

## **REQUEST FOR PROPOSALS FOR THE INSTALLATION OF RESIDENTIAL SOLAR ENERGY SYSTEMS**

The Northeast Coalition of Neighborhoods (NECN) is seeking qualified firms to submit proposals for the design, procurement and installations of new, residential, direct-owned photovoltaic (“PV”) systems for a cohort of Portland homeowners, based upon the scope of work contained in this Request for Proposal. The intent is to select one or more firms to provide services.

### **BACKGROUND**

NECN is an independent non-profit organization which contracts with the Office of Neighborhood Involvement to facilitate citizen participation services and related activities for the 12 neighborhood associations and citizens within our geographically defined area. NECN is collaborating with 12 Portland neighborhoods to create Solarize Northeast, a community solar installation program for Northeast Portland homeowners. Solarize Northeast will solicit participation from homeowners and coordinate the outreach and education component of the project. NECN intends that Solarize Northeast will help homeowners save money, improve home comfort, generate clean electricity, reduce carbon emissions, create jobs, and promote equity by creating economic opportunities and career pathways for historically disadvantaged or underrepresented people, including people of color and women.

Contractors can provide support and training services for low-income individuals embarking on a career pathway to economic self-sufficiency in the building and construction trades. Contractors that employ social enterprise models and/or partner with nonprofit community-based organizations are encouraged. This RFP encourages innovative, collaborative approaches to reaching out to residents, particularly those of low-to-moderate income in Northeast neighborhoods.

NECN will retain one or more firms to provide the design, equipment procurement, and installation services for homeowners that choose to participate. The selected firm(s) will provide a single pricing structure for all participants, depending on total project capacity. Interested homeowners will pledge by April 15, 2010 to install a system. Pending successful site evaluations by the selected contractor, total project capacity should be projected by April 15. Solarize Northeast hopes to have all installations complete by the end of August 2010.

## PROJECT TIMELINE

Dates are approximate and subject to change.

RFP announced	December 15, 2009
Proposals due	January 11, 2010
Interviews*	January 19, 2010
Firm selected	January 20, 2010
Participating homeowner list available	January 20 to April 15, 2010
Installations completed**	August 31, 2010

\*The need for interviews will be determined by the NECN evaluation team.

\*\*Estimated completion date

## PROPOSAL INSTRUCTIONS

Bidders shall contact Solarize Northeast Program Manager, Kelly Rodgers, via email with their intent to apply at [solarize@necoalition.org](mailto:solarize@necoalition.org). Bidders may contact the Program Manager with any questions or requests for additional information needed to submit a proposal. **The deadline for submitting such questions/clarifications is 7 days prior to the proposal due date.** An addendum will be issued no later than 72 hours prior to the proposal due date to all recorded holders of the RFP if a substantive clarification is in order.

### Proposal Due Date

NECN must receive proposals no later than January 11, 2010 at 5:00 p.m. local time. Proposals may be submitted by mail or electronically. Mailed submissions must include three copies of the proposal and shall be delivered attention to Kelly Rodgers, NECN, 4815 NE 7<sup>th</sup> Ave. Portland, OR 97211. Electronic submissions must be sent to the attention of Kelly Rodgers at [solarize@necoalition.org](mailto:solarize@necoalition.org). All emailed proposals should be followed up with a phone call to verify receipt at 503-823-9134.

Faxed proposals and late proposals will not be accepted. Proposals may be withdrawn at any time before the due date and time noted above via an emailed request.

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 contact Kelly Rodgers at [solarize@necoalition.org](mailto:solarize@necoalition.org). Communications with members of the evaluation committee or NECN staff for the purpose of unfairly influencing the outcome of this RFP may be cause for the Proposer's proposal to be rejected and disqualified from further consideration.

NECN is not liable for any costs incurred by a firm in the preparation and/or submission of a proposal. Any material submitted by a proposer will become the property of NECN.

