

Appendix A: Requests for Proposals

The City of Santa Monica issues an RFP for professional services in April 2002. Milford might consider issuing a similar RFP. The City of Santa Monica's RFP can be found on the Local Government Commission's website: http://www.lgc.org/services/docs/spire/rfp_santa_monica.pdf.

Additionally, the Prometheus Institute has created a template for local governments and other organizations to follow when issuing an RFP for a traditional solar power purchase agreement with a renewable energy developer. Although Milford may not be immediately interested in issuing an RFP for a traditional SPPA, the document is still informative in that it provides a comprehensive overview of important considerations for any RFP for solar services.

For the purposes of developing the "Borough Farm" site, ignore the language regarding rooftop specifications. Also, the language regarding pricing of electricity output from the solar facility may not apply to Milford's RFP depending upon the borough's interest and ability to negotiate an agreement between a solar developer, a third party energy supplier, and the borough.



Prometheus Institute

Sample RFP
for
Photovoltaic Power Production

for organizations seeking
solar energy

Our History:

Founded in 2003 by Travis Bradford, a former private equity and hedge fund executive, the Institute was created to fill a need for reliable data, quantitative analysis and practical information about the renewable energy industry. This lack of information is a limitation to the growth of the field and inhibits economic support for sustainability, and the Institute was created to provide this vital information and thereby accelerate the transition to widespread use of these sustainable technologies. Since its founding, the Institute has focused almost exclusively on pursuing these objectives specifically with respect to solar energy and photovoltaic (PV) electricity.

About this Template:

This RFP template was designed for organizations that are seeking competitive bids for solar energy production. This template aims to incorporate the best practices from actual RFPs that have been issued in the past. This template intentionally excludes some requirements and redundancies that present unnecessary obstacles for organizations seeking solar energy, as well as solar energy developers.

We hope you will use this template as a baseline to develop your RFP for solar energy and we urge you to customize it for your purposes.

Please note that this is a Word template document (not just a regular Word document) so you may notice some differences upon opening and saving this document.

Directions:

1. Please replace all information in *italic-highlight* as appropriate.
2. After all information in italic-highlight has been updated, right click on the Table of Contents, select “Update Field,” and then select “Update Entire Table.”
3. To delete comment boxes, right click the comment, and click “delete.”
4. When finished, delete this page and the cover page.

Insert Organization's Logo here

Request for Proposals
for
Photovoltaic Power Production

Insert Solicitation #, if applicable

Issued by

Organization Name

RFP Issue Date

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Introduction

Information about Organization

Organization is a government agency/ industry type serving describe customer base in describe locations, service territory, etc.

Renewable energy goals and/or reasons for issuing RFP

Organization is issuing this Request for Proposals (“RFP”) to obtain electricity derived from photovoltaic (PV) energy sources. Organization wishes to purchase solar-generated electricity under a long-term Power Purchase Agreement. Under this RFP, Organization is seeking Total # of MW desired under this RFP megawatts of photovoltaic capacity.

Organization wishes to obtain clean energy for the following reasons: state environmental, social, or financial goals of the organization and/or motivation to use energy generated from renewable sources.

State relative importance of: timing of project completion, price of energy, and/or total megawatts hours produced. The successful Proposer will provide energy that meets the definitions of renewable energy goals as stated in (relevant legislation or organizational objectives).

Organization wishes to obtain this clean energy by date/year. Describe timing goals for PV installation and rationale for any constraints. If Organization does not meet these timing goals state any (legal, financial, or organizational) repercussions for not meeting objectives.

Timeline for RFP process:

- RFP issue date.....Issue date
- Pre-proposal meeting.....Issue date + 2 weeks
- Site visit date.....Pre-proposal meeting date
- RFP due date.....RFP Issue Date + 8 weeks
- Notice of intent to award.....Due date + 3 weeks
- Contract negotiations completed.....Intent to award + 6 weeks
- System operational.....Commercial operation date

Contact information

Organization has designated an individual to manage the RFP process, address all questions from potential bidders, and provide updates as necessary during the bidding process. Any RFP-related updates shall be emailed to the list of participants as documented at the pre-proposal meeting.

