



Plano Solar Co-op RFP

Monday, March 11, 2024

Please Note: We've implemented a new submission process using RFP360 software. Please go to the link below to create an account on RFP360. All questions must be completed to submit a response. Please SAVE your work throughout the submission process.

Submit a response to our Plano Solar Co-op RFP here:

<https://my.rfp360.com/public/rfp/c54c41aa-d25b-4438-bda3-d400878e9d64>

For general guidance on the platform, please refer to [this recording of an RFP360 Training Session](#) or our [step-by-step guide](#). If you have any additional questions, please contact us at TXteam@solarunitedneighbors.org. We would be happy to schedule a meeting during the week of March 11. Please add this email address to your contacts to avoid our correspondences going to spam.

Dear Installer,

Thank you for your interest in the Plano Solar Co-op! We're excited to issue a Request For Proposal (RFP) on behalf of a group of approximately 15 homeowners and small businesses in Plano, Texas. We've worked closely with community stakeholders and volunteers to recruit interested homeowners for this group.

We are issuing this RFP with the intent of selecting one company ("Proposer") to provide solar photovoltaic (PV) energy systems, level 2 EV chargers and optional battery backup or retrofits for the participating homeowners and businesses. The Proposer will provide a single price/kWh installed for the group and an installed price for level 2 EV chargers. If the Proposer offers battery backup or battery retrofits, the Proposer will provide price ranges for installation, equipment, and design offered to homeowners and businesses participating in the group.

The goal of the solar co-op is two-fold: (1) to enable the co-op members to receive competitive pricing on their solar, EV charger, and battery systems by proceeding as a group, and (2) to provide the project developer with an extensively pre-screened and well-educated group of customers.

Plano Solar Co-op Timeline

1. RFP Issue Date: Monday, March 11
2. **Proposals Due: Monday, March 25 by 5pm CST**
3. Selection Committee Review: Thursday, April 11
4. Notice of Intent to Award: Week of April 15
5. Installer Award Agreement Completed: Week of April 15
6. Deadline for new co-op members to sign up: Friday, April 26
7. Deadline (tentative) for all site visits completed: Friday, May 10
8. Deadline (tentative) for all proposals to co-op members: Friday, May 24
9. Deadline (tentative) for all signed contracts: Friday, June 7



Plano Solar Co-op RFP

We are working to help as many homeowners go solar as possible. We also want to help grow a strong, vibrant solar market in the region. We've been organizing solar cooperatives since 2007, facilitating 410 solar co-ops nationwide with thousands of co-op members, resulting in over 71MW+ of contracted residential solar.

If you would like to submit a response to this RFP, please go to the link below to create an account with RFP360. If you already have an account with RFP360, use that to access the RFP response portal. Proposals are due by submission through RFP360 on Monday, March 25 by 5pm CST (Late submissions will not be accepted).

NOTE: If you plan to respond to more than one SUN RFP announcement, this software will let you save and re-use your responses for easier preparation and submission next time!

Submit a response to our Plano Solar Co-op RFP here:

<https://my.rfp360.com/public/rfp/c54c41aa-d25b-4438-bda3-d400878e9d64>

Below you will find additional information and requirements for compiling a compelling proposal. If you have any questions about the process or expectations, please don't hesitate to email. Please see the document on the last page for guidance on commercial, non-profit and large systems as part of the co-op.

We look forward to receiving your submissions!

Best,

América García
TXteam@solarunitedneighbors.org
Texas Program Director
Solar United Neighbors



Plano Solar Co-op RFP

Scope of work

Services to be provided by Solar United Neighbors

1. Pre-screen co-op members by reviewing each roof via publicly available satellite imagery. Assessments performed by Solar United Neighbors are categorized by “Qualified”, “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 co-op members.
2. Recruit co-op members after selection (see timeline above). We expect the numbers of co-op members to increase significantly by the end of the project cycle.
3. 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.
4. Support co-op members and the selected developer throughout the process.
5. Host celebration of successful co-op and public recognition of the work of the installer.
6. Distribute information should any details about the RFP be clarified or changed during the RFP period.

