **Bid with inverters that:**
  - Are included in the California Energy Commission list 'List of Eligible Inverters per SB1 Guidelines' or installer to provide similar performance information for selection committee from an alternate source or by referencing a CEC-listed inverter from the same product family.
  - Have a warranty that allows for replacement due to premature failure over the specified warranty time frame and be a minimum of 15 years for micro inverters and 10 years for string inverters.

- **Utilize mounting equipment that is**:
  - Grounded in accordance with manufacturer's specifications.
  - Used in accordance with its manufacturer's listed purpose and specifications.
  - Used in accordance with manufacturer specifications for waterproofing penetrations.

- Meets any specific local zoning requirements beyond #2 and #3.

- **Meet the following insurance requirements** (for proposer and any sub-contractors): [i]
  - General liability - $1,000,000 per occurrence, $2,000,000 in aggregate.
  - Worker's compensation - $1,000,000 each accident, each employee, policy limit.
  - Automobile liability - bodily injury, death, and property damage combined single limits of at least $1,000,000 per occurrence covering vehicles owned, hired, or non-owned.
  - NOTE: Official proof of exemption by applicable jurisdiction for any above insurance requirements for a company is also acceptable.

Have you worked on a Solar United Neighbors co-op before?

In order for you to be eligible to submit a proposal for this co-op, you must:

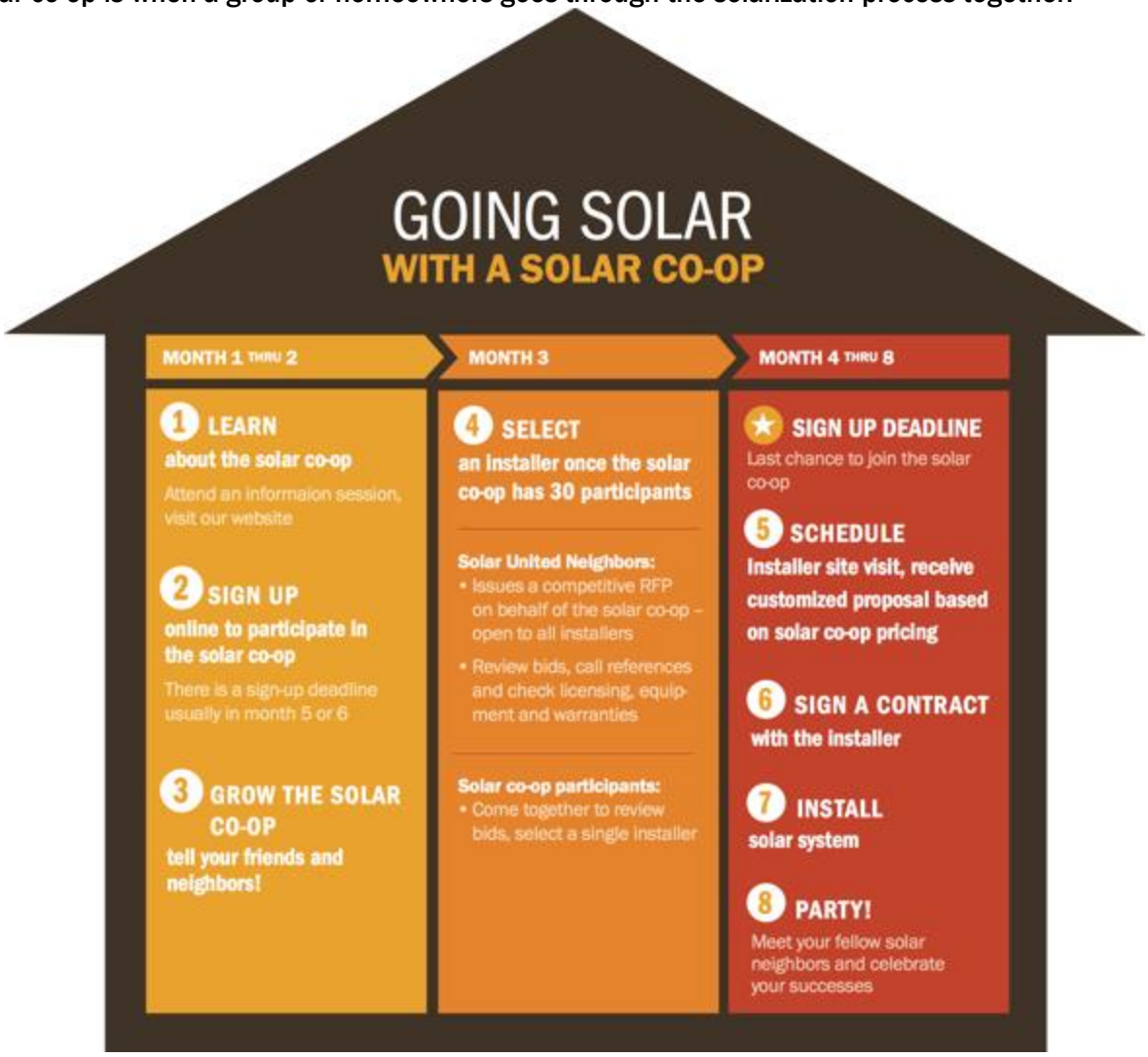
1. Have no overdue invoices for past solar co-op work.
2. Have updated all customer tracking data for active or completed co-ops (including kW installed and interconnection completed dates).
3. Have completed initial contacts, site visits, and individualized proposals for the majority of any existing co-op you are currently working on.

