

Southern Tier Solar Works

Request for Qualifications

(RFQ) Fillable Form

For the Installation of Residential, Small Commercial, Large Commercial, and
Community Solar PV Systems in designated partner communities

Save this form as: yourfirmnameSTSW2017RFQ

Date of Issue:	January 25, 2017
Proposal Due Date:	February 13, 2017
Issued by:	Binghamton Regional Sustainability Coalition
RFQ Point of Contact:	Adam Flint, 607-873-9220, stswinfo@southerntiersolarworks.org

Copies of the RFQ document may be downloaded from <http://southerntiersolarworks.org>

Proposals submitted via stswinfo@southerntiersolarworks.org, not later than February 13, 2017

2017 Program Timeline

January 25 - RFQ released

January 30 - RFQ Questions due

February 3 - RFQ Answers Due

February 13 - RFQ deadline

February 15 - RFP released to qualified installers

February 21 - RFP questions due

February 27 - RFP answers due

March 3 - RFP deadline

March 13 - RFP Installer Partner candidate interviews

Week of April 10 - Installer partners announced

April 29 - Campaign Program Launch, Press Conference & initial solarize workshop 10 am – 11am, Location University Downtown Center. Followed by Solar Art Workshop 11-5.

November 1 - Enrollment Deadline

November 22 - Contract Deadline November

The above timelines will be strictly followed to ensure the success of the program and the actual deployment of the contracted solar PV systems in a timely fashion. Selected Installer Partners will be expected to plan accordingly and meet the above deadlines. Failure to do so may result in the Installer Partner's disqualification from the program.

Questions Relating to the RFQ

We invite installer questions in writing (via email) to stswinfo@southerntiersolarworks.org by January 30. Questions and answers will be POSTED TO THE STSW WEBSITE by February 3. Informal requests for clarifications can be submitted at any time by email or telephone, but if the question is relevant to more than the individual installer, STSW may POST/CIRCULATE BY EMAIL the question and answer for all installers. Questions or requests may lead to a formal amendment of the RFQ at any time until the deadline. Notice of such changes will be emailed to all the firms on our list.

Submittal of RFQ

This fillable RFQ response form must be submitted no later than **February 13**. Please submit proposals electronically, via email in PDF format, to stswinfo@southerntiersolarworks.org. All emailed proposals will receive an email confirming receipt. If you do not receive a confirmation email, please contact STSW at 607-873-9220.

Proposals must be signed with a digitally captured signature or via a scanned document with signature. Submission of a signed proposal will be interpreted to mean that the proposer has agreed to all terms and conditions set forth in this solicitation document. Faxed proposals and late proposals will not be accepted. Costs for developing the proposal, including travel, mileage, printing and per diem, including any costs incurred during the interview process, if applicable, are entirely the responsibility of the proposer.

Proposals may be withdrawn at any time before the due date via an emailed request. Proposers may also submit a written modification in accordance with the instructions for submitting a proposal as identified in this RFQ. Any modification is required to have an updated date and time placed on it by the proposer, must be submitted by the due date stated above, and must have the words ***"This modification amends and supersedes the prior offer"*** written on page 1 of the modification.

All communications shall be through the Project Manager listed on the RFQ Cover Sheet. Communications with any other members of STSW or BRSC STAFF or Board of Directors for the purpose of unfairly influencing the outcome of this RFQ may be cause for the proposal to be rejected and disqualified from further consideration. Submitted proposals become the property of STSW and BRSC.

Summary of Requirements for RFQ Response

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Proposing firms must respond to each section of the Request for Qualifications to outline their ability to meet and surpass minimum requirements of the program. These requirements and the grading rubric can be found in the full RFQ document.

I. Cover letter

Section I shall be a signed cover letter summarizing the highlights, key features, and distinguishing points of the proposal. Please tell us specifically why you want to work with the Solarize program. Include the name and address of the firm submitting the proposal, together with the name, address, telephone number, and email address for the authorized representative for the firm. Also include the firm's federal tax identification number, North American Board of Certified Energy Practitioners (NABCEP) certification number(s), and NYSERDA eligible installer number(s). Finally, please include a statement that the proposal is valid for sixty (60) days after receipt. (1000 words max.)

II. Proposing Firm Profile

Section III shall be the firm's detailed profile. As mentioned above, STSW welcomes proposals from single firms, or consortia among partnering firms submitting a joint proposal.

