

REQUEST FOR PROPOSALS

MadiSUN Solar Group Buy Program 2018

INSTALLATION OF RESIDENTIAL SOLAR ELECTRIC SYSTEMS

Date of Issue: Friday April 20, 2018

Proposal Due Date: Monday May 7, 2019

Issued By: RENEW Wisconsin and City of Madison

RFP Point of Contact: Katherine Klausning, Engagement Manager
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INTRODUCTION

MadiSUN, the City of Madison's solar program, works to expand solar energy adoption through a comprehensive, community-wide approach. This group purchase program is operated by RENEW Wisconsin Inc., a nonprofit organization, on behalf of the City of Madison. **RENEW Wisconsin 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 residential installation.** The goal of the program is to increase solar education and adoption in the Madison area through a group purchase and competitive bidding process. In conjunction with this program, RENEW Wisconsin and the City of Madison are proud to partner with Summit Credit Union to provide a special solar loan program for Madison residents.

ABOUT THIS RFP

The intent of this RFP is to select one or more firms to provide solar photovoltaic (PV) system design and installation services for eligible participants of MadiSUN. The program estimates that it will generate 40 total residential system installations, with an average system size of 5 kilowatts¹. Qualifying installations will occur before December 31, 2018. Proposing firms must focus on Energy Trade Allies and meet all eligibility requirements described in this RFP, including support of the Solar Energy Loan Program explained herein.

As part of its mission to grow and sustain the solar energy industry, RENEW Wisconsin intends to consider selecting multiple contractors to ensure quality customer interaction. While proposing firms are invited to submit proposals individually, collaborative or joint proposals are also encouraged. To select contractors, RENEW Wisconsin may negotiate with or solicit quotes from one or more contractors qualified under this RFP.

In addition, firms are encouraged to offer an optional partnership or referral to a solar-friendly roofing contractor. In prior group buys, the most common barrier to customers installing solar (among homes with good solar access) has been a roof that needs replacing. Firms may opt to propose a partnership with a well-qualified roofing company to serve solar group buy customers.

The selection of the contractors will be made by RENEW Wisconsin, working with a committed team of volunteer advisors. As a result of this solicitation, qualified solar installation contractors shall enter into a Master Services Agreement ("Agreement") with RENEW Wisconsin. The Agreement will set forth the terms and conditions under which a contractor will design, procure, and install residential solar PV systems for participants. RENEW Wisconsin will collect an administrative fee of \$50 for each pre-qualified lead (unshaded and well-oriented roofs, customer understands financial commitment; see Scope of Work for more information) and an additional \$350 for each lead that signs a contract. See below for an explanation of the marketing and lead qualification services to be provided by RENEW Wisconsin. These fees are designed to cover marketing costs and will be shared with community outreach partners.

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 or from complying with any other local laws and regulations applicable to the installation of solar electric systems.

SOLAR ENERGY LOAN PROGRAM IN MADISON

In conjunction with this RFP, RENEW Wisconsin and the City of Madison are proud to partner with Summit Credit Union to provide a special solar loan program for participants. The solar energy loan program helps support solar industry growth by making solar energy improvements affordable to more citizens. Qualified customers may apply for loans of \$1,000 to \$20,000 with low rates and flexible repayment terms of up to 15 years. In order

¹ The 2017 Group Buy Program concluded with 38 homes and an average project size of 5.5kW

to qualify as contractors, proposing firms must agree to support the loan program and work with customers seeking financing to complete all relevant forms and documentation. Because the City of Madison invested in a loan loss reserve fund to help keep interest rates low for this special loan product, the loan offer is only available to City of Madison residents.

CITY OF MADISON 2018 REBATES

In conjunction with the group buy program, the City of Madison will be offering special 2018 rebates, beyond the Focus on Energy program, to qualified group buy customers. These rebates – \$200 per kW DC, up to \$1,000 per household - will be for Madison residential customers who have a good solar resource but whose properties do NOT meet the requirements for a Focus on Energy rebate. Qualifying solar projects would ones that do not meet the requirements for Focus on Energy, but still have an azimuth angle of between 270 – 90 degrees and no more than 15% shading. The rebates will be issued by RENEW Wisconsin and will only be available to Madison solar customers who work with the group buy’s selected contractor(s).

