

# Solarize the Valley

2017 Campaign

## Request for Proposals from Solar Installers



This document is a request for proposals (RFP) from the Snake River Alliance (SRA) to solar installers in Idaho to provide design and installations services to pre-qualified residential and commercial customers in Idaho's Treasure Valley. Multiple installers (ideally two) will be selected to provide these services for the 2017 Solarize the Valley campaign. The goals of the Solarize the Valley campaign are to provide residents and businesses with a simple process, affordable products and a positive experience with solar energy and electric vehicle charging equipment. Proposals are due by **March 6th, 2017**.

Solarize the Valley RFP Schedule	Important Dates
RFP Released	Monday, 2/07/2017
Pre-submittal conference for Installers <sup>1</sup>	Monday, 2/27/2017
RFP for Solarize Installers: Proposals Due	Monday, 3/6/2017
Interviews with Installers	03/13/16- 03/17/17
Final Installer(s) selected	Friday, 3/24/2017

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<sup>1</sup> Pre-bid conference to be held at 223 N. 6<sup>th</sup> St (3<sup>rd</sup> floor) at 12:00 to 1:00 PM, Feb 27th  
See [www.solarizethevalley.org](http://www.solarizethevalley.org) for more information.

**Solarize the Valley  
Request for Proposals**

**Posting Date: 02/07/2017  
Proposals Due: 03/06/2017**

**Proposal submissions and all communications regarding this RFP  
must be directed to [solarize@snakeriveralliance.org](mailto:solarize@snakeriveralliance.org)**

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# Overview

Solarize the Valley invites proposals from solar electric (PV) installers (“Installers”) to participate in the Solarize the Valley campaign. One or more solar installers may be selected (“Selected Installers”) to provide services to residential and/or commercial customers participating in Solarize the Valley. Proposers must meet all eligibility requirements described in this RFP. Installers are welcome to submit joint/consortium proposals, providing responsibilities are clearly delineated.

Solarize the Valley is a project of the Snake River Alliance (SRA), one of Idaho’s oldest and most experienced clean energy advocates. The SRA was founded in 1979 in response to nuclear waste issues in Southeast Idaho. With the support of hundreds of members, the SRA has since evolved to be recognized as strong grassroots organization with deep expertise in nuclear and clean energy issues throughout Idaho. SRA’s Solarize Team (herein referred to as the “Solarize Team”) is working with a committed and experienced team of community leaders, industry experts and volunteers. This particular Solarize the Valley campaign will be offered primarily within Canyon County and Ada County in the Treasure Valley.

The Solarize the Valley campaign seeks to address three barriers that keep people from adopting solar:

1. High cost
2. Complexity
3. Customer inaction

To address these barriers, the Solarize the Valley campaign will:

1. Reduce cost of solar installations for all solar participants through reducing the customer acquisition costs and leveraging economies of scale
2. Create a critical mass of educated and engaged potential solar customers through education and awareness
3. Run an efficient short term limited time only campaign

**Completed proposals from eligible Installers that are received by the March 6<sup>th</sup>, 2017, 5 p.m. deadline will be reviewed and evaluated by the Solarize Team as described in this RFP.**

Once selected, the Selected Installer(s) will collaborate with the Solarize Team to roll out a 3-month community marketing and outreach campaign, which is planned to start in April 2016 with the goal of securing 50 contracts for solar installations. Solar installations will continue beyond the outreach period. All leads gained as a result of the outreach campaign will be forwarded to the Selected Installer(s), who will provide the services described in this RFP, including responsive customer service; a transparent pricing/financing structure; and turnkey designs and installation services for participating customers.

Solarize the Valley is designed to reduce installers’ customer acquisition costs and other common barriers to promote greater adoption of solar energy to all Idahoans. The SRA will collect a program fee of 5% of total contract value from the Selected Installer(s) when a residential contract is signed and 2% of total contract value from the Selected Installer(s) when a commercial contract is signed. These fees will go to support staff time and material costs incurred by the SRA in running the Solarize the Valley campaign.

# Solarize Campaign Summary & Responsibilities

This section provides a summary of the Solarize the Valley campaign activities and responsibilities. The success of the Solarize the Valley campaign depends upon the collaboration of the Solarize Team and its partners, the Selected Installer(s), and the participating community members (customers). Below are the high level expected roles and responsibilities of the SRA and the Installer(s):

## Solarize Team (Snake River Alliance)

The SRA will provide program management, lead management (scope to be determined during final negotiations with installers), community outreach, and education efforts across the Treasure Valley. The SRA will recruit and organize a team of committed volunteers to engage community groups, build partnerships with community leaders and help spread the word. We will create and distribute outreach materials and organize special events and information sessions with the support of our selected installers. The SRA will maintain a webpage to educate prospects, drive traffic to that site, and collect basic information for a list of potential customers.

