

REQUEST FOR PROPOSALS

Solar MKE and Solar Shorewood Group Buy Programs Spring 2016 – Fall 2016

INSTALLATION OF RESIDENTIAL SOLAR ELECTRIC SYSTEMS

Date of Issue: March 1, 2016

Proposal Date Due: March 15, 2016 at 2pm CST

Issued By: Midwest Renewable Energy Association

RFP Point of Contact: Peter Murphy, Market Development Coordinator
Midwest Renewable Energy Association
3628 W Pierce St. Milwaukee, WI 53215
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INTRODUCTION

Midwest Renewable Energy Association (MREA) is seeking qualified firms to submit proposals for the design, procurement, and installation of new, residential, direct-owned photovoltaic systems at a per-watt price lower than the typical, single residential installation.

The Solar MKE group buy is being led through a partnership with City of Milwaukee's solar program, Milwaukee Shines, and the MREA. The goal of the Solar MKE group buy is to increase solar education and installations in City of Milwaukee through a group purchase and competitive bidding process.

Solar Shorewood group buy is being led through a partnership between the Village of Shorewood and the MREA. The goal of the Solar Shorewood group buy is to increase solar education and installations in Shorewood through a group purchase and competitive bidding process.

With support from the U.S. Department of Energy's SunShot program, the MREA is coordinating efforts among various Midwest organizations and municipalities to build an open and advantageous solar market that provides long-term benefits to communities. This joint RFP effort between Solar MKE and Solar Shorewood is an example of this cooperation.

BACKGROUND

Milwaukee Shines, the City of Milwaukee's solar program, works to expand solar energy use through a comprehensive, citywide approach. In 2008, the City of Milwaukee was named one of 25 Solar America Cities. *Milwaukee Shines* helps create cleaner air for our community, and helps reduce energy costs for the City and the community at large. *Milwaukee Shines* is a project of the Environmental Collaboration Office (ECO). In 2013, 2014, and 2015 four solar group buy programs were conducted. The first was *Solar Riverwest*. *Solar Riverwest* helped 17 homeowners add solar to their homes at record low prices. The second, *Solar Bay View*, resulted in 38 homeowners adding solar in 2014. The third combined two neighborhoods – *Solar Layton Boulevard West* and *Solar Washington Heights* – and 17 home and business owners installed solar through this group buy program. The most recent iteration of the program focused on Milwaukee's East Side neighborhoods, resulting in 25 home- and business owners installing solar.

Residents of the Village of Shorewood have expressed interest in participating in a group buy and the Village of Shorewood Conservation Committee has requested technical assistance from MREA to administer a local group buy program.

ABOUT THIS RFP

The intent of this RFP is to select one or more firms to provide system design and installation services for eligible participants of *Solar MKE* and *Solar Shorewood*. Proposing firms are invited to submit proposals individually or collaborate with another firm to submit a joint proposal.

As a result of this solicitation, qualified solar installation contractors may enter into a Master Service Agreement ("Agreement") with MREA. The Agreement will set forth the terms and conditions under which a contractor will design, procure, and install residential solar systems for up to fifty (50) *Solar MKE* and *Solar Shorewood* participants. Installations should occur before December 31, 2016.

Additionally, MREA reserves the right to select two contractors to ensure quality customer interaction. To select a contractor, MREA may negotiate with or solicit quotes from one or more contractors qualified under this RFP. Nothing in this solicitation process, RFP, or any contemplated or final agreement relieves any

qualified vendor from complying with all laws and regulations applicable to the agreement.

QUESTIONS RELATED TO RFP

Questions, including requests for explanations of the meaning or interpretations of the provisions of the RFP, **shall be submitted in writing (via email)** to the RFP Point of Contact Peter Murphy at peterm@midwestrenew.org by 3/10/2016 at 4:00pm CST. Questions and answers will be emailed to all RFP respondents as they are received, with no more accepted after 3/10/2016 at 4:00pm CST.

PROPOSAL DUE DATE AND SUBMITTAL

Proposals must be received no later than 3/15/2016 at 2:00pm CST. Proposals must be submitted to Peter Murphy at peterm@midwestrenew.org. All emailed proposals will generate an emailed response within one business day confirming receipt of the proposal. If you do not receive a confirmation email, please call (262) 573-3089.

In order to maintain the fairness and integrity of the selection process, proposals must conform to the requirements of this RFP. All communications shall be through the RFP Point of Contact listed on the RFP Cover Sheet. Communications with members of the evaluation committee for the purpose of unfairly influencing the outcome of this RFP may be cause for the proposal to be rejected and disqualified from further consideration.

