**2016 SOLARIZE MASS (SOLARIZE WCGW) PROGRAM**

communities: windsor, cummington, goshen and worthington

**Request for Proposals Installers of Small-Scale Solar Photovoltaic Systems**

**Installer Proposal Checklist and Application**

posting date: July 27, 2016 <http://www.windsormass.com>“more”

rfp deadline: September 9, 2016 by midnight eastern daylight time.

questions: solarizewcgw@gmail.com subject line: Q> Solarize WCGW RFP Bids

email rfp to: solarizewcgw@gmail.com subject line:Solarize WCGW RFP Bids

mail rfp to: The Town of Windsor, 1890 Route 9, Suite 1, Windsor, MA 01270 attention: Solarize WCGW RFP Bids

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**1. OPPORTUNITY SUMMARY**

Solarize Mass Windsor, Cummington, Goshen & Worthington(“Solarize WCGW”) is releasing a request for proposals (“RFP”) for solar photovoltaic (“PV”) installer(s) to participate in the 2016 Solarize Mass Program. This Program is run in partnership with the Massachusetts Clean Energy Center (“MassCEC”) and the Department of Energy Resources (“DOER”) to drive community adoption of solar photovoltaic (PV) projects through group purchasing model that includes a tailored community-based marketing effort within the selected Massachusetts communities (each a “Community,” together the “Communities”).

Solarize WCGW seeks proposals from Installers that can provide residential and small-scale commercialsolar PV installations under both direct purchase and third-party ownership models. It is expected that customers who purchase a system under the program will receive competitive tiered pricing that results in a reduction in the total system purchase price as more people contract for solar PV in the Community. Customers that enter into Power Purchase Agreements (PPAs) or leases will receive a greater financial incentive from the Installer as higher tiers of aggregate capacity are reached.Quality of the Installer proposal, proposed equipment, proposed pricing, ability to partner with the community, previous performance providing similar services, installation practices, and reference checks will be factors in the selection process.

deadline:Proposals must be received by **September 9, 2016 by midnight eastern daylight time.**

Late proposals will NOT be accepted. Proposals shall be submitted in via email [solarizewcgw@gmail.com] “Solarize WCGW RFP Bids”must appear in the subject line of the email submission or if sent by mail, to the above address, the envelope must be clearly marked “ATTENTION: Solarize WCGW RFP Bids.”

# PROGRAM OVERVIEW, SELECTION AND GOALS

**Program Description and Goals**

Solarize WCGW is led by municipal officials, local volunteers, MassCEC, DOER and a competitively selected Installer to implement a solar aggregation and education program on behalf of the community.

Solarize Mass (Solarize WCGW) has developed the following goals for the program:

1. Expand community awareness about the advantages of solar PV adoption.
2. IncreaseSolar PV installation in our four town area.(Windsor, Cummington, Goshen & Worthington)

These goals will be accomplished through a number of activities. In particular, price reductions will be achieved through economies of scale by aggregation solar PV projects, and by reducing customer acquisition costs -- including advertising and customer education – which can be a significant portion of the total cost of a solar PV system. By educating the local community, streamlining marketing efforts, and aggregating sales, Solarize WCGW will help make solar PV more accessible and affordable for local residents and businesses.

***Roles and Responsibilities***

The Solarize WCGW program will be a partnership that includes a number of organizations and individuals that will work closely in order to provide a high-quality, streamlined customer experience for residents and businesses in Solarize WCGW. The following table provide a brief overview of the expected roles and responsibilities of organizations under Solarize WCGW.

|  |  |
| --- | --- |
| MassCEC & DOER | * Competitively select Solarize communities * Provide technical consultant support for Solarize Mass Solarize Mass (Solarize WCGW) * Provide marketing and education grants and materials to communities |
| Community | * Installer selection * Volunteer support for outreach and education * Community Solar Coach coordinates community volunteers |
| Installer | * Provides free site assessments * Customer service and follow-up * Offers system pricing based on Solarize WCGW pricing * Provides turnkey system installation |
| Homeowners | * Contract with Installers for solar installations * Encourage others to explore going solar |

# 3. INSTALLER SCOPE OF WORK

Installers selected for the 2016 Solarize Massachusetts Program will have primary responsibility for managing leads, performing site assessments, providing general customer service, contracting, installation, and all other functions typically associated with the sales and installation process. Installers will also play an integral role in public outreach and educational events coordinated under SolarizeWCGW.