## Installer(s)

Installers are the technical experts responsible for performing site assessments; working with interested customers to design appropriate systems; and contracting with the customer for a turnkey installation. Installers are expected to participate in certain community outreach efforts, events, and workshops as necessary. The chosen installers are also expected to provide qualified leads with solar site assessments and financing information at no cost. Installers may bid on both residential and commercial customers, or may choose to serve only one type of customer.

## Campaign Summary

### Solarize Team Organization and Preparation (Winter 2016 - Spring 2017)

- The SRA organized a core group of individuals responsible for the implementation of the Solarize campaign.
- The SRA formed a Technical Advisory Committee (TAC) to assist with the RFP process and overall strategy.

### Installer Selection (Winter 2017)

- Eligible solar installers interested in participating in the Solarize the Valley: Treasure Valley Campaign should review this RFP, including the **Proposal Requirements** section, and submit proposals to the SRA.
- The SRA, with assistance from the TAC, reviews and evaluates proposals. Interviews are conducted with a short list of proposing installers.
- The SRA chooses one or more Selected Installer(s). Note: Proposing installers may be asked to revise their proposals before selection is finalized.

### Community Marketing Campaign (May 2017 - July 2017) (3 months)

- The Solarize Team, working closely with the Selected Installer(s) to coordinate messaging and activities, will implement a community marketing and education campaign. The campaign will

consist of public meetings and events, media outreach, social media and online marketing, along with other activities to encourage area residents and businesses to sign up before the Sign Up Deadline. (See Attachment A for list of preliminary planned events and activities). The Solarize Team and the Selected Installers may also use other marketing materials and approaches.

- In all marketing and sales materials containing estimates of solar customer savings, the Selected Installer(s) must use the current utility rate for the customer class (e.g. residential, small commercial, etc.), a set escalator rate for predicted utility rate increases, and clearly state these and all other assumptions used.

#### Participant Sign Up, Site Assessments, and Contracting (May 2017 – November 2017)

- Interested residential and business customers will be referred to a dedicated Solarize campaign webpage, which will include information about the campaign, Selected Installer(s), and solar installation process.
- Participants will sign up through an online form on the webpage. These leads will be accessible to the Selected Installer(s) and Solarize Team through an online platform.
- The Solarize Team will provide initial screening of leads to determine which to pass on to the installer for a free site assessment. The screening criteria will be jointly developed by the Solarize Team and the Selected Installer(s) and may include (but is not limited to) the following: 1) verifying the site address, 2) verifying the contact is able to make decisions about the property, 3) is an Idaho Power customer and 4) confirming interest in solar on their roof.
- The Selected Installer(s) will provide free site assessments for all participants who sign up and are deemed a good candidate for solar by the Solarize Team. The criteria for good candidates will be jointly developed by the installer and the Solarize Team. Remote (desktop) assessments may be provided as a first step. Site assessments may be clustered to reduce Installer costs. Participants whose sites are not feasible for solar will be promptly informed, with explanation provided, by the Selected Installer(s).
- Participants whose sites are feasible for solar will be offered the pricing and financing options established in the Selected Installer(s)'s submitted **Profile and Pricing** form.
- The Solarize Team will encourage participants whose sites are feasible for solar installation to sign contracts with the Selected Installer(s) before the **Participant Contracting Deadline**.
- Customers with sites that are deemed feasible for a solar electric installation will have the option to contract with the Selected Installer(s) before the **Participant Contracting Deadline**.

#### Installations (Summer 2017- February 2017)

- The Selected Installer(s) will provide technical expertise, free site assessments, financing options/support, and federal/ state tax information to leads provided by the Solarize team. If the customer is interested, the selected installer(s) will provide turnkey installation, and utility interconnection and commissioning services for eligible and interested participants.
- The Selected Installer(s) will provide a clear list of work to be performed and estimated schedule to all customers.
- The Selected Installer(s) will continue to communicate progress to the Solarize Team on a weekly basis.