Services to be provided by the Proposer

1. A custom proposal for each co-op member 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 provide us the first three (3) proposals you send to co-op members.
2. In person (or virtual conference) 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 includes solar, solar + EV charger, solar + storage, and battery retrofit contracts. Contracts for EV chargers only (without solar) will be at \$75/signed contract. 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 members.
5. Responsive communication and coordination with Solar United Neighbors about group and individual co-op member 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. In addition to the SEIA Code, Companies shall abide by the law and all applicable ethical business guidelines set forth by the Council of Better Business Bureaus (BBB), Federal Trade Commission (FTC), Consumer Financial Protection Bureau (CFPB), relevant state consumer protection bureaus, and other regulatory bodies with jurisdiction.



Plano Solar Co-op RFP

Bid Requirements

- **Offer a single purchase price (\$/Watt) for all co-op members.**
 - This price will be offered to all homeowners (and businesses) participating in the solar co-op.
 - You may not exclude from your proposals any of the co-op members involved in this RFP.
 - You do not need to provide individualized proposals for each homeowner in this initial bid. If selected to develop the group of projects Proposer will provide individualized proposals for each co-op member.

- **Explicitly state any additional charges not included in the \$/Watt price 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 co-op members are factored into the base price, and that an additional charge, if necessary, is reserved for unique circumstances.

- **Consider all selection criteria when preparing your proposal.** Although the Selection Committee will look for aggressive pricing, price is **not** the only factor they will consider. Participants also value experience in the marketplace, quality system components, and strong warranties, among other factors. Solar co-ops should not be a “race to the bottom” in terms of system price and quality, nor do we want proposers to feel they must sacrifice quality to be selected.

- **Bid with PV modules that:**
 - Are listed and reviewed on the California Energy Commission list, '[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.
 - 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;
 - Have a product warranty of at least 10 years.

- **Bid with inverters that:**
 - Are included in the California Energy Commission list '[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.
 - 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 microinverters and 10 years for string inverters.



Plano Solar Co-op RFP

- **Utilize mounting equipment that is:**
 - Grounded in accordance with manufacturer's specifications.
 - Used in accordance with its manufacturer's listed purpose and specifications.
 - Used in accordance with manufacturer specifications for waterproofing penetrations.
 - Meets any specific local zoning requirements beyond #2 and #3.
- **Level 2 EV chargers must:** Be UL or ETL certified.
- **Meet the following licensing requirements:**
 - Proposer submitting the bid is licensed to operate within Texas.
 - Proposer submitting the bid is a licensed TDLR electrical contractor.
 - Proposer submitting the bid must be a staff member of the solar company who would receive the work.
 - NOTE: Bids from third party sales representatives will not be accepted.
- **Meet the following insurance requirements (for proposer and any sub-contractors):¹**
 - General liability - \$1,000,000 per occurrence, \$2,000,000 in aggregate.
 - Worker's compensation - \$1,000,000 each accident, each employee, policy limit.
 - Automobile liability - bodily injury, death, and property damage combined single limits of at least \$1,000,000 per occurrence covering vehicles owned, hired, or non-owned.
 - NOTE: Official proof of exemption by applicable jurisdiction for any above insurance requirements for a company is also acceptable.

Have you worked on a Solar United Neighbors co-op before?

To be eligible to submit a proposal for this co-op, you must:

1. Have no overdue invoices for past solar co-op work.
2. Have updated all customer tracking data for active or completed co-ops (including kW installed and interconnection completed dates).
3. Have completed initial contacts, site visits, and individualized proposals for the majority of any existing co-op you are currently working on.

Solar United Neighbors reserves the right to deny any proposer's bid due to overdue payments, lack of proper licensure for applicable jurisdictions, or outstanding co-op member grievance yet to be resolved.