ADVISORY COMMITTEE

The selection of the contractor will be made by the Solar Neighborhood Group Buy Advisory Committee. The Committee consists of six (6) members: one representative from the MREA, one representative from Milwaukee Shines, two Milwaukee homeowners who have already installed solar, a resident of Shorewood, and an at-large solar industry expert.

The Solar Group Buy Advisory Committee is responsible for selecting one or more firms to design, procure, and install PV systems for participating residents and small business owners. During the evaluation process, the Advisory Committee has the right to require any clarification they need in order to understand the Proposer's approach.

SOLAR MKE TIMELINE

Participant Registration	April 1, 2016 to August 31, 2016
RFP Announced	March 1, 2016
RFP Questions Due/Posted	March 10, 2016
RFP Proposals Due	March 15, 2016
Firm(s) Selected	March 17, 2016
Participant List Available to Contractor	Ongoing
Bids Provided to All Participants	August 15, 2016
Participants Make "Go" or "No Go" Decision	August 31, 2016
Installations Begin	Ongoing
Installations Completed	December 31, 2016

PROPOSING FIRM REQUIREMENTS

Bidders are responsible for carefully reading all the terms and conditions contained in this RFP and for following the instructions given. Proposals that do not contain all the information requested may be rejected as non-responsive. Bidders must review the entire RFP to ensure that all required information is included in their proposal.

BIDDER QUALIFICATIONS

Bidders must meet the minimum qualifications described in this section to participate. The determination of whether a bidder meets the minimum qualifications will be based on the complete proposal.

Required:

- Proposing firms must be, or contract with, an electrical contractor that must have both State of Wisconsin and local City of Milwaukee licenses.
See details here:
<http://city.milwaukee.gov/MilwaukeeShines/Solar-Professionals/Permitting.htm#.VUJw-JNinhk>
- Proposing firms must respond to each section of this Request for Proposals and use the following outline as a guide for formatting Proposals.
- Proposing firms will provide a group-based pricing structure.
- Installation firms **must** have at least one employee that is a North American Board of Certified Energy Practitioners (NABCEP) Certified PV Installer.

Preference Given To:

- Installation firms that have a Master Electrician on staff.
- Installation firms where the primary place of business located in the City of Milwaukee or Shorewood
- Installation firms that have an online site assessment scheduling tool on the firm's website.
- Firms with an online platform for customers to schedule site assessments.

PROPOSAL SCORING & EVALUATION

The Advisory Committee shall evaluate each proposal based on the categories outlined below. Proposal ranking will be the central evaluation in determining successful applicants and final award. All Proposers will be notified of the outcome of the selection.

CONDITIONS AND RESERVATIONS

MREA and the Advisory Committee are not obligated as a result of the submission of a Proposal to enter into an agreement with any Proposer, and have no financial obligation to any Proposer arising from this RFP. All Contracts will be executed between the home or small business owner and the selected contractor.

The Contract between the owner and the selected firm will state that MREA and Solar Group Buy Advisory Team are not parties to the Contract, and that the selected contractor will be solely liable for any claims, losses or damages arising out of the Contract. The contractor will be expected to sign an Agreement with MREA to confirm each organization's roles and responsibilities prior to work starting.

Furthermore, MREA reserves all rights regarding this RFP, including, without limitation, the right to:

- Amend, delay or cancel the RFP without liability if the team finds it is in the best interest of the project to do so. In the event it becomes necessary to amend any part of this RFP, notice will be provided in the same manner as notice of the original solicitation;
- Reject any or all Proposals received upon finding that it is in the best interest of the project to do so;
- Waive any minor informality or non-conformance with the provisions or procedures of the RFP, and seek clarification of any Proposal, if required;

- Reject any Proposal that fails substantially to comply with all prescribed RFP procedures and requirements;
- Negotiate and/or amend the Scope of Work to serve the best interest of the project

SOLAR MKE & SOLAR SHOREWOOD GROUP BUY 2016 PROPOSAL CONTENT

PROPOSAL FORMAT AND EVALUATION CRITERIA

Please create project proposals in 8½" x 11" document size using a minimum 12 point font size. Proposals should be submitted as one PDF file, or, if multiple files are required, one ZIP file containing the proposal folder and files. Proposals shall not exceed 25 pages, including cover page, cover letter and any appendices and/or attachments.

