# Solar and Battery Storage Co-op RFP Response Template

## Part 1 of 2 – Template Responses

Please answer each of the following questions in this document.

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| [Company name] | | | | |
| Primary contact name | | | |  |
| Primary contact phone | | | |  |
| Primary contact email | | | |  |
| **Competitive Pricing** | | | | |
| 1. | | Provide the base $/W price the Proposer will offer to all solar co-op members including battery storage options. Please note if there is a minimum system size. | | * $#/W – Module X w/ Inverter Y (without storage) * $/W or flat price adder for battery storage * Range and pricing of battery backup options offered   + Options for partial load to full critical load backup?   + $ for lithium Ion   + $ for lead acid or other technology * \*\*Please see ‘battery storage addendum’ at bottom of document to provide more details about storage technology   ***[These are EXAMPLES below – Add/Remove as needed]***   * $/W - Small System Adder for Systems < 3kW DC (min. 2kW) * $ - Electrical Service Upgrade (flat)   + Meter relocation * $/W - Interior conduit run * $/W – Flat or atypical roof installation (canopy/ground mount) |
| 2. | | List any optional upgrades to system components and services. | | ***[These are EXAMPLES – Add/Remove as needed]***   * $#/W – High efficiency module * $#/W – American made * $#/W – Microinverters/optimizers |
| 3. | | (Optional) Some members this co-op have expressed interest in a level 2 EV charger. Do you offer installation of EV chargers? | | ***[These are EXAMPLES – Add/Remove as needed]***  YES/NO |
| 4. | | Please quantify Proposer’s experience with  batteries (number of commercial and/or  residential PV + storage installations).  NOTE: Almost all members have expressed interest in adding battery storage**. Please answer all questions in the Battery System Addendum as well.** | | * [Yes/No] Do you have experience with grid-tied PV-based battery systems   + # of installations   + Types of certifications (i.e Tesla, LG Chem etc.) * [Yes / No] Do you have experience adding a battery retrofit to an existing system? * Would you be willing to provide battery retrofits to PV existing systems that your company did not install (Yes/No) |
| 5. | | Will you offer loan financing to co-op members?  The group has partnered with several credit unions (‘cooperativas’) to offer special financing to co-op members. If selected are you willing to sign an agreement with the credit unions, so that participants can take advantage of the special financing? | | * [YES/NO] * Specify loan products and applicable terms * Willing to sign agreement with credit union for special financing {YES/NO} |
| 6. | | Will you offer a Power Purchase Agreement or lease to co-op members? | | * [YES/NO] * Specify starting $/kWh price, percentage escalator, length of the contract, ESCO or other regulatory certifications if applicable |
| 7. | | Ability to process or provide any additional incentives to benefit group members. | | * [YES/NO/NA] |
| 8. | | Will you register and certify the co-op members’ systems with appropriate entities (PREPA, OgPE, and other regulatory bodies)? | | * [YES/NO/NA] |
| 9. | | Experience and procedures in place for PREPA design and interconnection approval.  Will there be any additional charges for securing historic permits, HOA approvals, or other permits or approvals that go above and beyond normal permitting requirements?  **NOTE**: We recognize historic permitting incurs additional cost and want to ensure your costs are covered. If additional charges are required be sure they are listed in the added cost section. | | * Would you process through expedited registration process or regular PREPA evaluation? * Anticipated timeline for system approval.   + Procedure to address infrastructure change requests by PREPA? * Additional charges? * Other experience [optional] |
| 10. | | Will Proposer be able to remove and reinstall the original PV installation should a co-op member require roof repairs or replacement at a later date independent of Proposer’s PV installation? If so, please specify at what cost to the co-op member. | | * [YES/NO] * Cost * Duration available |
| 11. | | What are your standard milestone payments for a signed contract?  **NOTE**: The Selection Committee will look favorably on milestone payments that include a final payment after receipt of permission to operate from the utility. | | ***[These are EXAMPLES – Add/Remove as needed]***   * X % at milestone 1 (example: contract signing) * X % at milestone 2 (example: equipment order) * X % at milestone 3 (example: inspection) * X % at final interconnection (permission to operate) |
| **System Quality & Sourcing** | | | | |
| 12. | List all model names/numbers of equipment and components Proposer intends to install including panels, roof attachments, type of racking system, and type of inverters. If you offer multiple options for panels (i.e. American-made vs. not American-made), inverters (i.e., central inverters vs. micro-inverters) or roof attachments/racking, please specify components and attachment methods used for each option. | | | ***[These are EXAMPLES – Add/Remove as needed]***   * American Made Module X, Model #, Details, Made in USA * High Efficiency Module Y, Model #, Details, Made in China * Inverter Z, Model #, Details * Racking System Q, Details |
| 13. | Describe the equipment and methodology used to weatherproof all roof attachment points made during installation. | | | ***[These are EXAMPLES – Add/Remove as needed]***   * Flashings * Pitch pockets (flat roof) * Racking meets current Puerto Rico wind loading requirements?   + Specify wind load rating for racking.   NOTE: If you are using a flat roof parapet mounting system please describe in detail how parapet attachment points are weatherproofed. |
| 14**.** | Will installed systems include monitoring and at what level (system wide or panel level)? How much will monitoring services cost?  **NOTE:** If monitoring charges are not included in the base pricing, be sure they are listed in the added cost section. | | | * [YES/NO] * Cost |
| 15. | Do you have a long-standing relationship with any included equipment manufacturers or distributors? | | | * [YES/NO] * Details |
