

## Okaloosa-Walton Solar Co-op RFP

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December 10, 2018

Dear Installer,

Thank you for your interest in our Okaloosa-Walton Solar Co-op! We're excited to issue a Request For Proposal (RFP) on behalf of a group of homeowners in Okaloosa and Walton Counties in Florida. We've worked closely with community stakeholders and volunteers to recruit interested homeowners for this group.

Enclosed please find the official RFP for this solar co-op. We've been organizing solar cooperatives since 2007, facilitating 170 different solar co-ops with thousands of participants, resulting in over 27 MW of contracted residential solar. We've collected data and feedback from participants throughout the process.

Our goal is to help as many homeowners go solar as possible. We also want to help grow a strong, vibrant solar market in the region. By using the lessons learned from previous solar co-ops, we hope to continue to help communities go solar and support the region's growing solar market.

As part of our effort to promote a fair and transparent solar co-op process, below we've outlined (1) our solar co-op program process, (2) some of our lessons learned from previous solar co-ops, and (3) our expectations for installers that are selected by a solar co-op. We want to be as clear as possible about the solar co-op process and what to expect if the Selection Committee chooses your company.

If you have any questions about the process or installer expectations, please don't hesitate to email me at [heaven@solarunitedneighbors.org](mailto:heaven@solarunitedneighbors.org).

We look forward to receiving your submissions!

Best,

Heaven Campbell  
Florida Program Associate  
[Solar United Neighbors](#)



## Solar co-op process

Our solar co-op model involves significant community engagement. Our goal is for homeowners (businesses) to become active, informed solar customers as well as potential solar advocates.

*Even though Solar United Neighbors facilitates the process, solar co-ops belong to their participants and are stakeholder-driven.* Because of this, it is critical for co-op participants themselves to select the winning proposal for each group based on the priorities of the group. We provide technical and administrative support to make this process easier for the group participants who volunteer to participate in the co-op selection committee.

We've broken the solar co-op process down into four phases:

*Phase I: Building the group and homeowner education*

*Phase II: The RFP and selection process*

*Phase III: Proposal and installation*

*Phase IV: Celebration and ongoing support*

*More detailed information about each phase is available here:*

<http://www.solarunitedneighbors.org/for-installers/>

## Lessons learned from previous solar co-ops

Historically, we have seen participant close rates of between 30% and 50%. Our goal with each solar co-op is to have a 50% (or higher) close rate for participants. We've put a lot of time into recruiting and educating the participants and we want to make sure that as many qualified participants as possible move forward with projects.

Our aim is not to interfere with your internal processes, or micromanage how you do business. We have, however, seen very different close rates within solar co-ops. Some of this has to do with the installer's process and approach. Below we've put together some lessons learned that we've found are helpful in getting a high close rate.

Installers with higher close rates:

- Called participants to schedule initial site visits and followed up with emails instead of just emailing.
- Scheduled site visits as soon as possible and provided quick turn-around times for sending proposals to participants (proposals received 1 week or less after site visit).
- Provided participants with a proposal *and* a final contract for signature at the same time (so customer has all information to finalize their decision).
- Had short, concise, and clear email communications with participants. When there's lots of text in a proposal or email, participants stop reading.



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- Let the group know when they would be unavailable, or were experiencing delays. Participants understand delays; they just want to be kept in the loop about when to expect information from installers. We can communicate this to the group as a whole and help manage expectations, too. Just let us know how things are going.
- Maintained organized, updated customer tracking records. We use these records to monitor group progress and respond to participant questions and concerns.
- Communicated with us about difficulties reaching participants. We'll remain involved throughout the process and are happy to reach out to participants to reassure them, encourage scheduling site visits, signing contracts, etc. Just let us know what you need!

### Our expectations

We want to be as clear as possible about the solar co-op process and what to expect if the selection committee chooses your company. The following are some of our expectations when working with an installer chosen by the group.

Expectations include:

- Your designated contact participates in a weekly check-in call with the assigned Solar United Neighbors project manager(s).  
On the call you let us know:
  - Status of the group (number of site visits scheduled, number of proposals issued, number of signed contracts—see tracking sheet for details).
  - Questions or concerns that have come up during your site visits or interactions with customers. This allows us to respond to those questions to the group at large, helping to better educate everyone and saving you time on future site visits. It will help us calm down customers who are concerned.
  - Which participants you have had difficulty contacting. If participants do not respond to you, Solar United Neighbors will reach out in parallel.
  - Any changes in staffing capacity for the week (for example, 2 people will be out of the office for the next three days).
- The customer tracking records are updated in advance of each week's check-in call.
- You are checking each day and reaching out to new participants as they sign up.
- You provide us with a sample copy of your proposal and contract BEFORE it is sent out to participants. This way we can make sure we understand how the information is presented and are able to answer participant questions.
- You copy [heaven@solarunitedneighbors.org](mailto:heaven@solarunitedneighbors.org) when sending proposals to participants. This helps Solar United Neighbors track our impact through metrics like system sizes, estimated production, market investment, etc.
- You pay Solar United Neighbors \$600/signed contract within 30 days of receipt of the monthly invoice. We accept payment by check or ACH (electronic bank transfer).
- 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.