QUESTIONS RELATED TO RFP

Questions, including requests for explanations of the meaning or interpretations of the provisions of the RFP, shall be submitted to Katherine Klausing at Katherine@renewwisconsin.org by May 2nd at 5:00pm CT. Questions and answers will be emailed to all interested bidders as they are received.

PROPOSAL DUE DATE AND SUBMITTAL

Proposals must be received no later than Monday May 7, 2018 at 12:00pm CT. Proposals must be submitted to Katherine Klausing at katherine@renewwisconsin.org, with a copy to MadiSUN@renewwisconsin.org. All emailed proposals will generate a response within one business day confirming receipt of the proposal. Please provide a single PDF document that contains your entire RFP response.

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 here. Communications with members of the advisory 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.

TIMELINE

RFP Announced	Friday April 20, 2018
(Optional) Conference Call for Bidders	Monday April 30, 2018 at 10:00 AM 513-386-0000, passcode 762771#
RFP Questions Due (Last day to submit)	Wednesday May 2, 2018, 5pm Central
Proposals Due	Monday May 7, 2018, 12pm Central
Firm(s) Selected	Friday May 18, 2018
Participant Recruitment and Sign Up	April 19 - September 8, 2018
Participant List Available to Contractor	Monday May 21, 2018
Deadline for Installer to Provide Proposals to Participants	Friday September 20, 2018
Deadline for Installer to Complete Installations	Monday December 31, 2018

SCOPE OF WORK

Services to be provided by RENEW Wisconsin:

Conduct a broad marketing campaign to reach eligible residents in Madison and generate leads. RENEW Wisconsin will issue promotional materials, host a press conference with elected officials, use targeted email marketing and social media, as well as work to generate local media attention. Between the months of May and July, RENEW Wisconsin and other community partners will promote and deliver educational workshops at easily accessible public locations. Promotions may feature the selected contractor(s) while keeping bid details confidential.

- Pre-qualify interested participants by reviewing each roof via publicly available satellite imagery and educating participants about the financial commitments and benefits of solar PV systems. Assessments performed by RENEW Wisconsin are categorized as “Pre-Qualified” or “Disqualified” (based on roof shading, size, shape, orientation) and are not intended to be overly restrictive. The goal is to find the balance between wasting a homeowner’s or the developer’s time and unnecessarily excluding participants. Participants passed along to contractors as “Pre-qualified” leads will have expressed their interest in pursuing a solar system, been educated on the financial commitment, and stated their intent to move forward. Based on performance figures from the 2017 group buy, the 2018 program expects approximately 120 “Pre-Qualified” participants who will receive site assessments and 40 total installations, with an average system size of 5 kW.
- Send new leads to selected contractor(s) as they are pre-qualified, direct new leads to schedule a site assessment and keep a customer tracking sheet up to date. If more than one firm is selected, RENEW Wisconsin will refer homeowners to the firms in an equitable manner determined at the time of firm selection.
- Answer participant questions and support participants and the selected firm(s) throughout the process.
- Invoice firms for pre-qualified leads and signed contracts on a monthly basis.

Services to be provided by the selected firm(s):

- Provide for design and installation of residential solar electric systems for a group of Madison area residents in accordance with the general scope of services outlined in this RFP. Selected firm(s) shall offer a single price-per-watt to all “Pre-Qualified” participants in the program. The selected firm(s) will provide site assessments and system design proposals for each participant. Individual system designs should be tailored appropriately to the site and optimize solar energy production. System proposals should reflect each owner’s financial situation including, if applicable, any owner-arranged financing. The installations shall be carried out by the selected firm in conformance with all applicable laws, codes, and interconnection requirements for net-metered installations in the appropriate electric utility service territory.
- Secure all required permits, complete and submit all incentive applications, and schedule and pass all inspections. The selected firm will assist each homeowner to complete a net-metering agreement with the local utility. The firm will provide each owner with the information, documentation, and signatures required to complete the appropriate Focus on Energy Rebate and Loan application. The firm will also provide each owner appropriate documentation and guidance for applying for the federal residential solar energy tax credit. The firm will provide introductions and support materials to banks, credit unions, and other financing entities as needed.
- Communicate regularly with RENEW Wisconsin and participants. This includes checking the customer tracking document each day and reaching out to new participants as they sign up. New participants must be contacted within a maximum of two business days of being logged on tracking sheet.
- Copy RENEW Wisconsin by email when sending proposals and contracts to participants. This enables the program to answer participant questions as needed, monitor the quality of proposals and track its impacts.
- Provide weekly updates to RENEW Wisconsin’s tracking sheet, including metrics like customer status; Date of scheduled/completed site assessment; Date of contract signing; Date of scheduled installation;

Date of targeted completion; Type of equipment; Size of system; Price of system; Size of Focus on Energy Rebate; Size of City of Madison rebate. This enables the RENEW staff to answer participant questions as needed and track its impacts for the City of Madison.