Please address all RFP-related questions and communications to:

- *Contact name*
- *Contact email*
- *Contact phone*
- *Contact address*

Description of PV Sites

Comment [A1]: We advise the Organization issuing the RFP to work with the successful Proposer to select PV sites.

However, if the Organization is designating PV sites, then the Organization should provide the following site info.

If there is more than 1 site, a distinct site name & site-specific information should be provided for each site under consideration.

Site information

The following information is relevant to the proposed PV system location(s):

- **Number of Sites:** Include # of sites here
- **Location & Area:** Include site address or attach Google Earth placemark to delineate the available space for PV system.
- **Ownership:** Detail owner of property (is it self-owned or is there a landlord)
- **Utility:** Provide name of local utility company
- **Energy usage:** Provide: 12 months of energy usage data, 15-minute interval data, and/or electric bills
- **Local authority:** Local permitting authority
- **Configuration:** Include information on size & configuration of available space

Ground-mount Information:

- **Geological info:** Geotechnical characteristics or reports
- **Structural info:** Describe structural characteristics of land
- **Interconnection:** Detail distance to point of interconnection
- **Voltage:** Detail interconnection voltage
- **Environmental factors:** Describe any environmental permitting considerations
- **Soil type:** Describe soil type
- **Slope:** Describe slope of land and/or grading requirements
- **Water:** Describe any storm water or potential water issues
- **Zoning:** Describe zoning restrictions or requirements
- **Underground hazards:** Detail location of underground utilities
- **Unique characteristics:** Describe any unique land characteristics

Comment [A2]: Only include this section if the designated site is a ground site.

Roof information:

- **Roof design:** Include roof design drawings
- **Roof type:** Include roof type & manufacturer
- **Roof condition:** Describe age & condition of roof (remaining life and/or roof warranty)
- **Plans to reroof:** Describe any plans to reroof
- **Roof height:** Detail roof height
- **Roof orientation:** Detail roof orientation (azimuth)
- **Roof load:** Delineate roof's ability to accept additional load (in lbs per square foot)
- **As built drawings:** Provide building & electrical designs (as-built drawings)
- **Shading:** Detail any shading obstacles and ability to obtain shading easements
- **Access:** Describe any site access restrictions

Comment [A3]: Only include this section if the designated site is a roof site.

- *Requirements:* Describe any special construction or contractor requirements

Scope of Work:

The goal of this RFP is to identify the Proposer who will enable the most cost effective solar energy production over the entire PPA term. The successful proposer will have the capability to develop, offer, and manage # of MW to be installed under RFP megawatts of PV capacity.

Capital funds for the PV project(s) are not available. Organization will only purchase the solar-generated electricity.

The proposed PV system(s) shall be installed at (choose one of the following) (1) sites jointly identified by Proposer and Organization, (2) specified facilities/sites that are identified by the Proposer, or (3) project locations that are identified by Organization.

Following project award, the Organization intends to enter into a solar PPA with the successful Proposer for a term of twenty years for each PV project. Upon completion of the PV project(s), the successful Proposer may be asked to assist Organization in identifying and implementing a comprehensive long-term solar program. If the initial project proves successful, Organization anticipates acquiring access to approximately Number of MW additional megawatts of PV capacity over the subsequent # of years year period.

The successful Proposer shall provide fully managed photovoltaic services that include, but are not limited to, securing the necessary labor, services, equipment, permits and approvals to develop fully operational PV systems at agreed-upon sites. They will then commission, own, monitor, operate, and maintain the systems after installation.

All applicable federal and state laws, county, bi-county, local, and municipal ordinances, and the orders, rules and regulations of all authorities having jurisdiction over this work shall apply to the

Contract throughout the term of the agreement, and they will be deemed to be included in the contract the same as though written out in full.