- A. Identify the proposing firm's size and organizational structure within the United States, New York State, and the STSW service area. (500 words max.)

- B. Briefly describe the firm's mission, history and purpose. (500 words max.)

- C. Please provide a) indicators of financial stability, b) current standing with suppliers and subcontractors, c) number of current employees (broken down by number of salespersons, engineers, project managers, and full-time installers and site assessors) and e) any other information you think relevant to demonstrate that the firm has the financial resources and stability to participate in and complete their commitments to this program successfully. (500 words max.)

- D. Describe the demonstrated experience of the firm in developing, designing, and installing residential solar electric systems, and how that would apply to this program. Has your firm received recognition within the industry? (500 words max.)

- E. Describe your experience developing, and financing projects for nonprofit organizations and faith communities. Describe any projects you have completed for multi-family apartment buildings, schools, libraries, fire departments or other. Please include financing, system size, and date of completion. (500 words max.)

- F. Describe your experience with moderate (25-200 kW) and large (200 kW - 2 MW) projects, including how they were financed, what was done in house or subcontracted (e.g. design and engineering). (500 words max.)

- G. Indicate if your firm offers options to purchase, lease and/or become a member in a community solar project (we recognize that the latter is very new, so please indicate broadly how you plan to do this, if you do).

Purchase

Lease

CSS

- H. Provide a statement describing the firm's capability to complete a significant number of installations during and within a reasonable length of time following the sales & marketing period of each campaign. For our service area, this can be expected to range from a low of 150 kW to a high of 1 MW per installer. In responding to the RFP, qualified installers will be asked to specify the capacity they are bidding to install. (500 words max.)
- I. If an expansion of the proposing firm is necessary to handle the maximum capacity being offered, please explain how the firm would expand quickly in any ways needed. If possible, provide two examples of previous experiences that have prepared the firm to be able to expand in this manner. If this proposal is coming from a consortium of two or more firms, please detail how the consortium plans to accommodate the demand and hiring among the partner firms. (500 words max.)
- J. Provide information about employment practices, including average wages for relevant positions and standard benefits (to employees and their families). Our program requires compliance with all New York State, federal laws, and local laws. STSW also strongly encourages and prefers firms that are committed to paying a living wage to full- and part-time employees who are directly involved in the provision of the STSW project, including employees of subcontractors engaged to assist in providing the service.(500 words max.)
- K. Summarize the firm's safety record and practices. (500 words max.)

- L. Provide information on the level of insurance the firm has, such as General Liability and Auto coverage for residential work (including Broad Form Property Damage, Contractual Liability, No Collapse or Underground Exclusions and Stop Gap Coverage), and demonstrate the level of insurance of any and all subcontractors. Please also provide information on your Workers' Compensation coverage, and demonstrate that any and all subcontractors have full Worker's Compensation coverage. (500 words max.)

III. Qualifications of the Project Team (20 points)

- A. Please include documentation of having at least one NABCEP Certified Installation Professional and one NYSERDA eligible PON 2112 installer on staff. (Attach this with form)

- B. Identify key personnel for this project and include information on their expected roles in the day-to-day operations of the STSW project. Please describe their experience, and their licenses and certificates. Key personnel should include at a minimum: Owners/Principals; Project Managers; Engineers; Installers, Presenters at STSW public meetings, and any other people who will regularly interact with or provide data to STSW per the specifications outlined in the Scope of Work (see Exhibit A).

- C. Describe your firm's participation to date in employee training, or certification and credential-granting programs, as well as any training models that you intend to continue or implement.

- D. Please describe your policy for engaging subcontractors for your projects. Describe their role, their value to the project, and provide background information on your management, licensing and oversight of subcontractors.

IV. Sales and Marketing Practices (20 points)

- A. Describe your standard site assessment practices and procedures.