- Pay RENEW Wisconsin the administrative fee of \$50 for each pre-qualified lead who completes a site assessment and an additional \$350 for each signed contract (for a total fee of \$400 per signed contract) within 30 days of receiving an invoice.
- Complete all work in accordance with the timeline stated in this RFP.

PROPOSAL CONTENT

BIDDER QUALIFICATIONS

Required:

- Firms must be licensed electrical contractors with all required licenses, or contract with a firm that meets these requirements.
- Firms must be familiar with local regulations and must be able to complete all relevant permitting and inspection processes for customers, as well as support the customer to complete utility interconnection agreements.
- Firms must be Focus on Energy Trade Allies and be able to complete all relevant rebate and incentive applications for customers.
- Firms must be willing to participate in the Solar Energy Loan Program with Summit Credit Union and be able to support customers with all relevant loan documentation.
- Firms must provide a single, competitive fixed price (\$/watt) for all participants in the program. Additional charges not included in the fixed price must be explicitly explained in the proposal and should be reserved for unique circumstances.
- **Firms must agree to use an electric rate escalator of no more than 2% per year when estimating project payback for MadiSUN customers²** and use electricity prices consistent with approved tariffs when presenting any proposal or investment calculation. These prices are as follows:
 - For Madison Gas & Electric residential customers on Rg-1, 14.16 cents per kWh in Summer and 13.03 cents per kWh in Winter, as defined and described in tariffs located at: <https://www.mge.com/customer-service/home/elec-rates-res/>. Time of Use rates are also available at this link.
 - For Alliant Energy (Wisconsin Power & Light) residential customers on Rg-1, 11.66 cents per kWh, as defined and described in tariffs located at: <http://www.alliantenergy.com/AboutAlliantEnergy/CompanyInformation/Tariffs/030306>. Time of Use rates are also located at this link.

In addition, as part of the proposal scoring process, preference will be given to:

- Firms that join together to submit a collaborative proposal;
- Firms with at least one employee who is a North American Board of Certified Energy Practitioners (NABCEP) Certified PV Installer;
- Firms with a Master Electrician on staff;
- Firms with socially responsible business practices and firms located in the City of Madison ;
- Firms with an online site assessment scheduling tool.

² Based on Madison Gas & Electric's and Alliant Energy's historic electricity prices, the declining costs of energy, and the 2017 tax reform legislation that will cut utility costs, RENEW Wisconsin has calculated that an appropriate escalator is no more than 2% per year. Firms shall not use inflated utility cost estimates or an escalator of more than 2% per year in any proposals or cost estimates for MadiSUN customers.

TECHNICAL REQUIREMENTS

Photovoltaic Modules must:

- Be listed and reviewed on the California Energy Commission list entitled, '[Incentive Eligible Photovoltaic Modules in Compliance with SB1 Guidelines](http://www.gosolarcalifornia.ca.gov/equipment/pv_modules.php)' (http://www.gosolarcalifornia.ca.gov/equipment/pv_modules.php) or installer must provide similar performance information for the advisory committee from an alternate source, or by referencing a CEC-listed panel from the same product family.
- Have a product warranty of at least 10 years.

Inverters must:

- Be included in the California Energy Commission list entitled '[List of Eligible Inverters per SB1 Guidelines](http://www.gosolarcalifornia.ca.gov/equipment/inverters.php)' (<http://www.gosolarcalifornia.ca.gov/equipment/inverters.php>) 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.

Mounting equipment must:

- Be used in accordance with its manufacturer's listed purpose.
- Be grounded in accordance with manufacturer's specifications.

CONDITIONS AND RESERVATIONS

RENEW WISCONSIN and the MadiSUN volunteer 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 site owner and the selected contractor; RENEW Wisconsin will not be part of these contracts.