Proposal Directions & Requirements:

Each Proposer must submit *# of copies required* hard copies of the proposal and *# of CDs required* copy of the proposal on a compact disc to:

Contact name

Contact address

The proposal copies shall be double-sided with 30% recycled paper content (or more).

In order for a proposal to be evaluated, the following three (3) requirements must be met:

1. **Proposals must be received by the due date and time established in the “Timeline for RFP Process.”**

Any proposals received after the specified date and time will be disqualified from further evaluation.

2. **The cover letter of the proposal includes the signature of a representative authorized to bind the Proposer.**
3. **The Proposer must provide all information requested, in the format dictated in the following section “Proposal Organization.”**

Failure to meet any of these requirements is grounds for rejecting a proposal.

Proposal Organization

Tab 1: Cover Letter

1. Cover letter should highlight any special features of the Proposal, and include the name, phone number, and email for the point of contact within the Proposer's organization. The cover letter should be signed by a representative of the Proposer's company who has the authority to bind the Proposer.

Tab 2: Experience & Qualifications

Section A: Project development experience

1. Describe which elements (finance, design, construction, service, etc) of a PV installation will be managed by a partner or third-party other than the Proposer; and describe the structures that will ensure that the Proposer will be held accountable for the successful completion of each element of the project's development.
2. Describe solar programs that have been developed for Proposer's current customers.
3. Describe canceled contracts and reasoning for why each signed contract was not completed.

Section B: System design experience

1. Describe Proposer's experience with the design of PV systems.
2. Provide a sample construction drawing set for one of Proposer's completed PV systems.

Section C: Project construction experience

1. Detail the number of megawatts the Proposer has constructed.
2. Detail the number of distinct projects the Proposer has constructed.
3. Detail the general types of projects installed.
4. Detail the types of customers the Proposer has worked with in the past.
5. Describe implementation of PV construction standards and other safety measures.
6. Provide three (3) customer references from customers who worked with Proposer during the installation phase.

Section D: Project financing experience

1. Provide number of PV systems that have been financed by the Proposer.
2. Provide number of systems that Proposer is operating under a PPA.
3. Provide demonstration of capital available to fund the proposed (and future) projects.

Section E: PV supplies & experience

1. Provide demonstration of Proposer's supply contracts or actual PV panel supply.
2. List Proposer's preferred PV panel technology and past experience with those technologies.
3. List panel suppliers that Proposer has worked with and describe the relationship with the supplier.
4. Detail if Proposer has utilized fixed panel systems, one-axis tracker systems, or dual-axis tracker PV systems.

Section F: Operations and maintenance experience

1. Provide the number of operational PV systems under management.
2. Provide system performance for three (3) systems to date (expected vs. actual energy production).
3. Describe the monitoring systems that the Proposer will use to verify system performance.
4. Detail the number of PV systems the Proposer has managed for more than one year, and describe any lessons learned from this experience.
5. Provide three (3) references from customers who are receiving operations and maintenance service.
6. Provide proposed maintenance plan.

Section G: Rebate processing experience

1. Describe Proposer's rebate processing services.
2. Detail the locations in which the Proposer is developing projects or has successfully obtained local incentives.

Section H: Qualifications to provide REC certification assistance

1. Describe the REC certification process that Proposer will undertake.

Section I: Energy production assurance

1. Describe any penalties the Proposer would incur if the eventual PV system did not produce energy as expected.
2. Describe any third party verification of predicted or actual energy production.
3. Include insurance coverage documentation.

Section J: Monitoring & verification capabilities

1. Describe the methodology and frequency of solar energy production reporting.
2. Describe the methodology and frequency of solar energy production reporting in relation to the facility's total energy load.
3. Describe the methodology and frequency with which environmental attributes data (i.e. RECs / carbon offsets) will be reported.

Section K: Team

1. Provide organizational chart that describes the reporting relationships of all key personnel.
2. Provide bios for key personnel.
3. Describe Proposer's team organization.
4. Provide location of Proposer's nearest regional office.

Section L: Additional services & capabilities

1. Describe any additional services that Proposer will provide as part of the proposal or is willing to provide at an additional cost.