¹ These requirements are in line with the Solar Energy Industry Association's described best practices <https://www.seia.org/research-resources/installation-best-practices-residential-portfolios>

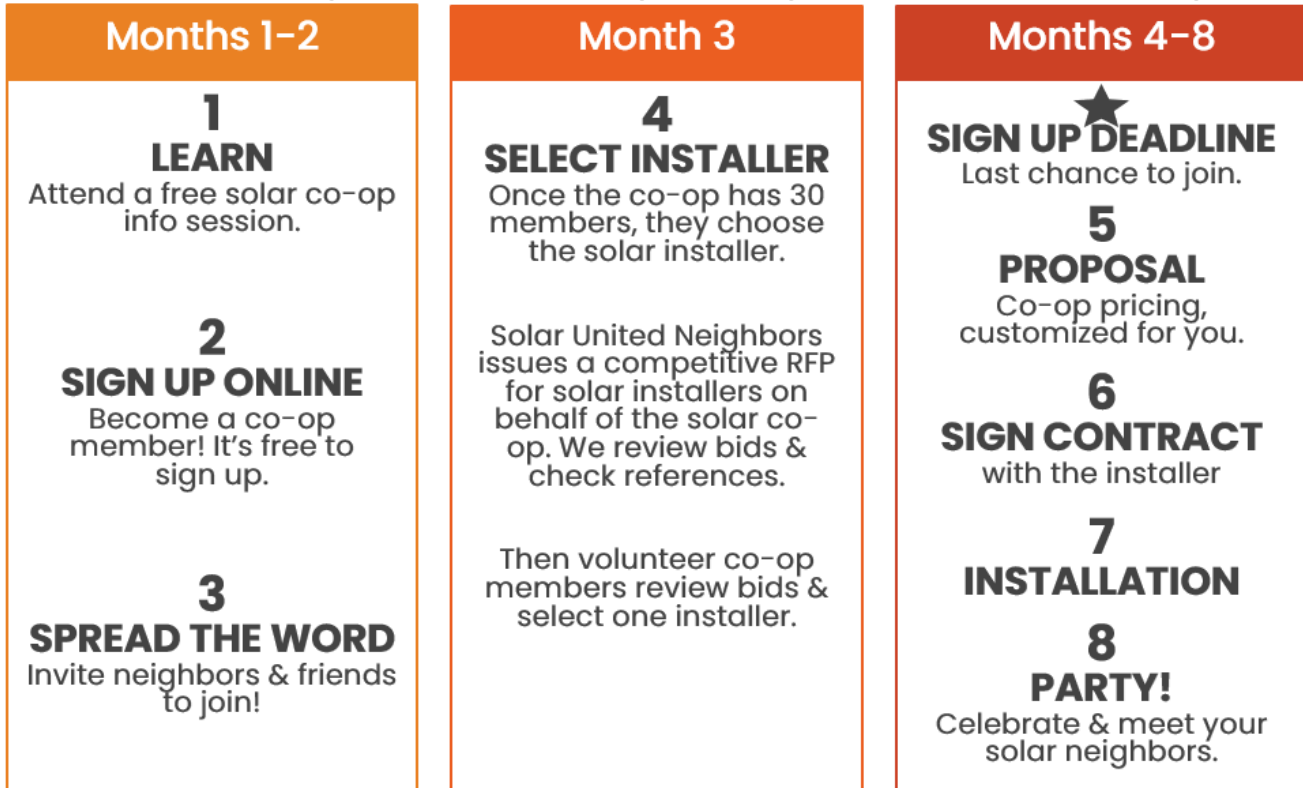


Plano Solar Co-op RFP

Useful Info

How a solar co-op works

A solar co-op is when a group of homeowners goes through the solarization process together.



More detailed information about each phase is available here:

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

How a co-op selects an installer

After all interested installers have submitted a proposal in response to this Request for Proposals, Solar United Neighbors will convene a selection committee of co-op members. This 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 the projects for the group.