# Solarize Timeline

*Please note that dates are estimates and subject to change.*

## Solarize the Valley Timeline

RFP Released	2/07/2017
Pre-submittal conference for Installers	2/27/2017
RFP for Solarize Installers: Proposals Due	3/6/2017
Interviews with Installers	03/13/17 - 03/17/17
Final Installer(s) selected	3/24/2017
Contract(s) signed	3/31/2017
Solarize Launch Event	Week of 4/22/17
Solarize Public Outreach & Education Events	4/22/16 - 7/31/17
Participant Sign-Up Deadline	7/31/2017
Participant Contracting Deadline	11/17/2017
Solar Installations to be Completed	3/1/2018

# Eligibility Requirements

In order to be eligible to submit a proposal, solar installers must adhere to the following:

1. **Experience:** Installer must demonstrate at least two years of experience and proficiency in solar electric installations. Installer must have installed a minimum of 20 total solar electric installations and must have interconnected 10 solar electric systems in Idaho Power's service territory within the last two years.
2. **Implementation and capacity:** Installer must have the ability to provide timely, quality customer service and installations, as well as ability to work well with the Solarize Team. More specifically installers should have the capacity (or the ability to scale) to install 25 rooftop solar NEM PV facilities over the course of 6 months in addition to their normal workflow.
3. **Adequate financial strength:** Solarize is intended to result in a very significant number of installations to the selected installers. Installers should be able to demonstrate sufficient financial strength to successfully carry out this program (e.g. adequate trade credit and cash availability);
4. **Location:** Installer should have a physical presence (i.e. office location) within Idaho.
5. **Licenses:** Installer should hold all relevant licenses and other requirements for the jurisdiction(s) served by the Campaign. Installers must also agree that if at any time throughout the project the applicant's state contractor's license is suspended or terminated all work and or services will immediately cease unless otherwise directed by the Solarize Team. It is the Solarize Team's discretion to determine a course of action following this removal. All leads generated through the Solarize campaign are owned by the SRA, and must be returned to the SRA at time of removal. All employees and subcontractors should have criminal background checks on file with the Installer.
6. **Complete Proposal:** Installer should submit a complete proposal as by 5:00pm on March 6<sup>th</sup>, 2017. Proposals should be emailed to [solarize@snakeriveralliance.org](mailto:solarize@snakeriveralliance.org).

# Proposal Requirements

Proposals must contain the following sections, clearly labeled:

1. **Cover Letter:** Include Solarize RFP Cover Letter (**Attachment B**) signed by authorized company representative on company letterhead. Submit as a PDF file.
2. **Solar Installer Profile and Pricing Form:** Proposers must use the *Solar Installer Profile and Pricing Form* template (**Attachment C**) and submit the completed form as a Microsoft Excel file. Follow instructions within the template and fill in relevant fields in all tabs, including:
  - Firm information and experience
  - Certifications, licenses, and insurance
  - Geographic coverage and service territory
  - Capacity for site assessments and installations
  - Customer references
  - Standard pricing for Solarize campaign
  - Price contingencies (adders)
  - Financing options and partners
  - Equipment specifications (manufacturers, models, and warranties for modules, inverters, racking, and other equipment)
3. **Core Proposal:** Address the key elements of the Proposer's qualifications and services to be provided through the Solarize campaign. The Core Proposal should reference, not repeat, information that is provided in the Profile and Pricing Form. The Core Proposal should not exceed five (5) pages in length and must be submitted as a single PDF document. Clearly label each of the subsections (**bolded**) outlined below:
  - **Installer Experience & Capacity** (3 pages max)
    - *Installer Team Qualifications:* Describe the project team, including, but not limited to, partners assisting in project financing, customer service, outreach, and installations.
      - Installers may provide a joint/consortium proposal, but one Installer must be identified as the lead company, with overall responsibility for the campaign.
      - Highlight relevant experience, skills and capabilities
    - *Financial Strength and Credit Relationships:* Describe and document the state of the financial health of the company and how it will manage the financial requirements of the volume of installations the Solarize the Valley campaign is expected to produce.
      - If your firm utilizes a line of credit or has access to other credit facilities, please describe these and provide the contact information for the lending institutions.
      - If equipment suppliers provide your firm with trade credit, please describe these trade credit arrangements and provide contact information for the suppliers.
    - *Implementation Plan:* The proposal should address the following items related to how the installer can meet the volume and needs of customers in the Solarize the Valley campaign:
      - Ability to provide the full set of required services to the community throughout the Solarize campaign, including ability to provide timely customer service, site assessments, program application submissions, and installation services.