NECN may modify the RFP at any time prior to the RFP due date, by issuance of a written addendum to all proposers who are participating in the process. NECN may also cancel, delay, or suspend this solicitation if in the best interest of the neighborhoods represented as determined by NECN. NECN may reject any or all proposals, in whole or in part, if in the best interest of the neighborhoods represented as determined by NECN.

During the evaluation process, NECN has the right to require any clarification it needs in order to understand the bidder's approach. NECN may choose to interview the highest ranked proposers. NECN anticipates firm selection by January 20, 2010.

## **PROPOSAL FORMAT AND EVALUATION CRITERIA**

Please create project proposals in 8 ½" x 11" document size using a minimum 11 point font size. Proposals shall not exceed 20 pages, including any appendices.

### **I. Cover Letter (0 points)**

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

### **II. Proposing firm profile (20 points)**

This section shall include a brief description of the Proposer's firm size and Proposer's local organizational structure. Include a discussion of the firm's financial stability, capacity and resources.

Describe the demonstrated experience of the firm in developing, designing and installing residential solar electric systems, particularly on a community-wide scale, along with a discussion of how experience on previous projects relates to the Solarize Northeast project. As part of this discussion, list any recent similar residential installations by size and location, with a contact name and telephone number where appropriate.

Firms must be general contractors registered with the Oregon Construction Contractors Board, and in good standing, in order to be considered for this project. Firms must also be approved Energy Trust of Oregon Solar Electric trade allies and employ one or more Oregon Department of Energy Tax Credit-Certified Technicians.

Provide a statement describing the firm's capability to complete the project within the desired time schedule.

### **III. Qualifications of the project team (10 points)**

Identify the key project team members by name and position, and provide qualifications and experience. Provide names, addresses, contact information, and contractor license

numbers for all specified subcontractors the firm intends to employ for the project.

**IV. Use of local and sustainability oriented providers (10 points)**

**A. Sustainability practices**

Provide documentation listing the city and state of participants, including manufacturers, installers, and any other partners in the project. Describe the major sustainable attributes of Proposer's business practices, as well as that of other partners.

**B. Local and neighborhood-based providers**

Provide documentation of Oregon and Portland-based employees, consultants, or subcontractors. Provide information about your firm or your subcontractor's involvement with the northeast Portland neighborhood and community, including professional or volunteer organization memberships and past work in the area.

**V. Diversity in employment and contracting (10 points)**

NECN wishes to support businesses owned by historically disadvantaged or underrepresented people, including people of color and women.

**A. Identify if the business owner is a historically disadvantaged or underrepresented person.**

**B. Identify your current diversity of workforce and describe your firm's commitments to providing equal employment opportunities. Include in your response:**

- Number of total employees and description of type of work performed.
- Number of minorities and women within your current workforce, broken out by ethnicity and positions held.
- Any underutilization of minorities or women within your workforce and your firm's efforts to remedy such underutilization.
- Any plans to provide innovative mentoring, technical training or professional development opportunities to minorities and women in your workforce in relation to this project, or plans to employ minorities and women to work on this project.
- Description of the process your firm uses to recruit minorities and women.

**C. Please describe your history of subcontracting to or partnering with business owned by historically disadvantaged or underrepresented people, including people of color and women. Include in your response:**

- List of businesses owned by historically disadvantaged or underrepresented people with which your firm has had a contractual relationship.

- Any innovative or successful measures that your firm has undertaken to work with businesses owned by historically disadvantaged or underrepresented people on previous projects.
- Any mentoring, technical or other business development services your firm has provided to previous or current businesses owned by historically disadvantaged or underrepresented people or will provide in relation to this project.

**VI. Employment practices (10 points)**

Provide information about employment practices, including wages, benefits, apprenticeships and mentoring programs.

**A. Wages**

NECN favors contractors who pay a “family wage.” Describe how your firm provides compensation and advancement opportunities for employees.