Tab 3: Technical Information

Section A: PV system

1. Describe PV technologies that will be installed and any guarantees on the use of specific equipment types or their equivalents.
2. Provide project layout with MW DC size, configuration, azimuth, and tilt angle of proposed system.
3. Provide electrical one-line diagram for proposed system with total inverter size (in MW AC).
4. Provide a sample project schedule which includes milestones for design, permitting, material delivery, installation, and commercial operation.
5. Provide a monthly energy estimate. Cite the weather data source.

Tab 4: Pricing & Terms

Section A: Pricing information

1. Provide price per kilowatt hour in Year 1.
2. Provide annual rate increase, if applicable.
3. Provide length of PPA term.
4. Provide detail of any factors that may affect price.
5. Provide proposed terms and conditions or proposed PPA in its entirety.

Tab 5: Appendix (Supporting information)

Exhibit A: Sample construction set

Exhibit B: Insurance coverage documentation

Exhibit C: Organizational chart

Exhibit D: 1 page biographies for key personnel

Exhibit E: System layout

Exhibit F: Electrical 1-line diagram

Exhibit G: Project schedule

Exhibit H: Terms & conditions

Proposal Evaluation Criteria

Proposals will be numerically rated for comparison on the following criteria:

Evaluation Criteria

Points

Comment [A4]: If Organization wishes to change the evaluation criteria, or see the rationale behind each criteria, please see the Excel File "Commercial Evaluation Criteria_RFP Template". Then copy and paste the revised criteria in this section.

Tab 1: Cover Letter

1. Proposer has identified a single point of contact for all phases of the PV project (sales, design, construction, financing, service, rebate, REC certification). 2

Tab 2: Experience & Qualifications

Section A: Project development experience

1. Proposer has described a fully managed that does not require the subcontracting of work to partners or third parties. 2
2. Proposer can describe 2 solar programs that have been developed for other customers. 3
3. Proposer can describe 2 solar programs that have been developed for other customers. Proposer has demonstrated a strong project success rate and cited an outside source, such as California Solar Initiative, as evidence. 2

Section B: System design experience

1. Proposer has *designed* roof-mounted and ground-mounted PV systems. 2
2. Proposer has included a sample construction set of a completed PV system. 1

Section C: Project construction experience

1. Proposer has completed a minimum of:
 - (5) MW of commercial-scale roof-mounted systems (if roof-mounted site)
 - (15) MW of commercial or utility-scale ground-mounted systems (if ground-mounted site)2

- | | |
|---|---|
| 2. Proposer has completed: | |
| • (25) commercial-scale roof-mounted systems (if roof-mounted site) | |
| • (10) commercial or utility-scale ground-mounted systems (if ground-mounted site) | 2 |
| 3. Proposer has <i>installed</i> roof-mounted and ground-mounted PV systems. | 2 |
| 4. Proposer has experience working with customer types similar to Organization (commercial, municipal government, federal government, utility). | 2 |
| 5. Proposer has described leadership in development and implementation of PV construction standards and other safety measures. | 1 |
| 6. Proposer has provided 3 references from customers who worked with Proposer during the installation phase. | 1 |

Section D: Project financing experience

- | | |
|--|---|
| 1. Proposer has demonstrated experience in obtaining financing for (25) or more PV systems. | 3 |
| 2. Proposer is operating (25) or more PV systems under a PPA. | 2 |
| 3. Proposer has indicated that they have the required capital to fund the proposed projects. | 2 |

| | |
|----------------------------|---------------|
| Evaluation Criteria | Points |
|----------------------------|---------------|

Section E: PV supplies & experience

- | | |
|--|---|
| 1. Proposer has provided evidence of supply contracts or actual PV panel supply sufficient to supply the proposed project. | 2 |
| 2. Proposer has described access to all major panel types (monocrystalline, polycrystalline, amorphous silicon, cadmium telluride, and CIGS) and has used two or more of these technologies. | 3 |
| 3. Proposer has experience with more than 3 PV panel manufacturers, but is not partial to any. | 2 |
| 4. Proposer has experience with fixed and tracking PV systems. | 1 |