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

1. Once Selection Committee members sign the confidentiality agreement, bids will be distributed to Selection Committee members along with a summary spreadsheet created by our staff.
2. Selection Committee members may review bids independently before meeting as a group.
3. Committee members will convene one evening to review all bids and select an installer. During that meeting they will:



Plano Solar Co-op RFP

- a. Discuss each bid.
- b. Select finalists.
- c. Contact the designated bid representative for each finalist **if** a bid component needs clarification. The committee may decide not to contact finalists if no clarification is needed.
- d. Select a winning company to serve the co-op.

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.

Selection Criteria

**Please note: The "importance" column below reflects the selection criteria priorities and preferences of the co-op members and will often vary from one co-op to another.*

<u>Category</u>	<u>Description</u>	<u>Importance</u>
<u>Offers the best price</u>	The extent to which proposed pricing terms are competitive.	18/23 (78%) members indicated as important.
<u>Uses higher quality equipment</u>	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.	17/23 (74%) members indicated as important.
<u>Has more experience</u>	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 Plano market a plus.	10/23 (43%) members indicated as important.
<u>Offers stronger warranties</u>	The extent to which the Proposer offers strong warranties on system components and labor.	17/23 (74%) members indicated as important.
<u>Are a local company/woman or minority-owned business</u>	The extent to which the proposed solar PV systems foster social and community	9/23 (39%) members indicated as important.



Plano Solar Co-op RFP

	development, including hiring local workers, and offering local job training opportunities. Preference will be given to locally owned companies.	
Please take note of these non-solar offering questions:		
<u>Battery Storage</u>	Number of members interested or potentially interested in battery storage.	10 members indicated interest. 12 members indicated potential interest.
<u>Level 2 Electric Vehicle Chargers</u>	Number of members interested in installing a level 2 EV charger.	8 members indicated interest.
<u>Financing</u>	Number of members considering financing.	5 members indicated interest. 12 members indicated potential interest.

Summary of members

Use the following information to further refine your product offering:

Roof types:

- Asphalt shingle: 19
- Metal: 0
- Rubber membrane: 1
- Unknown: 3

Location:

- Plano: 20
- Carrollton: 1
- Sachse: 1
- Wylie: 1

Roof ages:

- Less than 10 years: 15
- Less than 15 years: 4
- More than 15 years: 2
- Unknown: 2

Installation type:

- Rooftop: 18
- Ground mount: 0
- Both possible: 5

Build status:

- Reroof planned before solar: 3
- Pre-construction: 0
- Construction: 0

Property type:

- Single family: ~23



Plano Solar Co-op RFP

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 process 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 an initial site visit and followed up via email instead of only emailing.
- Reach out to selection committee members early—they are often the first signed contracts.
- Use the co-op as a “special offer” to lost leads in the co-op area, directing them to our sign-up page so they have support and education that can help to convert to a signed contract.
- 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 the 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.
- 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.

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 co-op members covered under this RFP. América García and Trinity Dearborn will manage all communications. Please submit any questions and/or comments via email to TXteam@solarunitedneighbors.org. Proposers that contact co-op members directly for any reason will be disqualified.



Plano Solar Co-op RFP

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

Commercial, non-profit, and large systems

Solar Co-ops are mostly made up of residential customers but may include some small businesses, non-profit organizations, churches and other larger than residential systems.

At Solar United Neighbors, we realize that commercial projects may be priced differently and are often custom or cannot be completed within the timeframe of the solar co-op. Due to the complexity of the projects, this can result in a higher price per Watt due to permitting or sometimes a lower price per Watt for larger installations.

If a lower price per Watt is available for the customer than the co-op pricing, feel free to include this price in the customer's proposal. The solar co-op is not meant to get in the way of you making a sale.

If higher pricing is required due to the complexity of the project, including but not limited to engineering upcharges or meter issues, we expect that you honor the spirit of discounted pricing you are providing for residential customers for any commercial customers in the group.