| **Proposer Experience & Qualifications** | | | | |
| 16. | | Provide three (3) customer references and their contact information from customers who worked with Proposer during the installation phase. If you are bidding with battery options, at least one (1) customer reference must have worked with Proposer for a battery storage installation | |  |
| 17. | | Do you offer roofing services in house? If so, are they sub-contracted? How long have you offered roofing services? If you partner with roofing companies, please provide roofing company’s information and experience with roof repair/replacement in conjunction with solar PV installation. | | * In-house roofing services? - [YES/NO]   + Sub-contracted? - [YES/NO] * Roofing Partner - [YES/NO]   + Details   + Experience |
| 18. | | Please describe the company’s key personnel and certifications **who will be working directly on this co-op and an estimate of time to complete work**. Also describe your staffing plan and provide staff names for key roles.  **NOTE:** Our goal is to understand how your organization will staff and coordinate a large group of leads in a short time frame. | | * Do you have a backlog of work, or can you start working on this co-op immediately? * When do you anticipate having all site visits and proposals completed for the group at its current size? * How soon after receiving a customer’s signed contract will the physical installation begin? * Key company personnel * Key certifications and who holds them (NABCEP, RISE, Professional Engineer (PE), Master Electrician’s License, other State-required licenses) * Number of full-time employees dedicated to co-op * Number of part-time employees dedicated to co-op * Number of employees working part-time on co-op * Staffing Plan & contact info for each staff member:   + Customer communication   + Solar United Neighbors communication (weekly calls and Salesforce CRM database updates)   + Site visit scheduling   + Site visits   + Installation   + Administrative work |
| 19. | | Please provide company information & experience.  **NOTE:** Please provide answers to ALL the bulleted points. | | * Number of years in business? * Number of years installing PV systems? * Are you a B-Corp or other social benefit organization? * Number of employees? * How many new employees have been hired in the last year? * Are you a member of your local SEIA chapter or other professional organizations? * Amount of general liability insurance? * Amount of worker’s compensation insurance? * State and local licensing numbers * Total number of installs completed in the last two years * Number of installs in the jurisdictions applicable for this group * Additional information on the company’s experience, standing and stability |
| **System Warranty** | | | | |
| 20. | | Describe production and product warranties provided for system modules.  NOTE: Refer to the “Technical Requirements” section of the RFP | | ***[These are EXAMPLES – Add/Remove as needed]***   * Module model X   + Product warranty = 10 years on all defects   + Production warranty = 25-year linear warranty to 80% of rated capacity |
| 21. | | Describe warranty provided for inverters and options for extending the warranty. | | ***[These are EXAMPLES – Add/Remove as needed]***   * Inverter Y   + Product warranty = 10 years   + Extendable to 20 years |
| 22. | | (Optional)Describe warranty provided for level 2 EV chargers. | | ***[These are EXAMPLES – Add/Remove as needed]***   * Level 2 charger X   + 3-year product warranty |
| 22. | | Describe product warranties provided for system batteries and if applicable battery-based inverters/charge controller | | ***[These are EXAMPLES – Add/Remove as needed***   * Battery model X   + Product warranty = 5 years on all defects   + Extendable   (if not included as part of unit or for DC coupled system)   * Battery Based Inverter   + Product warranty = 5 years on all defects   + Extendable * Charge Controller   + Product warranty |
| 23. | | Describe warranty provided for Proposer’s labor and workmanship. Give details for roof penetration warranty.  Do you provide maintenance and service plans?  **NOTE**: please indicate whether Proposer offers an electrical production/performance guarantee. | | * Workmanship warranty * Maintenance and service plans (standard/extended)   + Do you provide any maintenance or general service plans for systems your company did not install? |
| **Covid Response** | | | | |
| 24. | | | Provide a summary of health and safety protocol for interacting with customer’s homes during the Covid-19 outbreak. |  |
| **Social & Community Benefits** | | | | |
| 25. | | Provide location of your nearest office | |  |
| 26. | | Please answer each question at right with respect to your inclusion, diversity and fair wage practices. | | * Do you make any significant efforts to offer employment opportunities to women, residents from unemployed or underemployed communities, including qualified individuals with criminal records? * Please specify what policies you have in place to ensure hiring on the basis of merit and in accordance with fair employment laws.\* * What percentage of your staff are people of color? * What percentage of your staff are women? * Do you offer programs (job training, internships etc.) to benefit the communities in which you operate? |
| 27. | | Please describe any commitments you have made or are willing to make regarding local engagement if you are chosen to service the group. For example, companies previously chosen offered job internships, solar job training programs, donated to local nonprofits and planted trees. etc. | |  |
| \**In accordance with Title VII of the Civil Rights Act of 1964, the selected installer shall not discriminate on the basis of race, religion, national origin or sex. In accordance with U.S. Equal Employment Opportunity Commission (EEOC) guidance on Title VII, the selected installer shall not have a blanket policy against hiring individuals who may have convictions on their record but shall have in place a fair and equitable hiring/employment policy that takes all relevant factors into account when making employment decisions.* | | | | |