- Ability to begin work immediately upon selection, including providing site assessments to participants who have signed up before the program launch.
    - Ability to ramp up normal installation capacity in order to install 25 rooftop solar NEM PV facilities over the course of 6 months. Describe whether it is anticipated that additional staff will need to be hired.
    - A description of a quality assurance process for the solar electric installations.
    - An outline of the process and timeline for managing assessment, contracting, permits, installations, inspections and the interconnection process with the Idaho Power.
  - *Sites that are not feasible for solar electric:* Outline the criteria in which the installer will deem a home or business not suitable for solar and a process by which the Installer team will handle leads that do not have feasible sites for solar electric. Also discuss any other energy recommendations you may give to customer should solar electricity not be a good solution.
  - *Equipment Selection:* Describe what equipment (modules, inverters, racking) you use and why. Note that Tier 1 PV modules are high preferred.
  - *Additional Energy Equipment:* Describe your interesting and/ or experience in offering additional energy equipment such as electric vehicle charging equipment, smart thermostats, heat pump hot water heaters, etc. as part of solar PV installations. Also please share any thoughts regarding preferred pricing structure for this additional equipment.
- **Pricing Structure & Financing Options** (1 page max)
    - Provide any additional description (beyond what is included in the Profile and Pricing Form) of the proposed pricing and the financing options you will offer to Solarize participants.
      - Include existing relationships with banks or financial institutions, and any other access to financing tools and products.
      - Alternative pricing structures or financial models will be evaluated as appropriate.
  - **Marketing & Customer Screening** (1 page max)
    - Based on your experience installing solar in the Treasure Valley, describe ways in which the SRA can market the Solarize the Valley campaign in order to generate a large number of qualified leads.
      - List any marketing activities that would be uniquely beneficial to the Solarize the Valley campaign in order to create good qualified leads. These may in addition to the marketing activities in Attachment A or, if there are specific marketing activities within Attachment A which you believe would be highly effective or not effective, please describe.
      - Describe lead screening criteria that the Solarize Team can perform (over the phone) in order to provide installer(s) with good qualified leads.

4. **Sales Contract and Customer Proposal Samples:** Provide as a PDF file.

- Sample of an installer's direct purchase contract with the customer, specifying all terms and conditions for a customer under the Solarize Campaign.
- Sample of typical customer proposal/estimate, showing system size, project energy production, and expected financial savings. Customer proposals must clearly state all assumptions, including utility price and utility price escalator.

# Evaluation Criteria

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

- **Installer Experience & Capacity:** Degree of installer's experience, capacity and proficiency in the scope of work, including demonstrated experience in developing, designing and installing solar electric systems and customer service track records; **(35 points)**
- **Price Structure:** Purchase Price (\$/Watt); In addition, the value offered, price adders, price escalators, and contract terms and conditions; **(20 points)**
- **Financing Options:** The quality of the financing options offered to the customer and the installer's familiarity and experience with offering financing. **(10 points)**
- **Marketing & Customer Screening:** Willingness and capacity to creatively market with the SRA team, work well with qualified leads; clarity of proposed customer screening criteria; **(5 points)**
- **Overall Quality and Value to the Customer:** Overall quality of proposal and value proposition to the customer including specified equipment, financing options, warranties, customer service, etc.; **(30 points)**

Each proposal will be evaluated and scored according to the above criteria with up to 100 points achievable. The proposals will be ranked and one or more contractors may be selected based upon their overall score.

# General Conditions

## **Indemnification**

Selected Installer(s) will protect, indemnify and hold harmless Solarize Team Members, and their officers, directors, employees, agents, and affiliates from and against all liabilities, losses, claims, damages, judgments, penalties, causes of action, costs and expenses (including, without limitation, experts' and attorneys' fees and expenses) imposed upon, incurred by or asserted against [Solarize Team Members], resulting from, arising out of or relating to the PV Contractor's work under the Solarize Campaign. The obligations of the PV Contractor under this indemnity will survive the expiration or termination of the Solarize Campaign, and are not limited by any insurance coverage required under this RFP.

## **Limitation of Liability**

Solarize Team Members shall not be liable to the Selected Installer(s) 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.

## **Non-discrimination**

The Selected Installer(s) agrees and warrants that they will not discriminate or permit discrimination against any person or group of persons in any manner prohibited by the laws of the United States or of the state of Idaho;

## **Waiver Authority**

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

## **Confidentiality Statement**

The Solarize Team will keep all information (installer proposals, customer contracts, qualified lead list, etc.) confidential unless otherwise discussed and agreed upon by the Solarize Team and Selected Installer(s).