Once selected, the Installer will work with the Solarize WCGWrepresentatives to finalize a marketing strategy specific to the community. Shortly thereafter, the Installer will participate in a Meet the Installer presentation, where the Installer will be introduced to the Community. Installers are encouraged to provide additional training for the Community Solar Coach -- the lead volunteer coordinating the program -- on the Installer’s operations or other relevant topics.

As leads are identified during the outreach process, the Installer will provide site assessments (as appropriate) and system designs for individual solar PV projects. The site assessment will evaluate a site’s suitability for solar PV, including shading, onsite load, and any electrical, structural, or mechanical issues that may increase the price of the solar PV project relative to the baseline proposed price. The Installer will be required to offer price proposals to potential program participants that include a detailed breakdown of any price adders that are in addition to the base pricing, clearly demonstrating that the customer is receiving pricing consistent with the Solarize WCGW Installer contract. The Installer will maintain and track customer contact and contract stats, installation progress, resolution to non-feasible sites and prepare data for end of project final report. The Installer will communicate with the Solarize WCGW representatives at a minimum of every other week (by email and phone calls).

All projects must **meet the requirements** outlined in the Solarize Mass Program Minimum Technical Requirements.

See [www.SolarizeMass.com](http://www.SolarizeMass.com) for more information regarding these requirements.

Upon contracting, the Installer will be responsible for providing each customer with a turnkey service, which includes securing all local permits, and completing the project within one year of contract signing. In addition, the Installer will be expected to provide information regarding net metering, the sale of SRECs, and any other federal or state incentives available to the customer.

*Review and add comments if needed: Attachment B: Contract with Towns -and- Attachment C: MassCEC-Installer Terms and Conditions.*

non-feasible leads: The Installer **must identify a process for handling leads that have non-feasible sites for solar PV.**

Examples may include offering individuals with non-feasible sites more information on other technology options, such as energy efficiency or solar hot water, or requesting potential assistance in any Solarize Massachusetts volunteer opportunities.

*Describe in RFP Narrative Section XI B.*

weekly data: The Installer will also provide to the community representatives with weekly data as requested, including but not limited to, the number of community initial interest contacts, number of site visits completed, number of feasible sites, number of signed contracts, and contracted capacity. The selected Installer will also participate in project management calls (every other week) and will agree to share all communication email lists.*Describe in RFP Narrative Section XI.*

final report:The Installer will be required to provide the Community and MassCEC with a final report outlining the total number of contracted customers within the community and the resulting Adders and associated cost prices that will be associated with each installation.*Describe process in RFP Narrative Section XI.*

# 4. EXPECTED TIMELINE

A preliminary timeline for the Solarize WCGW program is outlined below(dates are subject to change.)

|  |  |
| --- | --- |
| **2016 Solarize Mass (Solarize WCGW) schedule** | **tentative timeline** |
| RFP for Solar Installers Released | July 27, 2016 |
| Installer Proposals Due | September 9, 2016 |
| Threshold review of Installer Proposals | September 13-16, 2016 |
| Community-Installer Interview Day | October 10-14, 2016 |
| Announce Selected Solar PV Installers | October 27-31, 2016 |
| Outreach Strategy Development with Installer | November 1-10, 2016 |
| Meet the Installer Presentations | November 1-10, 2016 |
| Customer Sign-Up Period Begins | November 1-10, 2016 |
| Customer Sign-Up Period Ends | April 30, 2017 |

# 5. INSTALLER SELECTION PROCESS

Upon receipt of all Installer proposals, Solarize WCGW will perform a threshold review to verify that all proposals are complete. Installer proposals that are received after the RFP submittal deadline will not be accepted. Proposals will be evaluated individually by a designated Technical Consultant and the Community Review Team.[[1]](#footnote-2)

The Community Review team will be responsible for reviewing Installer proposals (along with a Technical Consultant) and initially selecting high-ranking Installers who will be invited to interview with Solarize WCGW representatives. Interviews will be conducted during October 2016. At the completion of interviews, the Community Review Team, with the assistance of the Technical Consultant, will select their preferred Installer. Solarize WCGW will then contract with the selected Installer and begin the implementation of the program.

# 6. PROPOSAL REQUIREMENTS

Solarize WCGW, at its sole discretion, may determine whether a proposal is complete.

SUBMIT BY DEADLINE: September 9, 2016 by midnight eastern daylight time.