Section F: Operations and maintenance experience

- 1. Proposer has demonstrated that they have at least (25) individual PV systems under management (a variety of system sizes, with each system sized at >20 kW). 3
- 2. Proposer has provided data for actual system performance of (3) operational PV systems (expected vs. actual energy production). 2
- 3. The Proposer has described a proven monitoring system that will be used to document and communicate system performance to the PV service provider. 2
- 4. The Proposer has more than 1 year of experience managing systems and is able to provide annual data upon request. 2
- 5. Customer has provided 3 references from customers receiving O&M services. 1
- 6. Proposer has provided an annual maintenance plan with scheduled panel washing, inverter maintenance, and routine maintenance. 2

Section G: Rebate processing experience

- 1. Proposer has provided detailed descriptions regarding rebate/incentive processing necessary to obtain local incentives. 1
- 2. Proposer has demonstrated experience working in different states and has proven the capability to successfully obtain local incentives. 2

Section H: Qualifications to provide REC certification assistance

- 1. The Proposer has described the REC certification process they plan to undertake. 1

Section I: Energy production assurance

- 1. The Proposer has described the financial penalties it will incur if the PV system does not produce as expected. The Proposer prefers a PPA model and will only be paid 2

for energy produced. The Proposer will not pay for any capacity fees.

2. The Proposer has committed to utilizing a 3rd party to estimate energy production before commercial operation, and will utilize a 3rd party to verify actual energy production after the first full year of operation. 2
3. Proposer has provided evidence of adequate insurance coverage to build and maintain the PV system. 1

Evaluation Criteria **Points**

Section J: Monitoring & verification capabilities

1. The proposer will provide near real-time 15-minute interval data for solar energy produced by the PV system for the duration of the PPA term. 1
2. The proposer will provide solar energy production data as a percentage of the facility's total energy load for the duration of the PPA term. 2
3. The proposer will provide data on environmental benefits (i.e. carbon offsets) that are generated by the PV system for the duration of the PPA term. 1

Section K: Team

1. Proposer has provided an organizational chart. 1
2. Proposer has provided 1 page bios for key personnel. 1
3. Proposer has described a streamlined team structure with few, if any, subcontractors or partnerships. 2
4. Proposer has or will have an in-house regional office that is staffed with necessary trucks and equipment to build and service the PV system. This office is or will be within 50 miles of proposed site. 1

Section L: Additional services & capabilities

1. Proposer can provide additional services and capabilities which are of interest to +3

Organization. (Up to 3 bonus points)

Tab 3: Technical Information

Section A: Site Information

- | | |
|--|---|
| 1. Proposer has detailed expected PV technologies and has guaranteed the use of those technologies or their equivalent. (Equivalent technologies shall have +/- 10% of energy production and space requirements of the proposed technologies.) | 3 |
| 2. Proposer has provided a preliminary PV system layout. Layout includes size, configuration, azimuth, and tilt angle of proposed system. | 1 |
| 3. Proposer has provided a sample or preliminary electrical one line diagram. | 1 |
| 4. Proposer has included a sample or preliminary project schedule with milestones for design, permitting, material delivery, installation, and commercial operation. | 1 |
| 5. Proposer has provided a monthly energy production estimate and provided the weather data source. | 1 |

Tab 4: Pricing & Terms

Section A: Pricing Information

- | | |
|---|----|
| 1. Proposer has provided a competitive PPA rate and escalation rate. | 22 |
| 2. The Proposer's annual escalation rate follows a fixed schedule for the PPA term. | 1 |
| 3. The Proposer has provided an acceptable PPA term. | 1 |
| 4. Proposer provides a list of pricing exceptions, which are inclusive of all factors which may affect price. | 1 |
| 5. Proposer has provided proposed terms and conditions. | 1 |

| | |
|-------------------------------|------------------|
| Total Points available | <hr/> 100 |
|-------------------------------|------------------|