**Battery System Addendum Questions**

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| 1. | List all model names/numbers of equipment and components Proposer intends to offer.  This includes:   * all types of batteries * inverters/charge controller (For DC coupled) | ***[These are EXAMPLES – Add/Remove as needed]***   * Battery X, Model #, Details (chemistry) * SolarEdge, Model #, Details (chemistry) * SMA, Model #, Details * Tabuchi America, Model #, Details * Magnum, Model #, Details, * Outback, Model #, Details, * Xantrex, Model #, Details * LiFePO4 chemistry option * Inverter Z, Model #, Details |
| 2. | Will you be able to retrofit existing solar systems to add battery storage? If yes, are there any additional costs to retrofit systems not originally installed with battery ready wiring/inverters? If so, please specify equipment and breakout cost to the best of your ability.   * We note that storage systems are custom and vary based on site specific considerations. We will communicate this to clients and set up reasonable expectations regarding cost, installation timeline, and maintenance monitoring. | ***[These are EXAMPLES – Add/Remove as needed]***  ***[Yes / No]***   * Installation labor, cost (range or hourly rate is OK) * Additional disconnect, cost * Panel upgrade, cost * Inverter swap, cost * Recycle value of inverter if inverter swap is needed: * Can battery systems be interfaced with existing monitoring software of solar system? [Yes, No] * Do you charge a design fee up-front? [Yes, No]   If Yes, Design fee: |
| 3. | Will your work affect warranties if there is an existing solar array on site? | * YES/NO   Explanation. |
| 4. | Will the battery installation include an energy management/monitoring system? If so, what is the cost? | * [YES/NO] * Energy management system cost (one-time or recurring?) |
| 5. | Does the installer or supplier have a battery storage presale checklist to offer the customer? (in order to set expectations and identify critical loads and electrical devices that will be run by batteries). Please also include any related examples as an attachment.  Will you work with customers to help register any paperwork required to honor warranty?   * Permitting jurisdiction * Equipment manufacturer | * [YES/NO] * [YES/ NO] |
| 6. | Do you expect any delays in sourcing any of the storage equipment you’re offering? If so, what equipment and at what timeline?  How does your storage system installation timeline compare to a standard grid tied system (1 month/weeks etc.?,)  Replacement Procedure: With future upgrades and battery system component replacements, will system owner have any foreseeable issue sourcing an individual component? i.e. are there components that can only be replaced by one supplier? | * [YES/NO] * Details * Solar + Storage timeline: * Storage Retrofit timeline:   [Yes / No?   * Details |

## Part 2 of 2 – Additional Required Documentation

In addition to submitting this completed template (in Word), please also provide a **SINGLE** PDF that includes the following documentation:

* Spec sheets for each module, inverter type, and storage system specified
* Certificate or other proof that equipment is rated for use in Puerto Rico
* Copy of your template sales proposal (if different than your contract)
* Copy of your standard contract agreement
* Copy of general liability insurance
* Copy of applicable jurisdiction licensing certificate(s)
* Copy of your standard contract language covering your installation and roof penetration warranties

Optional content to be included at the end of the document:

* Any additional business promotional information, warranties, performance information, product certifications, installation examples, etc.