The Contract between the owner and the selected firm will state that RENEW Wisconsin and 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. The contractor will be expected to sign an Agreement with RENEW Wisconsin to confirm each organization's roles and responsibilities prior to work starting.

Furthermore, RENEW Wisconsin 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.

PROPOSAL FORMAT & EVALUATION CRITERIA

RENEW Wisconsin and a volunteer Advisory Committee made up of representatives from the community shall evaluate each proposal based on the categories outlined below. Proposal ranking will be the central evaluation in determining successful applicants and final award. Proposals will be scored out of 100 points.

Although the Committee will look for competitive pricing in this RFP, price is not the only factor that the Committee will consider. Participants also value experience in the marketplace, customer service, and quality system components, among other factors. RENEW Wisconsin does not want the MadiSUN program to be a “race to the bottom” in terms of system price and quality, nor should proposers feel they must sacrifice quality in order to be selected. If more than one firm is selected, participating homeowners will be referred to the firms in an equitable manner determined at the time of firm selection.

Please provide a single PDF document that contains your entire RFP response.

All Proposers will be notified of the outcome of the selection.

I. Cover Sheet

The cover sheet should identify the main point of contact at the proposing firm(s) and list contact information, key features of the proposal, and the installed price-per-watt. The proposal should be authorized by a manager with authority to make offers and enter into financial agreements on behalf of the firm.

II. Proposing Firm Profile – 10 points

- A. Detail the proposing firm size and local organizational structure. Include the firm’s office locations and headquarters, number of employees, and length of time in business. 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 in a group purchase program.
- B. Provide a statement describing the firm’s capability to complete the project per the project timeline specified above. Include any website or marketing support your firm plans to provide for this project. Explain how the firm can expand quickly—and maintain quality—to meet the expected demand that may occur due to this project. If possible, provide two examples of projects completed to date which have prepared the firm for an undertaking of this scale (potentially 40 installations).
- C. Describe the firm’s financial position and include any credit relationships that will enable it to take on a project of this size.
- D. Indicate any socially responsible business practices or other community benefits offered by the firm.³

III. Qualifications of the Project Team – 10 points

- A. Identify key personnel for this project including roles, experience, licenses and certificates. Key personnel should include at a minimum: Owners; Project Managers; Designers; Installers and Office Managers who will provide data to homeowners per the specifications outlined in the Scope of Work. Include NABCEP Certification information here, as well as any Master Electrician or other certified staff involved in this project.
- B. 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 – 30 points

- 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. Include the criteria that your team will use to define a “qualified lead” for the program (i.e. roof shading, roof orientation, customer’s financial position, etc.).

³ These could include but are not limited to providing employees living wages and benefits, union labor, sustainable sourcing or green office products, charitable contributions, etc.

- B. Site assessments: Describe your ability to provide an online site assessment scheduling tool for customers⁴.
- C. Permitting and interconnection: Address the firm's experience managing permitting and interconnection requirements in Madison and Middleton. Include the firm's processes and include an estimated timeline for each step.
- D. Financing and incentives: Address the firm's ability to work with Focus on Energy rebates, City of Madison rebates, and the Summit Credit Union Solar Energy Loan Program. Include any experience working with similar programs or any limitations the firm would have.
- E. 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.
- F. 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.
- G. Sales practices: Provide a sample customer proposal tailored for use with *MadiSUN* that includes price and cost savings, estimated system size, output, payback period, and return on investment. This may be included as an attachment.
- H. Billing practices: Provide a sample customer contract tailored for use with *MadiSUN* that includes a description of your terms of payment, process, and timeline, from initial deposit to final payment. This may be included as an attachment. *(Note: All Contracts will be executed between the home or small business owner and the selected contractor(s). The Contract between the owner and the selected firm will state that The City of Madison, RENEW Wisconsin, and 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.)*

V. Work Quality – 10 points

- A. 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 – 10 points

- A. Identify the main point of contact at the proposing firm. Confirm this individual's ability to provide progress updates per the specifications outlined in the Scope of Work.
- B. 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.
- C. List any complaints received by the Better Business Bureau over the last 3 years.
- D. Describe the training you provide the homeowner, including materials or manuals, customer care books, and/or support for later questions and system performance.
- E. Provide references from 2 residential installations including sample proposal, size, date of installation, and location, with a contact name and telephone number. Installations must be from 2016 or later.