**B. Employee Benefits**

Describe employee benefits, including health benefits, family leave provisions, equality for spouses and domestic partners, retirement plans, and labor relations practices.

**C. Apprenticeship and mentoring programs**

NECN encourages contractors who recognize the value of quality training for employees by participating in registered apprenticeship and other credential-granting programs. Provide information about your firm’s participation in training and certification programs, as well as any innovative training models that you have deployed, or intend to implement for this program.

**VII. Scope of services and schedule (20 points)**

Provide a detailed scope of service addressing the requirements listed in the scope of work, attached as Exhibit A. Address all necessary work tasks in narrative form and prepare a project schedule showing the timeline for completion of the work. Begin schedule with the receipt of the list of participating homeowners.

Describe how the proposing firm will establish and maintain quality control through the project work, as well as process for permitting and inspections. Provide details outlining the number of residential systems per week that your firm or subcontractors are capable of installing, and what factors are accounted for in these estimates.

Provide information about the minimum and maximum system size (in kW) to be installed for customers as part of the program, and the manufacturer and/or models of PV modules, inverters, and racking equipment. Include details about manufacturer’s

equipment warranties, applicable labor and roof penetration warranties, as well as the system monitoring capability provided by the firm or by equipment manufacturers.

Describe any educational opportunities available, such as a community kiosk with real time power production information for public education, or access to online real time data available that could be added to NECN or the Solarize Northeast project's website.

### **VIII. Pricing schedule (20 points)**

Provide a proposed pricing schedule based on the total capacity (in kilowatts<sub>DC</sub>) of participation in the project. Pricing schedules should conform to the format outlined in Exhibit B. It is anticipated that as the capacity of participation increases, the price per-watt will decrease, however flat rate pricing will be considered as well. Pricing based solely on individual system size will not be considered. If your firm proposes different prices based on various equipment manufacturers, provide details. Itemize structural, access, roof, electrical, or other conditions that would increase system costs for participants, and estimate additional costs per installation on either a per watt or per system basis.

Pricing must include all materials, equipment, labor, transportation, permits, warranties and services required to assess the proposed homes and design and install the systems in accordance with all applicable laws and codes, interconnection requirements, Energy Trust of Oregon, and Oregon Department of Energy Installation Requirements. Additional services and features not stipulated by these requirements, such as extended warranties, maintenance contracts or ancillary monitoring equipment, may be listed and priced separately.

Pricing should be presented as price per-watt of installed capacity, before any eligible Energy Trust incentives or state and federal tax credits. Final pricing for the program will be determined once contractor selection is made. In the event that more than one contractor is selected to provide services, a single price will need to be negotiated between the selected firms to provide uniformity in program marketing. Additionally, development of the Oregon State Volumetric Incentive Rate pilot program (Feed-in-Tariff –FIT) may create interest in this alternative incentive structure. The installed price shall be independent of whether the customer chooses a net-metered or FIT incentive structure.

The proposal should include any financing options that the firm can make available to homeowner participants.

## **IX. Appendix: Supporting Information**

The Appendix may include any supporting information, such as resumes, references or other data that will support your firm as the best proposer for the project.

### **PROPOSAL EVALUATION**

NECN may invite the top ranked proposers to make a brief oral presentation and/or be interviewed by the evaluation team. Criteria for oral interviews will be provided upon invitation.

After evaluation of proposals and any interviews, NECN will select a firm(s) to provide the services described herein.

Please feel free to contact me directly with any questions concerning this request for proposals at [solarize@necoalition.org](mailto:solarize@necoalition.org).

Sincerely,

Kelly Rodgers  
Solarize Northeast Project Manager

## **EXHIBIT A SCOPE OF WORK**

### **INTRODUCTION**

The selected firm will provide consulting and other services for the design and installation of residential solar electric systems for a cohort of Portland homeowners, in accordance with the general scope of services outlined below. Proposers may use this outline as a guide for organizing a scope of work for their proposal, but are encouraged to expand upon, refine or suggest alternative approaches based on previous experiences with similar projects.

