



REQUEST FOR PROPOSALS

FOR THE GROUP PURCHASE OF RESIDENTIAL SOLAR ENERGY SYSTEMS

Olympia Community Solar is seeking proposals to support a group purchase of solar installations for a Solarize Campaign. The goals of the Campaign are to accelerate solar adoption, reduce customer acquisition costs, and save customers money. This Solarize Campaign will target residents and businesses within the **City of Kenmore and Thurston, Mason, Lewis, Skagit, Island, Whatcom, and Walla Walla Counties**. Olympia Community Solar will work with our partners to motivate hundreds of households and small businesses to participate.

Our 2021, 2022, and 2023 Solarize Campaigns have resulted in 250 closed solar contracts around the Puget Sound area.

We've seen strong support from local municipalities and community groups that have helped spread the word about Solarize to tens of thousands of homeowners. Olympia Community Solar provides solar 101 educational content to participants and works to ensure customers do not fall through the cracks. After each campaign we've collected feedback from our participants and installer partners that we've used to improve the program.

This year we're expanding the campaign to include the City of Kenmore and Island, Whatcom, and Walla Walla Counties. The expansion is enabled by local community partners in each area.

We hope you'll support the campaign by submitting a proposal.

Mason Rolph, President

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Olympia
Community Solar

Founded in 2018, Olympia Community Solar (olysol.org) is a 501c3 nonprofit organization with the mission to steward an equitable and accessible clean energy transition. We provide solar project development and funding services, advocate for equity-focused solar policy, and organize community efforts to adopt solar.

2024 SOLARIZE CAMPAIGN GEOGRAPHIC SCOPE AND PARTNERS

CAMPAIGN LEAD



Olympia Community Solar - Thurston, Mason, Lewis Counties

Olympia Community Solar is a nonprofit organization with the mission to steward an equitable and accessible clean energy transition. Our team leads the campaign and is responsible for contractor procurement, material and content creation, enrollment management, customer support, public presentations, and campaign review.

Our team has recognized that local community partners are essential for connecting with new communities. We've secured partnerships that will provide local connections and a trusted local brand name to each of the campaign service areas.



Skagit Valley Clean Energy Cooperative - Skagit County

We are a member owned, not-for-profit clean energy cooperative in La Conner, WA. Our core purpose is to encourage clean energy using locally available resources and to become a valued source of information promoting greener and more sustainable communities in the Skagit Valley. We'll be sponsoring Solarize Skagit.



City of Kenmore

The City of Kenmore is located in north Seattle, and is the home of approximately 24,000 residents. Engaging in Solarize is part of a wider city initiative to promote sustainability and reduce emissions. We'll be sponsoring Solarize Kenmore.



Kicking Gas - Island County

Kicking Gas is a local campaign led by the nonprofit organization For The People with the mission to promote decarbonization efforts on Whidbey Island and strengthen our community in the face of energy and climate challenges. We'll be sponsoring Solarize Island County.



Sustainable Connections - Whatcom County

Sustainable Connections advances a regenerative local economy that builds community, strengthens food systems, catalyzes climate solutions, and expands access to housing in NW Washington. We'll be sponsoring Solarize Whatcom.



Sustainable Living Center - Walla Walla County

The SLC has established a reputation in the Walla Walla region as the clearinghouse for information and resources for making more sustainable lifestyle decisions. With funding from government and private sources, we maintain five successful programs that help us achieve our mission of conserving resources for the future, through encouraging and facilitating sustainable living practices in our community! We'll be sponsoring Solarize Walla Walla.

2024 SOLARIZE CAMPAIGN TIMELINE

Registration dates are subject to change and should be used for planning purposes only.

RFP Announced	11/21/2023
Voluntary Q&A Webinar Webinar link:	12/7/2023 at 10am meet.google.com/afd-vrwu-wht
Proposals Due	1/19/2024 by 5:00pm
Reference Checks & Interviews	Week of 1/22/2024
Firms Selected	2/2/2024
Participant Registration Open	To be determined - Goal of 3/1/2024
Participant Registration Closed	6/4/2024
Participant List Available to Contractor	On a rolling basis in accordance with participant registrations.
Installations Completed Goal	12/31/2024 or as arranged

PROPOSAL DUE DATE & SUBMITTAL

Please submit a proposal no later than 1/19/2024 5:00pm PST in PDF format to mason@olysol.org and CC info@olysol.org.

BASIC REQUIREMENTS FOR PROPOSING FIRMS

- **Must provide a group-based pricing structure that reduces cost.**
- **Must provide service to at least one campaign area.**
- Must accurately represent solar regulations, incentives, and benefits.
- Must be registered, or indicate that they will register, with the appropriate Business License divisions in at least one of the campaign counties and maintain good standing.
- Must be a general contractor and must hold an active Contractor Registration with the Washington State Department of Labor and Industries.
- Must maintain Workers' Compensation and Employer's Liability insurance.