⁴ MadiSUN participants should be able to go online and select their site assessment date and time from a menu of options. This is a best practice for solar group buy programs, and there are a variety of different web tools available that can help meet this requirement.

VII. Pricing schedule – 30 points

- A. Using **Exhibit A**, 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 and be available to all participants in the MadiSUN program. This is an estimate and does not represent any guarantee. Selected contractor(s) will enter into an Agreement committing to offer the price to all eligible participants.
- B. You can provide up to two pricing structures in Exhibit A. Your firm must be comfortable with either option. RENEW and its advisory committee will select ONE of the two pricing structures to serve the entire group.
 - One pricing structure must be for a fully fixed price-per-watt of installed capacity, regardless of system size. To aid in the preparation of bids, proposers may reference the program's estimate of 40 total installations, with an average system size of 5kW.
 - (Optional) You may propose a second pricing structure that is based on a customer's system size, but you do not need to.
- C. Indicate the costs for optional upgrades, including American-made modules, optimizers or microinverters, and warranty extension.
- 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. Additional costs not included in the fixed price should be reserved for unique circumstances⁵.
- E. Indicate if your group price for this proposal represents a discount from your typical price and, if so, the level of the discount.
- F. **Note:** Include all your anticipated costs of customer development in your price-per-watt listed in Exhibit A, including customer communication, site assessments, system design and bid development. There shall be no charge for pre-qualified homeowners to have a site assessment and bid from the selected contractor(s).
- G. **Note:** RENEW Wisconsin requires a total administrative fee of \$400 per signed contract, including a referral fee of \$50 for each pre-qualified lead who completes a site assessment (see Scope of Work) and an additional \$350 for each lead who signs a contract. These fees are designed to cover marketing costs and will be shared with community outreach partners. RENEW Wisconsin will also provide each participant with a complimentary membership. Fees shall be paid to RENEW Wisconsin on a monthly basis. The administrative fee must be included in, NOT additional to, the price-per-watt provided in Exhibit A.
- H. **Note:** Special considerations are required for placement of solar installations on historic properties. Refer to the City's [Planning Division \(https://www.cityofmadison.com/dpced/planning/historic-preservation-planning/1589\)](https://www.cityofmadison.com/dpced/planning/historic-preservation-planning/1589) for further guidance.

VIII. Optional – Roofing Solution (5 extra points)

In prior group buys, a common barrier to customers installing solar (among homes with good solar access) has been a roof that needs replacement. A partnership with a well-qualified roofing company that could work with group buy customers can earn your proposal up to 5 extra points. Please identify the firm, a brief overview of their experience and qualifications, and explain how you would work together to serve solar group buy customers.

IX. Appendix

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.

⁵ In addition to reviewing the base price, RENEW will compare each proposers price increase for the specific cost factors and look for overall value. Please indicate how frequently you apply each of the additional cost factors in the "Description" box at the bottom of your pricing form/Exhibit A.

EXHIBIT A - MadiSUN PRICING FORM 2018

Proposer Firm Name

BASELINE BID INFORMATION

PV System Equipment Information			Total Installed Price (\$/watt)
System	Module	Inverter	
EXAMPLE	Silfab 310w	Fronius Primo	\$
1			
2			

Proposers should present one option as fully-fixed 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 RFP and be available to all participants in the MadiSUN program. To aid in the preparation of bids, proposers may reference the program’s estimate of 40 total installations, with an average system size of 5kW. This is an estimate and does not represent any guarantee.

Group price-per-watt includes:

1. Cost for all system components, which meet the technical requirements stated in this RFP
2. Standard racking and mounting hardware and wiring
3. Cost of complete site assessment/bid for each program enrollee
4. \$400 Administration Fee to RENEW Wisconsin
5. Installation of net metered system

Price-per-watt does NOT include:

1. Costs of structural improvements needed for a home prior to solar installation
2. Electrical work required beyond 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)

Optional Upgrades or Cost Factors	Description/Criteria	Estimated Cost Increase
Microinverters or DC Optimizers		
American-made Modules		
Roof Material		
Roof Slope		
Electrical		
Access		
Monitoring		
Extended Warranty		
Maintenance Contract		
Other:		