### **GENERAL SCOPE OF WORK**

The purpose of this project is to install photovoltaic systems on homes in northeast Portland at a per-watt price lower than the typical residential installation. Homeowner participants in the project will be solicited by NECN through a community project called Solarize Northeast.

The number of participating homes and total capacity of the project is unknown. Twelve northeast Portland neighborhoods are actively participating in the project, representing approximately 10,500 owner-occupied single-family homes.

In February and March, Energy Trust of Oregon, the City of Portland and other project partners will deliver educational workshops. The selected firm(s) are expected to have staff available to answer questions and provide an interface to the community at these workshops. Other neighborhood outreach opportunities may be created that selected firm(s) can participate in if they wish.

In late March, a list of homeowners who wish to proceed with an installation will be provided to the selected firm(s). If more than one firm is selected, NECN will refer homeowners to the firms in an equitable manner. The selected firm(s) will provide site assessments and system design proposals for each homeowner on the list, to establish each site's suitability for solar, identify the selected system size and finalize the installation cost for each home. Site assessments will include an analysis of the impact of shading, tilt and orientation on annual electricity production, and note any electrical, mechanical or structural considerations that may incur costs above and beyond the per-watt pricing schedule for the project.

Individual system designs should be aesthetically pleasing, taking into consideration the preferences of a given homeowner, while minimizing project costs and maximizing solar energy production.

The installations will be carried out by the selected firm(s) in conformance with all applicable laws and codes, interconnection requirements for net-metered installations, Energy Trust and Oregon Department of Energy Installation Requirements, and existing rules and timelines.

For each participating home, the selected firm(s) will be responsible for securing all required permits, completing and submitting Energy Trust of Oregon incentive applications, and scheduling and passing all jurisdictional and Energy Trust inspections. The selected firm(s) will provide guidance and assistance to each homeowner with completing a net-metering agreement with their utility. The firm(s) will provide each homeowner with the information, documentation and Tax Credit-Certified Technician signature required to complete the Oregon Department of Energy Residential Energy Tax Credit application. The firm(s) will also provide each homeowner appropriate documentation and guidance for applying for the federal energy tax credit.

### **SERVICES TO BE PROVIDED BY THE NORTHEAST COALITION OF NEIGHBORHOODS (NECN)**

NECN will provide a Project Manager who will be responsible for overall project management. They will provide coordination between the selected firm and participating homeowners, including timely response to any inquiries. The Project Manager will be reasonably available for any meetings.

Energy Trust of Oregon, the City of Portland and other project partners will deliver educational workshops ranging from solar project basics to topical sessions on net-metering, technical nuts & bolts, incentives & tax credits, financing options, and energy use analysis. Energy Trust of Oregon will also offer free Solar Energy Reviews—one-hour, informational walk-throughs—that answer basic homeowner questions about solar and help them understand: their energy consumption, site suitability for solar, eligibility for incentives and tax credits, how solar will impact their bill, and other energy improvements to consider.

With support from NECN, each actively involved neighborhood has committed to publicizing the project at local events, via newsletters, bulletins flyers, and other community communication outlets.

### Exhibit B - Solarize Northeast Pricing Structure Template

Proposer Firm Name	
Contact Name	
Contact email	
Date	

<b>PV System Equipment Information</b>	
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Modules	Inverter

Modules	Inverter

Total Participant Capacity (kW)	less than 50 kW	50kW to 75 kW	75kW to 100kW	100kW to 150kW	150kW to 200kW	more than 200kW
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Price (\$ / watt)						
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Price (\$ / watt)						
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#### Additional Cost Factors (if any)

Roofing	
Structural	
Electrical	
Access	
Monitoring	
Extended Warranty	
Maintenance Contract	

#### Estimated Cost Increase/ Criteria