## **Disclaimer**

This RFP does not commit the Solarize Team to award any funds, pay any costs incurred in preparing an application, or procure or contract for services or supplies. The Solarize Team reserves the right to accept or reject any or all proposals received, negotiate with all qualified applicants, cancel or modify the RFP in part or in its entirety, or change the application guidelines, when it is in its best interests.

## **Program Fee**

The Selected Installer(s) shall pay SRA a program fee of 5% of total contract value on every residential solar contract and 2%% on every commercial solar contract signed between the Selected Installer(s) and customers. These fees will go to support staff time and material costs incurred by the SRA in running the Solarize the Valley project. These fees are due when a contract between the Selected Installer(s) and a Solarize customer is signed and downpayment is made to the Selected Installer and shall be paid to SRA not less frequently than once a month.

## Attachment A: Marketing Activities

To promote the Solarize the Valley campaign, the SRA will host a number of events and lead a variety of marketing activities as shown below. The goal of the effort will be to generate interest from at least 300 customer prospects. These events and activities may include the following:

- Events
  - Community town-hall type events where interested customers can learn about the program throughout the Treasure Valley.
  - Tabling at appropriate events (i.e. Earth Day, May in Motion, SRA events, etc.)
- Materials
  - A strong online marketing package at [www.solarizethevalley.org](http://www.solarizethevalley.org) explaining the Solarize the Valley concept, key deadlines and the value customers can expect from the campaign.
  - Flyers and posters to be used strategically throughout the Treasure Valley.
- Media
  - Maintaining a website for Solarize the Valley and campaign activities to drive prospective customers to register on the site.
  - Leveraging the SRA's ~1,000 followers on Facebook and other social media. (Twitter, etc.)
  - Emailing hundreds of SRA members and supporters about the Solarize the Valley campaign
  - Phone banking to SRA members in the Treasure Valley to encourage them to consider installing solar through the Solarize the Valley campaign.
  - Earning television, radio and newspaper coverage for the Solarize the Valley campaign.
- Community Contact Plan
  - Creating a volunteer committee to coordinate activities across the Treasure Valley to encourage prospects (and SRA members) to consider installing solar through the Solarize the Valley campaign.

# Attachment B: Solar Installer Cover Letter

## Attachment B: Solar Installer Cover Letter Solarize the Valley

The undersigned is the duly authorized representative of the company or entity identified below (the “Company”), with full authority to sign this document and to submit the Company’s proposal pursuant to the Solarize the Valley Request for Proposals (the “RFP”).

I hereby certify:

- The Company is duly organized and in good standing under the laws of the jurisdiction in which it is organized. The financial statements are true, correct and complete and fairly present the financial condition of the Company as of their date. Since the date of the most recent financial statements, there has been no material adverse change in the Company’s financial condition. All tax returns required to be filed in any jurisdiction have been duly filed, and all taxes due in respect of the Company have been duly paid.
- The Company has read the RFP, understands it and is familiar with its requirements.
- The Company meets all of the “Eligibility Requirements” as outlined in this proposal.
- The information contained in this proposal, and any correspondence or other documentation relating to this proposal, are all true, correct and complete. The information disclosed by the Company in this proposal relating to corporate partnerships, affiliations and other relationships is true, correct and complete.
- The Company understands and acknowledges that, until a final selection is made under the RFP, the Solarize Team may enter into discussions with the Company to negotiate the terms of its proposal in an effort to reach the most favorable arrangement for the Treasure Valley community. Moreover, the Solarize Team reserves the right (i) to reject any or all proposals; (ii) to waive defects or irregularities in any proposal; (iii) to discontinue discussions at any time and for any reason; (iv) to correct inaccurate awards; (v) to change the timing or sequence of activities related to Solarize the Valley; (vi) to modify, suspend or cancel Solarize the Valley; and (vii) to condition, modify or otherwise limit the mandate pursuant to the RFP.
- By submitting this proposal, the Company represents and warrants that, if it is selected under this RFP, it will comply with the terms of the RFP and will perform all of the duties and obligations of the “Selected Installer” under the RFP.

Installer: \_\_\_\_\_  
(Printed Name of Installer Organization)

By: \_\_\_\_\_ Title: \_\_\_\_\_  
(Printed Name of Authorized Representative)

Signature: \_\_\_\_\_ Date: \_\_\_\_\_