- B. Provide a representative copy of the customer purchase and/or lease contracts you plan to use in the STSW project that include a description of your scope of work, equipment to be installed, annual system production expected from the system, % of annual usage expected to be offset, terms of payment, warranties, and any terms and conditions. If partnering firms are submitting a joint proposal, we encourage the customer contract to be consistent between firms. **(Attach this with form)**
- C. Describe what assistance you provide your customers to ensure they receive the maximum incentives and tax credits available to them. Please explain how you would handle any changes to the NYSERDA incentive amount during the program.
- D. Are you able to introduce potential clients to low-interest loan opportunities and help facilitate a loan application?
- E. Describe your experience in marketing to potential clients in a low-to-moderate income bracket, or to small non-profit organizations.
- F. Please address how you will work with potential Customers who may need a new roof, and whether, for example, you will have a roofing partner you could work with.
- G. Provide references from at least 3 recent residential installations including size, date of installation, and location, with a contact name and telephone number. If the firm has been chosen to partner on a past Solarize campaign or similar community marketing campaign, please include at least one reference from each campaign served. If possible, at least one reference should be from a customer whose solar system was installed within the last year. **(Attach this with form)**

V. Customer Service (25 points)

Describe your enrollment follow up process: how soon do you call leads, and how many times over what period you call until either you succeed or they become a “dead lead”

- B. Describe your general expected average timeline for each installation your firm would undertake for the program and how you would handle any minor delays.
- C. Describe your firm’s practices during installation regarding how you will minimize disruption and the disturbance of neighbors, landscaping, structures, and clients’ living arrangements during preparation, installation, and clean up.
- D. Describe quality control procedures throughout the installation process as well as final testing and sign-off procedures, including punch lists, inspections, and other necessary requirements.
- E. Describe the checkout you provide the homeowner or small business owner, including materials or manuals, project walkthroughs, and/or support for later system performance.
- F. Provide information about your firm’s experience with system monitoring, whether it’s included in your proposal, and the rationale for that. If it is included, please explain how the firm uses this data to provide long-term system performance and quality assurance.
- G. Please provide information on common service calls you receive, and/or warranty issues you’ve experienced to date. Discuss your typical response time on calls, hours of coverage for customer service calls, and process for providing status reports after an incident is logged. Discuss any other problems and reported issues that the firm has experienced to date, and how they have been resolved. List any complaints received by the Better Business Bureau or the New York Attorney General’s office over the last 3 years.

VI. Community Practices (10 points)

- A. Provide information about your firm's involvement within the STSW service area, including professional or volunteer organization memberships and community relationships or any nature.

- B. Describe your firm's sustainability practices, as well as those of subcontractors, significant suppliers, etc. Such practices might include renewable energy powered buildings, waste management and recycling practices, use of local products, and policies to minimize travel-related carbon dioxide emissions from employee commuting, as well as from workday operations.

- C. Please identify your current diversity of workforce and describe your firm's commitments to providing equal employment opportunities.

- D. STSW values well-paying local jobs as a core strategic imperative. While the service area doesn't have a unified living wage standard, evidence showing that an installer partner has policies or practices in support of living wages will be valued in the selection process.

- E. Discuss your anticipated needs for expanding your workforce in response to the demand generated by this campaign.

VII. Appendix (0 points)

The Appendix may include any supporting information, such as resumes, references, or other data that will support your firm’s proposal.

Proposal Scoring and Evaluation

During this RFQ evaluation process, STSW has the right to request and require any clarification it needs in order to understand the Proposer’s information or approach. Proposals will be ranked on a common point scoring system based on the categories outlined above. Finalists will receive the RFP, which will be released on February 15. At the RFP stage ONLY, STSW will then interview selected Proposers. After the evaluation of proposals and interviews, STSW will select several (no set number) Installer Partners based on point scores, interviews, and programmatic needs, and extend offers to each partner in the program. All Proposers will be notified of the selection outcome.

Signature _____

By Signing this Fillable PDF you agree that you have read and agree to all the terms and conditions laid out in the full RFQ

Signature _____

Date _____

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Attachments:

Section III(A): Please include documentation of having at least one NABCEP Certified Installation Professional and one NYSEDA eligible PON 2112 installer on staff.

Section IV(B): Provide a representative copy of the customer purchase and/or lease contracts you plan to use in the STSW project that include a description of your scope of work, equipment to be installed, annual system production expected from the system, % of annual usage expected to be offset, terms of payment, warranties, and any terms and conditions. If partnering firms are submitting a joint proposal, we encourage the customer contract to be consistent between firms.

Section IV(G): Provide references from at least 3 recent residential installations including size, date of issues you’ve experienced to date. Discuss your typical response time on calls, hours of coverage for customer service calls, and process for providing status reports after an incident is logged. Discuss any other problems and reported issues that the firm has experienced to date, and how they have been resolved. List any complaints received by the Better Business Bureau or the 10 New York Attorney General’s office over the last 3 years.