* Please note that Solarize WCGW will not accept electronic signatures, unless validated by a third party service such as DocuSign, EchoSign, or other service.
* “Solarize WCGW RFP Bids” must appear in the email subject line or clearly marked on the envelope.See email/mailing address on the first page**.**

In order for an Installer to be eligible to submit a proposal, the Installer must:

1. EXPERIENCE: Demonstrate experience and proficiency in solar PV installations. The Installer must have installed a minimum of ten (10) solar PV projects in Massachusetts. *Describe in RFP Narrative Sections VII, VIII and IX.*

**2.**BUSINESS, TAX AND INSURANCE DOCUMENTATION: Be, at minimum, a professional contractor license to conduct business in Massachusetts. Possess current State required forms such as Tax Compliance Certification M.G.L. c. 62C, §49A and vendor insurance certificate will also be a requirement. *Include documentation in Attachment G.*

**3.** ELECTRICIAN LICENSE: Include on the project team at least one electrician holding a valid and current Massachusetts electrical license enabling them to perform any electrical work on the solar PV projects. *Include documentation in Attachment F.*

**4.** PROPOSAL REVIEW: Submit a proposal that meets all of the threshold review criteria outlined in *Section 7 Evaluation Criteria*before the proposal deadline.

**See RFP Installer Proposal Checklist on page 7.**

* In order to streamline the proposal review process, additional documentation provided beyond the attachments and addendums listed above will not be reviewed by Community Review Team.
* In the event of a public records request, certain elements of the proposals will be deemed confidential. *See Section 10.*
* Once a proposal has been submitted, the Installer should not contact any program volunteers, the Community Solar Coach, or the Municipal Representative of the participating Community.
* If it is determined that an Installer has made contact with members of the community volunteer team after submitting a proposal (outside of the formal RFP review process), the Installer’s proposal may be deemed invalid.

**7. EVALUATION CRITERIA**

All proposals must meet program objectives and must be responsive to the relevant scope of work and application requirements outlined above. Proposals will be evaluated on the general criteria below:

* threshold requirements: Proposals must meet a threshold review before they will be provided to the Community External Review Team. To meet the threshold review, the following criteria must be met:
  + Complete proposal and attachments must be received by Solarize WCGW before the RFP submittal deadline. Proposals received after the deadline will not be accepted;
  + Installer has installed at least 10 solar PV projects in Massachusetts;*Describe in RFP Narrative Sections VII, VIII and IX*
  + The proposed Purchase Price to the customer **must** decrease by each of the five tiers. If a PPA/Lease is offered, there must be a Lease/PPA financial incentive available as higher tiers are reached; *Describe in RFP Narrative Section V.*

Once an Installer proposal passes threshold review, it will be evaluated by the corresponding Community Review Team and Technical Consultant based on the following criteria:

* overall quality and value: overall quality of proposal and partnership potential with Solarize WCGW;
* experience: degree of Installer’s experience and proficiency in the scope of work, including demonstrated experience in developing, designing and installing small-scale solar PV systems. In addition, experience of Installer team in outreach activities;
* marketing plan: ability of proposal to drive community adoption of solar PV projects and reduce prices of small-scale PV installations;
* implementation: ability to provide timely, quality customer service and installations as well as ability to communicate and work in partnership with the chosen Solarize WCGW.
* price structure: quality and simplicity of pricing proposal for Purchase Price ($/kW) and if applicable, Lease/PPA Price ($/kWh) or financial incentive. In addition, the value offered by the proposed equipment, price adders, price escalators, and contract terms and conditions;
* demonstration of innovative concepts: additional consideration will be given to Installers that can provide innovative business models, or have options for other technologies such as Solar Hot Water and energy efficiency.

# 8. ANTICIPATED TERM OF CONTRACT:

* Installers will be required to contract with Solarize WCGW. It is essential, in order to meet the program goals and timelines, that Installers are prepared to execute a contract with Solarize WCGW soon after their selection. Therefore, each applicant Installer must review the Terms and Conditions outlined in the *Draft* Solarize WCGW *Installer Contract* (Attachment B) and provide comments on those Terms and Conditions at the time of application.
* Solarize WCGW’s selection of an Installer pursuant to this RFP does not mean that Solarize WCGW accepts all aspects of the proposal, modifications to which may be requested and agreed to during contract negotiations.
* Solarize WCGW anticipates that the term of the contract with each Installer will commence in November 2016 and continue for one year after the last system is contracted under the program.