Proposal Checklist:

- ☐ 1. Cover Letter
- ☐ 2. Firm Profile
- ☐ 3. Qualifications
 - ☐ NABCEP certified staff member
 - ☐ Any Subcontractors
- ☐ 4. Business Practices
 - ☐ Sample Contract
- ☐ 5. Work Quality
- ☐ 6. Customer Service
 - ☐ References
- ☐ 7. Point of Contact
- ☐ 8. Appendix (Optional)
- ☐ 9. Exhibit A
- ☐ 10. Exhibit B
- ☐ 11. Exhibit C

I. Cover Letter

The cover letter shall discuss the highlights, key features and distinguishing points of the Proposal. As part of this discussion, please describe specifically why you want to work with Shorewood and Milwaukee. The cover letter must be prepared and signed by a manager having the authority to make offers and enter into financial agreements on behalf of the firm(s).

II. Proposing Firm Profile

- A. Detail the proposing firm size and local organizational structure. Describe the demonstrated experience of the firm in developing, designing and installing residential and commercial solar electric systems, and how that would apply on a community-wide scale.
- A. Provide a statement describing the firm's capability to complete the project per the project timeline specified above. Include a discussion of the firm's financial stability, number of employees, length of time in business, capacity, and resources. Include any website or marketing support your firm plans to provide for this project.

- B. Explain how the firm can expand quickly—and maintain quality—to meet the large demand that may occur due to this project. Present your plan to accommodate large demand within the timeline stated above. If possible, provide two examples of projects completed to date which have prepared the firm for an undertaking of this scale (potentially 15-35 installations).

III. Qualifications of the Project Team

- B. Identify key personnel for this project including roles, experience, licenses and certificates, with corresponding numbers as appropriate. Key personnel should include at a minimum: Owners; Project Managers; Designers; Installers and Office Manager who will provide data to homeowners per the specifications outlined in the Scope of Work (see Exhibit A). Include NABCEP Certification information here, as well as any Master Electrician or other certified staff involved in this project.
- C. Identify any subcontractors you plan to use, along with their value to the project, and provide background information on size, experience, management, licensing, and subcontracting agreement.

IV. Business Practices

- A. Lead management practices: Describe the process for in-office management of a large volume of leads, scheduling of site assessments and installations, and processing of relevant paperwork.
- B. **Billing practices: Provide a sample customer contract tailored for use with this group buy program that includes a description of your terms of payment, process, and timeline, from initial deposit to final payment.** *(Note: All Contracts will be executed between the home or small business owner and the selected contractor. The Contract between the owner and the selected firm will state that the Midwest Renewable Energy Association or the Advisory Committee are not parties to the Contract, and that the selected contractor will be solely liable for any claims, losses or damages arising out of the Contract.)*
- C. Change orders: Describe how the firm addresses change orders. Please provide an example of a recent change order and how it was priced, tracked, and managed.
- D. Work practices: Address the firm's health and safety record and practices. Identify any communications with Labor and Industries regarding workplace issues in the last 3 years.

V. Work Quality

- A. Explain why the products included in your response to this proposal are appropriate for this project. Provide descriptions of warranties and support that ensure the long-term durability, operation, and maintenance of PV installations. Include performance and reliability figures, in addition to where the products were manufactured.
- B. Describe the installation process, including how you will minimize disruption and disturbance of neighbors, landscaping, structures, and clients' living arrangements during preparation, installation, and clean up.
- C. Describe final testing and sign-off procedures, including punch lists, inspection, and other necessary requirements.

VI. Customer Service

- A. Describe how you plan to handle incident reports (trouble, warranty, service calls, and inquiries). Discuss your typical response time on calls, hours of coverage for customer service calls, and process for providing status reports after an incident is logged.
- B. List any complaints received by the Better Business Bureau over the last 3 years.

- C. Describe the training you provide the homeowner, including materials or manuals, customer care books, and/or support for later questions and system performance.
- D. Provide references from at least 3 recent residential installations including size, date of installation, and location, with a contact name and telephone number.

VII. Working with the Midwest Renewable Energy Association and Solar Group Buy Advisory Team

- A. Identify the main point of contact at the proposing firm. Confirm this individual's ability to provide **weekly progress reports** per the specifications outlined in the Scope of Work (see Exhibit A).

VIII. Appendix

- B. You can provide an Appendix to include any supporting information, such as resumes, references or other data that will support your firm as the best for this project. If present, the Appendix is included in the maximum allowed length of 25 pages for the entire proposal.