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- We expect you to also let your customers know about Solar United Neighbors and to encourage them to sign up for our [email list](#) as well as refer them to our [website](#) for more information about solar in their state. This will also help you lighten the load of general solar questions you may get. Let us and other solar enthusiasts help instead!

## Okaloosa-Walton Solar Co-op

### Request for Proposal

#### Executive summary

This electronic document represents a Request For Proposals that Solar United Neighbors is issuing on behalf of a group of residential homeowners in Okaloosa and Walton Counties in Florida. We are issuing this RFP with the intent of selecting one project developer (“Proposer”) to provide solar photovoltaic (PV) energy systems for all of the participating homeowners. The participants will select one Proposer to develop all of the projects.

The Proposer will provide a single price/kW installed for the group. This price will be offered to all homeowners participating in the group. The PV projects are to be installed on the property of each of the properties.

The goal of the solar co-op is two-fold: (1) to enable the participants to receive a discount 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.

#### Overall timeline

1. RFP Issue Date: **Monday, December 10, 2018**
2. Proposals Due: by 4:59pm: **Thursday, January 3, 2019**
3. Selection Committee Review: **Week of January 14, 2019**
4. Notice of Intent to Award: **Week of January 14, 2019**
5. Contract Negotiations Completed: **Monday, January 21, 2019**
6. Deadline for new participants to sign up: **Friday March 1, 2019**
7. Deadline (tentative) for all site visits completed: **Friday, March 29, 2019**
8. Deadline (tentative) for all proposals to participants: **Friday, April 12, 2019**
9. Deadline (tentative) for all signed contracts: **Friday, April 26, 2019**

#### Request for proposals scope of work

##### *Services to be provided by Solar United Neighbors*

1. Pre-screen participants by reviewing each roof via publicly available satellite imagery. Assessments performed by Solar United Neighbors are categorized by “Qualified”,



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“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 participants.

2. Recruit participants after selection (see timeline above). We expect the numbers of participants to increase significantly by the end of the project cycle.
3. Support participants and the selected developer throughout the process.
4. Host celebration of successful co-op and public recognition of the work of the installer.
5. Distribute information should any details about the RFP be clarified or changed during the RFP period.

### *Services to be provided by the Developer*

1. A custom proposal for each participant 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 copy [heaven@solarunitedneighbors.org](mailto:heaven@solarunitedneighbors.org) when sending proposals to participants. This helps Solar United Neighbors track our impact through metrics like system sizes, estimated production, market investment, etc.
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 participants
5. Responsive communication and coordination with Solar United Neighbors about group and individual participant 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.
8. For installers that provide brokerage services for SRECs, installer may not obligate participant to sell SRECs to said installer. As long as participant retains ownership of the solar system, participant should be able to select his/her preferred broker, which may include installer. If participant opts for a PPA or leased system, installer may manage SRECs freely.

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## Technical Requirements

### *Photovoltaic Modules must:*

1. Be listed and reviewed on the California Energy Commission list entitled, '[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.
2. 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;
3. Have a product warranty of at least 10 years.

### *Inverters must:*

1. Be included in the California Energy Commission list entitled '[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.
2. 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:*

1. Be grounded in accordance with manufacturer's specifications.
2. Be used in accordance with its manufacturer's listed purpose and specifications.
3. Be used in accordance with manufacturer specifications for waterproofing penetrations
4. Any specific local zoning requirements beyond #2 and #3

## Bid Requirements

Although the Selection Committee will look for aggressive pricing in this RFP, price is **not** the only factor that the Selection Committee will consider. Participants also value experience in the marketplace, quality system components, and strong warranties, among other factors. We do not want the solar co-ops to 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.

**Proposer will offer a single purchase price (\$/watt) for the group of projects.** This price will be offered to all of the homeowners participating in the solar co-op. Developers may not exclude from their proposals any of the participants involved in this RFP. Proposer does not need to provide individualized bids for each homeowner in this initial bid. If selected to develop the group of projects Proposer will provide individualized proposals for each participant.

**Additional charges not included in the \$/watt price must be explicitly explained 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 homeowners are factored

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into the base price, and that an additional charge, if necessary, is reserved for unique homeowner circumstances. We have found that past Selection Committees preferred a single inclusive base price with limited or no additional charges, instead of a lower base price with many additional potential charges. Furthermore, Solar United Neighbors will hold the chosen installer to the bid base price and additional charge prices (or lack thereof).

The Proposer selected by the group will then provide each homeowner with an individual proposal that lists at a minimum (1) the proposed system size for their home, (2) the total price of the proposed system for their home, and (3) the estimated annual production of the system and the resulting percentage of annual electricity consumption the system is expected to produce. Please copy [heaven@solarunitedneighbors.org](mailto:heaven@solarunitedneighbors.org) when sending proposals to participants. The Proposer will then sign a separate bilateral contract with each of the homeowners represented under this RFP.

### Bid Process

A 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 of the projects for the group.