PROPOSAL CONTENTS

I. Cover letter

The cover letter shall discuss the highlights, key features, and distinguishing points of the Proposal. The cover letter must be signed by a manager having the authority to make offers and enter into financial agreements on behalf of the firm(s).

II. Proposing firm profile

A. Detail the proposing firm's size and local organizational structure. Describe the demonstrated experience of the firm in developing, designing, and installing residential solar electric systems, and

how that would apply on a group scale. **Indicate how many leads per week and the total installations or the total kW capacity your team can commit to serving. Indicate your preferred service areas.**

B. Include a statement of the firm's financial stability, number of employees, length of time in business, capacity, and resources.

C. Provide a statement describing the firm's capability to complete the program per the timeline specified above. Explain how the firm can meet the demand that may occur due to this project (the 2022 campaign experienced over 100 signups in the first week). Present the firm's plan to accommodate demand within the timeline stated above.

III. Qualifications of the project team

A. Identify key personnel for this project including roles, experience, licenses, and certificates with corresponding identification numbers as appropriate. Key personnel should include at a minimum: Owners/Principals; Project Managers; Designers; Installers; and the Office Manager who will provide data to Olympia Community Solar per the specifications outlined in the Scope of Work.

B. Identify if your firm is women or minority owned, or has other unique ownership structures. Indicate if team members have engaged in Justice, Equity, Diversity and Inclusion trainings.

C. Identify any subcontractors the firm plans to use, along with their value to the project, and provide background information on their size, experience, management, licensing, and subcontracting agreement.

IV. Business practices

A. Describe the process for in-office management of leads, from receipt of lead information from Olympia Community Solar through customer contact, scheduling of site assessments and installations, and processing of relevant paperwork. Indicate what software and systems the firm uses to facilitate sales and reporting.

B. Describe your expected time frames between receiving a lead and site visit, site visit and quote delivery, and contract signing and system installation. Describe your expected timeline for project commissioning.

C. Provide a representative copy of the customer proposal and contract that the firm plans to use during the campaign that includes a the scope of work, equipment to be installed, terms and timeline of payments, terms for termination, performance verification, and construction timeline.

D. Liability: Provide information on the level of insurance the firm has, such as General Liability and Auto coverage for residential work. **Provide copies of certificates.**

E. Wages and Labor Practices: Provide information about labor practices, including your commitment to providing family wages, benefits, apprenticeships, and mentoring programs. Identify the percentage of workers who receive healthcare and other benefits.

V. Community practices

- A.** Discuss the firm's previous experience with public awareness and education in the target area of the campaign. Identify the individual(s) who will represent the firm at Solarize workshops.
- B.** Describe any sustainability practices adopted by the firm, partners or contractors. Include energy conservation, energy efficiency services, and waste management practices that the firm or its business partners provide to customers.

VI. Work quality and equipment

- A.** Explain why the products included in the proposal are appropriate for this project. **Include the manufacturing spec sheets and warranty information for each piece of major equipment.** Please describe system monitoring capabilities or production gauges. Please consider including a "Made In Washington" module option in your pricing (optional), and indicate if your equipment qualifies for the Domestic Content tax credit adder.
- B.** Describe the installation process, including how the firm will minimize disruption and disturbance.

VII. Customer service

- A.** Describe how the firm plans to handle incident reports (trouble, warranty, service calls, and inquiries). Discuss the firm's typical response time on calls, hours of coverage for customer service calls, and process for providing status reports after an incident is logged.
- B.** Discuss the most common problems and reported issues that the firm has experienced and how they have been resolved. List any complaints received by the Better Business Bureau or the Washington Attorney General's office, or other relevant agency over the last 3 years.
- C.** Describe the training the firm provides the homeowner, including materials or manuals, customer care books, and/or support for later questions and system performance.

VIII. Pricing and financing schedule

- A.** Using the attached pricing spreadsheet, please present a price-per-watt, exclusive of any incentives, tax credits, or company promotions for a grid-tied system installed on a typical detached dwelling. The price shall include all work described in Exhibit A, Scope of Work.
- B.** Using the attached pricing spreadsheet, 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. Describe any changes to the proposed pricing that would be applicable to commercial customers.
- C.** Consider indicating common additional services your firm provides such as EV chargers or energy efficiency.

Note: Customer contact, site assessments, system design and cost estimates are to be provided free of charge. Contracts shall include monitoring and minimum 20 year inverter warranties.

IX. Appendix

The Appendix may include any supporting information, such as resumes, references, or other data that will support the firm as the best for this campaign and best for the community you propose servicing.

ANTICIPATED OUTCOME

Olympia Community Solar intends to engage at least one contractor for each of the campaign service areas. We may engage multiple contractors per service area or engage a contractor to serve multiple service areas.