Solar United Neighbors reserves the right to deny any proposer's bid due to overdue payments, lack of proper licensure for applicable jurisdictions, or outstanding co-op member grievance yet to be resolved.

Useful Info

How a solar co-op works

A solar co-op is when a group of homeowners goes through the solarization process together.



More detailed information about each phase is available here:
http://www.solarunitedneighbors.org/for-installers/

How a co-op selects an installer

After all interested installers have submitted a proposal in response to this Request for Proposals, Solar United Neighbors will convene a selection committee of co-op members. This Selection Committee, consisting of homeowners participating in the solar co-op, will review the proposals. Each Selection Committee member signs a confidentiality agreement to keep your bid details private. The Committee will select **one Proposer** to develop all the projects for the group.

The process used to select the winning bid will be as follows:

1. Once Selection Committee members sign the confidentiality agreement, bids will be distributed to Selection Committee members along with a summary spreadsheet created by our staff.
2. Selection Committee members may review bids independently before meeting as a group.
3. Committee members will convene in one evening to review all bids and make a decision. During that meeting they will:
    a. Discuss each bid.
    b. Select finalists.
    c. Contact the designated bid representative for each finalist if a bid component needs clarification. (Committee may decide not to contact finalists if no clarification is needed.)
    d. Select a winning company to service the co-op.

If you are selected as a finalist and the committee calls you that evening, you will have an opportunity to speak about your bid and to answer questions. Please abide by the following:

1. No discussions of other installers' bids, reputation, etc. This is about your proposal only.
2. Please do not negotiate to change any aspect of the bid from what is in your proposal. Clarifications of what's included are acceptable.
3. Keep responses as brief as possible.

Selection Criteria

**Please note: The "importance" column below reflects the selection criteria priorities and preferences of the co-op members and will often vary from one co-op to another*

Category	***Description***	***Importance***
Competitive Pricing *Questions 1 – 11*	The extent to which proposed pricing terms are competitive.	78.43% of members indicated competitive pricing as important.
System Quality & Sourcing *Questions 12 – 15*	The extent to which the Proposer incorporates high-quality components (high CEC panel ratings, flashed/non-penetrating attachments, etc.) and American-made products into their system design.	76.47% of members indicated system quality and sourcing as important.
Proposer Experience & Qualifications *Questions 16 – 19*	The extent to which the Proposer demonstrates a track record of quality work and incorporates photovoltaic technologies in line with industry standards. Experience in the Dallas market a plus.	49% of members indicated proposer's experience and qualifications as important.
System Warranty *Questions 20 – 22*	The extent to which the Proposer offers strong warranties on system components and labor.	70.58% of members indicated system warranty as important.

Social & Community Benefits *Questions 23 – 25*	The extent to which the proposed solar PV systems foster social and community development, including hiring local workers and offering local job training opportunities. Preference will be given to locally owned companies. Active membership in MDV-SEIA, our partner on policy issues, is also a plus.	21.56% of members indicated proposer's commitment to social and community benefits as important.
Please take note of these non-solar offering questions:		
Battery Storage *Question 3*	The number of co-op members who are considering battery storage.	31 members indicated interest in battery storage. 17 members indicated potential interest in battery storage.
Level 2 Electric Vehicle Chargers *Question 4*	The number of co-op members who are considering a level 2 EV charger for their home.	13 members indicated interest in level 2 EV charger.

If you would like a summary of roof types in this co-op, please contact us.

Q&A Process

Solar United Neighbors will act as the point of contact for all solar co-op and RFP related questions on behalf of the co-op members covered under this RFP. Hanna Mitchell will manage all communications. Please submit any questions and/or comments via email to txteam@solarunitedneighbors.org. Proposers that contact co-op members directly for any reason will be disqualified.

What we will disclose to group members about your bid if you are selected

We will disclose this information to the entire group (not the public) about your winning bid:

- Equipment included in the bid.
- Warranties on all equipment and installation.
- Base pricing and key adders.
- System cost examples based on your bid pricing, average sizes and equipment options (noting that bid pricing and component offering is for limited co-op time frame and may not be applicable to non-co-op members).
- Installer contact information and next steps for each homeowner
    - NOTE: If you are selected, we will work with you to clarify this.

[i] These requirements are in line with the Solar Energy Industry Association's described best practices https://www.seia.org/research-resources/installation-best-practices-residential-portfolios