IX. Pricing and financing schedule

- A. Using **Exhibit C**, Proposers should present pricing as price-per-watt of installed capacity, exclusive of any eligible incentives or tax credits for a grid-tied system installed on a typical dwelling. The price is to apply to all work described in Scope of Work identified in Exhibit A.
- B. Provide per-watt pricing for each module/inverter combination offered as either a single flat rate or a tiered structure based on the total installed capacity of all systems. If a tiered structure is proposed, it is to be based on four tiers as indicated in Exhibit C: <50kW, 50-100kW, 101-150kW, >150kW. If a single flat rate is proposed, input that rate in all four tiers.
- C. You can provide up to three equipment pricing options in Exhibit C. You do not need to provide three.
 - At least one of the systems you provide cost estimates for must have U.S. made modules.
 - Please also provide the cost estimate of a battery-based system (in the "Additional Cost Factors" section).
 - You must also provide pricing on an Ingeteam inverter to use when the size is appropriate.
- D. Identify any factors or special conditions which would result in additional costs (such as roof materials, roof slope, improvements to existing wiring, roof access) and provide estimates of additional charges for each such factor or condition.
- E. Pricing based solely on specific individual system size will not be considered.
- F. **Note:** Include all your anticipated costs of customer development in this RFP. Customer communication, site assessments, system design and bid development should be factored into the final RFP price.

(There is no charge for homeowners to have a site assessment and bid from the selected contractor – it is all in the final bid price). You must calculate any costs associated with system design and a site visit into your price-per-watt pricing in Exhibit C.

- G. **Note:** You are to include an additional \$0.10/watt to your cost for an Administrative Fee that will be paid to the Midwest Renewable Energy Association for administration, coordination, promotion, meeting expenses and education during the program. **Note:** The MREA will provide each home or business owner with a 1-year complimentary membership. This \$0.10/watt fee will be paid to the MREA after installations are completed. It should be reflected in your bids provided in Exhibit C. (For example, if you are providing a bid cost of \$4.00/watt for install costs, your final cost should actually be \$4.10/watt.)
- H. **Note:** Special considerations are required for placement of solar installations on historic properties in the City of Milwaukee. Please refer to the [Historic Preservation Certificate of Appropriateness](#) worksheet.

- I. **Note:** Installations in the Village of Shorewood require two permits: 1) Conditional Use Permit (\$75), and 2) Electrical Connection permit (\$60). Additionally, the lead time required for the Shorewood Planning Commission is 3.5 weeks. The meetings are always the 4th Tuesday of the month and the Village Planner needs Conditional Use Permit applications 3.5 weeks before that date.

EXHIBIT A

SCOPE OF WORK

The selected firm will provide for design and installation of home and small business solar electric systems for a group of Milwaukee area residents in accordance with the general scope of services outlined below. Proposers may use this outline as a guide for organizing a scope of work for their proposal, but are encouraged to expand upon, refine or suggest alternative approaches based on previous experiences with similar projects.

The purpose of this project is to enable the installation of solar photovoltaic systems on homes and small businesses in Milwaukee and Shorewood at a per-watt price lower than that typically offered by the firm. The selected firm will access cost efficiencies through a program which combines lowered customer acquisition costs with group purchasing and installations.

Between the months of April and August 2016, program partners will promote and deliver educational workshops at easily accessible public locations. As prospective participants are identified who wish to proceed with the process, their names and contact information will be provided to the selected firm. If more than one firm is selected, MREA and the Advisory Committee will refer homeowners to the firms in an equitable manner determined at the time of firm selection.

The selected firm must provide **weekly progress reports** to the Advisory Committee regarding campaign progress and lead status. Progress reports should include the following:

- Contact status
- Date of scheduled/completed site assessment
- Date of contract signing
- Date of scheduled installation
- Date of targeted completion
- Type of system installed
- Size of system installed
- Price of system installed

The selected firm(s) will provide site assessments and system design proposals for each participant free of charge. Individual system designs should be aesthetically pleasing, taking into consideration the preferences of the owner while minimizing project costs and maximizing solar energy production. System proposals should also take into consideration each owner's self-identified financial limitations including, if applicable, any owner-arranged financing with a bank, credit union or other financing entity.

The installations will be carried out by the selected firm in conformance with all applicable laws, codes, and interconnection requirements for net-metered installations in We Energies service territory.