# 9. QUESTIONS AND CONTACT INFORMATION

Please submit all questions by email to: Solarize WCGW solarizewcgw@gmail.com

subject line: Q> Solarize WCGW RFP Bids

# 10. NOTICE OF PUBLIC DISCLOSURE

As a public entity, Solarize WCGW is subject to Massachusetts’ Public Records Law, codified at Chapter 66 of the Massachusetts General Laws. Thus, any documentary material, data, or other information received Solarize WCGW from an applicant is a public record subject to disclosure. Materials that fall under certain categories, however, may be exempt from public disclosure under a statutory or common law exemption.

# 10. NOTICE OF PUBLIC DISCLOSURE (con’t.)

confidential: Solarize WCGW considers the following information to be confidential and may be redacted if Solarize WCGW receives a public records request:

Attachment A: Individual cost adders and associated prices (note the aggregate adder pricing will be made available for the sub-categories outlined. This only applies to the non-selected installers. The selected installer cost adder proposal is subject to records requests.

* 1. Attachment D: Template standard contracts/agreements for purchase projects, Lease/PPA projects, or financing.
  2. Attachment F: Licenses or certifications of key members of the Installer team.
  3. Installer Proposal Checklist and Application Form: *Section VII.Company Information* and *Section X. Marketing Strategy* sections.

# 11. CONTRACTUAL REQUIREMENTS

Upon the selection of a proposal, Solarize WCGW and the selected Installer will execute a contract, which will set forth the respective roles and responsibilities of the parties. *See Attachment B for a draft version of this contract*.*Note separate contracts will be executed by each Town (Windsor, Cummington, Goshen and Worthington).*

# 12. COMMUNITY MARKETING AND OUTREACH PLANS

Installers are encouraged to review the proposed Solarize WCGW marketing and outreach plans, posted at: <http://www.masscec.com/installer-resources-solarize-massachusetts>

# 13. WAIVER AUTHORITY

Solarize WCGW reserves the right, at its sole discretion, to waive minor irregularities in submittal requirements, to modify the anticipated timeline, to request modifications of the application, to accept or reject any or all applications received, and/or to cancel all or part of this RFP at any time prior to awards.

# 14. DISCLAIMER

This RFP does not commit Solarize WCGW to award any funds, pay any costs incurred in preparing an application, or procure or contract for services or supplies. Solarize WCGW reserves the right to accept or reject any or all applications received, cancel or modify the RFP in part or in its entirety, or change the application guidelines, when it is in its best interests.

**2016 SOLARIZE MASS (SOLARIZE WCGW) PROGRAM**

communities: windsor, cummington, goshen and worthington

**RFP Installer Proposal Checklist**

|  |  |
| --- | --- |
| **installer name:** | **date: / / 2016** |
| **Internal: date/time rfp received:** | **date: / / 2016 time:** |

**installer proposal checklist**(Include the following items in application submittal)

**Application Forms &Narrative Sections: I-XI** (Optional XII)

*Special Attention*

**Section III:** List or attached proposed equipment specifications/sheets.

**Section XI:** Include sample of weekly customer tracking form.

**B:** Include example email communication template, or if applicable, materials that would be provided to residents whose site is determined to be non-feasible site for solar.

**Authorized Applicant’s Signature and Acceptance**: Form requires signature (no electronic signatures, unless validated by a third party service such as DocuSign, EchoSign, or other service.

*Attachments*

**Attachment A:** Pricing Contingencies /Cost Adders

**Attachment B:** Review the Solarize Mass-WCGW*– Installer Contract Template*, and provide any comments.

**Attachment C:** Review the MassCEC – Installer Terms and Conditions, and provide any comments. (Separate Document File)

**Attachment D:** Attach a copy of your template contract for a direct purchase project, a contract for a Lease and/or PPA option (if applicable), and contract language for a project receiving financing option (if applicable).

**Attachment E:** Provide sample marketing documents provided to residential, nonprofit and business customers.

**Attachment F:** Attach resumes or licenses (if pertinent) of key members of the Installer team.

**Attachment G:**  Attach professional contractor license to conduct business in Massachusetts, state required forms such as Tax Compliance Certification M.G.L. c. 62C, §49A and vendor insurance certificate will also be a requirement.

In order to streamline the proposal review process, additional documentation provided beyond the attachments and addendums listed above will not be reviewed by Community Review Team. In the event of a public records request, certain elements of the proposals will be deemed confidential.