PROPOSAL EVALUATION

Olympia Community Solar may invite the contractor for interview and evaluation by a selection committee. Proposal and interview will be the central valuation in determining the final award. Evaluation Criteria include, but are not limited to:

Cost proposition (base price and additional cost factors)
Equipment and warranty quality
Contractor's proximity to the their proposed service area
Contractor's history of quality work and reliability
Contractor is a minority or woman owned business
Contractor has engaged in Justice, Equity, Diversity, and Inclusion (or the equivalent of) Trainings

CONDITIONS AND RESERVATIONS

Olympia Community Solar is not obligated to enter into an agreement with any Proposer and has no financial obligation to any Proposer arising from this RFP. The contract between the homeowner and the selected firm will not include Olympia Community Solar as a party, and 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 a Memorandum of Understanding (MOU) with Olympia Community Solar to confirm each party's roles and responsibilities prior to work starting.

Furthermore, Olympia Community Solar 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;
- Waive any minor informality or non-conformance with the provisions or procedures of the RFP, or to seek clarification of any Proposal;
- Negotiate and/or amend the Scope of Work to serve the best interest of the project.

EXHIBIT A - SCOPE OF WORK

The purpose of this Campaign is to enable the selected firms to access cost efficiencies through a program that combines lowered customer acquisition costs with group purchasing.

Olympia Community Solar will perform outreach to motivate participants to seek solar site assessments. The Campaign will reach more than 30,000 households using municipal utility mailing inserts alone. Our team will present information, answer questions, and provide an interface to the community at workshops.

As prospective participants are identified, their information will be distributed to the selected firms on a rolling basis. The selected firms will provide site assessments and proposals for each interested participant. Individual system designs should be aesthetically pleasing, taking into consideration the preferences of the owner while minimizing project costs and maximizing solar energy production. Proposals should take into consideration each owner's financial and site limitations.

For each participating home or small business, the selected firms will be responsible for securing all required permits and scheduling and passing all jurisdictional and utility inspections. The firms will provide introductions and support materials to the campaigns selected Financing Partners.

Solar Installation Partners Scope of Work:

- Fulfill solar installations in accordance with the proposal presented;
- Manage all participant site evaluations, work contracts, and solar system installations;
- Provide the participant with a proposal within seven business days of receiving the participant's information. Coordinate and complete participant initial site evaluations within fourteen days of work contracting. Proposals must be valid for 30 days, until at least July 4th, 2024.
- Execute customer contracts between the participant and the installation partner, with written specification within the customer contract that Olympia Community Solar is not party to the contract and that the installation partner is solely liable for any claims, losses, or damages arising out of the contract;
- Provide customer service before and after customer installations;
- Take a photo of completed installations and compile them into a shared folder;
- Maintain an up-to-date customer management system and provide Olympia Community Solar with bi-weekly reports that include;
 - Customer status
 - Date of scheduled or completed site assessment
 - Date of contract signing
 - Date of scheduled installation
 - Date of final payment
 - Kilowatt capacity, price of system, and any applicable cost adders
- Participate in project team meetings as scheduled;
- Provide Olympia Community Solar with a \$0.06/watt commission payment. Commission payments are due within 30 days of when the project's final invoice is paid. Late payments may be subject to a \$10.00 per business day late fee.
- Occasionally attend and present at community workshops;
- Support project partners to publicize the campaign, and provide press interviews as needed under coordination by Olympia Community Solar;
- Secure Olympia Community Solar's approval to publish any external statements or publications relating to the project prior to publication;
- Participate in campaign evaluation.

Exhibit B: Sample Contractor Terms and Conditions

Privacy Policy: Names, addresses, and additional information of those who participate in workshops, register on the website, or install solar systems through the project will not be made public or otherwise sold or exchanged unless the homeowner or business gives express written or opt-in permission.

Olympia Community Solar reserves the right to inspect solar contracts and warranty information from projects to ensure compliance with campaign terms.

Campaign Guidelines

- Installation partners may not add company promotion to the campaign price. Partners may offer company promotions (such as cash back for referrals) if they are included in the campaign's base offering.
- Customers resulting from a Project Participant's referral must receive Project pricing and inclusion until the contracting deadline passes.
- Installation partners must accurately represent incentives and tax credits. Misrepresentation of credit eligibility will result in termination of this agreement.
- Installation partners will not contract installations on roofs in poor condition (less than 10 years of usable or warranted life remaining) nor on sites with poor solar resource (less than 75% TSRF) unless the Campaign Sponsor provides written approval.
- Installation partners may only offer the equipment outlined in Exhibit A or approved in writing by the Campaign Sponsor. Installation partners are responsible for ensuring and providing proof that extended warranties are secured.
- Campaign Sponsor will distribute participant leads in a non-biased fashion based on the participant's location and installer partner's capacity. The Campaign Sponsor may change distribution practices based on contracting rates and kilowatts contracted.

Campaign Service Area Map