For each participating home or small business, the selected firm will be responsible for:

- securing all required permits,
- completing and submitting all incentive applications,
- scheduling and passing all inspections,

- providing guidance and assistance to each contracted owner with completing a net-metering agreement with We Energies,
- providing each owner with the information, documentation, and signatures required to complete any appropriate Focus on Energy Incentive or Loan Program applications,
- providing each owner appropriate documentation and guidance for applying for the federal residential solar energy tax credit, and
- providing introductions and support materials to banks, credit unions, and other interested financing entities as needed.

	Milwaukee	Shorewood
Permits	<p>In certain cases, the solar project may be eligible for an expedited solar permit. If the project meets the following criteria, the expedited permit can be used which takes the place of the electric and building permits.</p> <ul style="list-style-type: none"> • Solar electric (PV) system of less than 10 kilowatts • 1 or 2 family dwelling • Solar panels are flush-mounted on the roof • Total load is less than 5 pounds per square foot <p>Please use the worksheet to determine if the planned project meets the requirements. If so, the expedited permit can be used. The permit should be completed and submitted by the installer to DCD. The permit may be approved as quickly as the same day if it is brought in-person to the office.</p> <p>Special considerations are required for placement of solar installations on historic properties. Please refer to the Historic Preservation Certificate of Appropriateness worksheet.</p>	<p>Two permits:</p> <ol style="list-style-type: none"> 1. Conditional Use Permit (we negotiated a lower fee of \$75) 2. Electrical Connection permit (\$60).
Lead Time	<p>The permit may be approved as quickly as the same day if it is brought in-person to the office.</p>	<p>The lead time for the Shorewood Planning Commission is 3.5 weeks.</p> <p>The meetings are always the 4th Tuesday of the month and the Village Planner needs Conditional Use Permit applications 3.5 weeks before that date.</p>

EXHIBIT B
BIDDER QUALIFICATION STATEMENT

Bidder Qualification Statement:

I, _____, have read the entire contents of the RFP: Solar MKE and Solar Shorewood Group Purchase Program, and certify that Bidder has necessary purchasing contacts, equipment, storage facilities, experience, ability and capital to furnish the proposed products in the manner described and to perform the required work satisfactorily.

Authorized Signature: _____ Date: _____

Title of Signatory: _____

I acknowledge that Bidder possesses the following certifications: (Check appropriate boxes to indicate compliance.)

- ☐ Certification through NABCEP (required)
- ☐ Primary place of business located within Milwaukee (not required, but preferred).

Authorized Signature: _____ Date: _____

Title of Signatory: _____

Bidder declares the following legal status in submitting this proposal:

- () A corporation organized and existing under the laws of the State of _____
- () A partnership
- () An individual doing business as _____

Company Name FEIN

Address City/State/Zip Code

Bidder's Signature Name & Title

EXHIBIT C

SOLAR MKE & SOLAR SHOREWOOD GROUP BUY PRICING FORM: 2016

Baseline cost per watt price assumes:

1. Cost for major system components (modules, inverter) – must be new. Solar electric modules and inverters must be listed here: www.gosolarcalifornia.ca.gov/equipment/index.
2. Standard racking and mounting hardware and wiring
3. Flush mount systems
4. Cost of complete site assessment/bid for each program enrollee
5. \$0.10/watt Administration Fee which will be paid to the MREA
6. Installation of net metered system
7. The system must include at least a *five-year installation warranty* that covers any defects in the workmanship of the installation at no charge to the owner. The warranty must be provided by the contractor that installs the solar electric system.

What is NOT included in baseline price:

1. Costs related to analysis of any structural improvements that may be needed for a home
2. Electrical work that may be required beyond basic interconnection of solar installation (costs incurred by participant to bring electrical system up to code, for example)
3. Upgrades as requested by the program participant (see below)

EXHIBIT C (cont'd)
SOLAR MKE & SOLAR SHOREWOOD GROUP BUY PRICING FORM: 2016

Proposer Firm Name	
Contact Name	
Contact Email	
Contact Phone	
Date	

BASELINE BID INFORMATION

PV System Equipment Information			Total Participant Capacity (KW)			
System	Modules	Inverter	<50 KW	51-100 KW	101-200 KW	>200 KW
EXAMPLE	Solar World 275W	SMA 4KW Sunny Boy	\$	\$	\$	\$
1						
2						
3						

Additional Cost Factors (if any)	Increased Cost (\$/watt)	Flat Rate Adders (\$)	Description
Batteries (required)			
Roof Material			
Roof Slope			
Electrical			
Access			
Monitoring			
Extended Warranty			
Maintenance Contract			
Microinverters			
Other:			
Other:			
Other:			
Other:			

(Proposing firm may add more rows if necessary.)