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

1. Once Selection Committee members sign confidentiality agreement, bids will be distributed to selection Committee Members along with a summary spreadsheet created by our staff.
2. Selection committee members will 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 for a brief 10 minute phone or video call during a pre-arranged call window
  - d. Make a final decision on the selected bid

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.

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## Bid Tips

Keep in mind that the bids will be reviewed by a Selection Committee made up of homeowners. While Solar United Neighbors will provide them technical assistance and support as they review bids and make their selection, they do not have a formal background in solar energy topics. We've found the following tips will help homeowners review your bid more easily.

1. Keep the pricing as simple as possible.
2. Keep your answers as short and clear as possible.
3. If available, Proposers are strongly encouraged to provide information about solar financing or leasing opportunities for homeowners participating in this solar co-op.
4. Reach out to the Solar United Neighbors state program director if you are not clear about any step of the RFP process. They will provide information to facilitate the bidding process and help bidders understand the needs and priorities of the specific co-op with the understanding that any information shared is available to all bidders.

## Submission Requirements

We request that Proposers answer all questions in their response to this RFP. Responses will be scored based on the points assigned to each set of questions, with a maximum possible score of 100 points. The scoring of each proposal will be the exclusive discretion of the Selection Committee, but based on the priorities and values of the co-op participants as a whole.

Proposals must be sent to [heaven@solarunitedneighbors.org](mailto:heaven@solarunitedneighbors.org) and be received by **4:59pm on Thursday, January 3, 2019**. Late submissions will not be accepted, so please consider submitting before the deadline to ensure all materials have been received by Solar United Neighbors.

When developing your response to this RFP, please adhere to the following formatting requirements:

- Respond to each question using the Word template provided.
- Provide clear, concise, responses for each question.
- Include spec sheets for each module and inverter type specified
- Include a copy of your standard contract agreement
- Include copy of general liability insurance
- Include copy of applicable jurisdiction licensing certificates
- Include any additional business promotional information, warranties, performance information, etc. at the end of the document after the template response.
- Provide a **single PDF document** that contains your entire RFP response, including all supplementary materials (i.e. Spec sheets, licenses, sample proposals, etc.). Your submission should be a **single PDF document** with no additional attachments.

Solar United Neighbors will attempt to clarify any uncertainties from Proposer bids in the days between the submission deadline and the Selection Committee meeting. However, there are





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occasions where the Selection Committee raises questions that Solar United Neighbors cannot anticipate, and that are not clearly addressed in a Proposer's bid. We therefore ask that the Proposer be available for a phone call the evening of the Selection Committee meeting, should such questions arise. In addition, if the committee selects your bid as a finalist they will contact you and provide an opportunity for you to speak with the group and answer any specific questions they have. Following bid submission, Solar United Neighbors will notify Proposer about the date of the committee meeting.

**Please note** that Proposers must be current and in good standing with both a) past payments to Solar United Neighbors; and b) updated customer tracking data from previous or active co-op groups (including metrics like kW installed and interconnections completed) before new bids will be accepted.

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## Selection Criteria

*\*Please note: The point values below reflect the selection criteria priorities and preferences of the Okaloosa-Walton Solar Co-op participants and will often vary from one co-op to another*

### *Competitive Pricing – [Questions 1 – 10]*

The extent to which proposed pricing terms are competitive.

**[15/21] – 71% of participants**

### *System Quality & Sourcing– [Questions 11 – 13]*

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.

**[15/21] – 71% of participants**

### *Proposer Experience & Qualifications – [Questions 14 – 17]*

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 Okaloosa and Walton County markets a plus.

**[10/21] – 48% of participants**

### *System Warranty – [Questions 18 – 20]*

The extent to which the Proposer offers strong warranties on system components and labor.

**[14/21] – 67% of participants**

### *Social & Community Benefits – [Questions 21 – 23]*

The extent to which the proposed solar PV systems foster social and community development, including hiring Florida-area 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.

**[10/21] – 48% of participants**

### *Battery Storage – [Question 3]*

The number of co-op participants interested in installing a battery storage system along with their solar PV system.

**[9/21] – 43% of participants**

### *Level 2 Electric Vehicle Chargers – [Question 4]*

The number of co-op participants who own or are interested in purchasing an electric vehicle. Indicates the potential demand for installing level 2 electric vehicle chargers.

**[8/21] – 38% of participants**

NOTE: Please respond to this RFP by completing the attached Response Template Word document.

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### 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 participants covered under this RFP. Heaven Campbell will manage all communications. Please submit any questions and/or comments via email to [heaven@solarunitedneighbors.org](mailto:heaven@solarunitedneighbors.org). Proposers that contact participants directly for any reason will be disqualified.



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### What we will disclose to group participants 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
- 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 participants)
- Installer contact information and next steps for each homeowner
  - NOTE: If you are selected, we will work with you to clarify this.

### About Solar United Neighbors

Solar United Neighbors is a community of people building a new energy system and rooftop solar is the cornerstone. We help people go solar, join together, and fight for their energy rights. We are the only organization in the country dedicated to representing the needs and interests of solar owners and clean energy supporters. For a detailed description of our history, please visit our [webpage](#).