Once a proposal has been submitted, the Installer should not contact any program volunteers, the Community Solar Coach, or the Municipal Representative of the participating Community. If it is determined that an Installer has made contact with members of the community volunteer team after submitting a proposal (outside of the formal RFP review process), the Installer’s proposal may be deemed invalid.

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**2016 SOLARIZE MASS (SOLARIZE WCGW) PROGRAM**

communities: windsor, cummington, goshen and worthington

**Installer RFP Application Forms: Sections I-VI**

NOTE: Please type in responses - do NOT handwrite.

**I. installer primary point of contact**

|  |  |
| --- | --- |
| installer company |  |
| primary contact name |  |
| primary contact email |  |
| primary contact phone number |  |
| primary contact text number |  |
| website |  |

**II. proposed company partners/team**

Please complete as appropriate. There may be more than one partner in each category.

|  |  |
| --- | --- |
| srec aggregator/broker company partner |  |
| lease and/or ppa company partner(s) |  |
| additional financing company partner |  |

|  |  |
| --- | --- |
| additional installer company **partner #1** |  |
| name |  |
| email |  |
| phone number |  |
| text number |  |

|  |  |
| --- | --- |
| additional installer company **partner #2** |  |
| name |  |
| email |  |
| phone number |  |
| text number |  |

**III. proposed equipment specifications**

A. Identify the equipment that would be used for the default basic solar PV system package.

the basic package should

* Not include any optional equipment cost-adders.
* Meet National Electric Code rapid-shutdown requirement basic solar PV system package (NEC 690.12).
* Meet 2012 International Fire Code reflective and weather-resistant labeling for residential PV array. (IFC-605.11)

|  |  |  |
| --- | --- | --- |
| **major component** | **manufacturer** | **model number** |
| inverter(s) |  |  |
| pv modules |  |  |
| mounting system |  |  |
| production meter |  |  |
| data acquisition system  (if standard offering) |  |  |

|  |  |  |
| --- | --- | --- |
| **basic solar pv package** | **YES** | **NO** |
| nec rapid shutdown requirement is met (nec 690.12). |  |  |
| labels are compliant with 2012 international fire code (ifc-605.11). |  |  |

B. List **all** proposed equipment to be used during the course of the program.

If selected, during the course of the Solarize Mass program, the Installer may only alter the list of approved equipment upon pre-approval by the Solarize WCGW Team and Technical Consultants.

|  |  |  |
| --- | --- | --- |
| **major component** | **manufacturer** | **model number** |
| inverter(s) |  |  |

**III. proposed equipment specifications (con’t.)**

B. List **all** proposed equipment to be used during the course of the program. (con’t.)

|  |  |  |
| --- | --- | --- |
| **major component** | **manufacturer** | **model number** |
| pv modules (Please also include any premium modules noted in Attachment A) |  |  |
| mounting system |  |  |
| production meter |  |  |
| data acquisition system |  |  |

**IV. PROPOSED SERVICES**

* Complete all fields noted below. Where applicable, clarify Yes / No.
* If further clarification is needed, list any applicable notes below associated field.

|  |  |
| --- | --- |
| 1. **site assessments and installation**(Using installer data from previous solar PV installations) | **#** |
| Expected average number of salespeople active in community during sign-up period |  |
| Full-time |  |
| Part-time |  |
| Expected average number of physical site assessments conducted per week during sign-up period |  |
| Average estimated number of installations per month |  |
| Installer average time (in months) between project contracting and interconnection |  |

|  |  |  |
| --- | --- | --- |
| 1. **installer provides the following services:** | **YES** | **NO** |
| Installer offers direct purchase option for residential, systems |  |  |
| Installer requires up-front deposit at time of direct purchase contracting |  |  |

*If yes: Required deposit amount:* **$**

*Describe the circumstances in which the deposit would not be returned to the system owner if installation does not commence; if not detailed in the sample contract you have provided in Attachment D.*

**IV. PROPOSED SERVICES (con’t.)**

|  |  |  |
| --- | --- | --- |
| **B. installer provides the following services (con’t):** | **YES** | **NO** |
| Installer offers financing options for residential direct purchase systems |  |  |
| *If yes: Add description, see Section IX titled “Installer Team Members and Partners.”* | | |
| Installer offers lease option for residential systems |  |  |
| *If yes: What is the historic average percentage of installations: \_\_\_\_\_lease versus \_\_\_\_direct purchase systems.* | | |
| Installer offers Power Purchase Agreement (PPA) option for residential systems |  |  |
| *If yes: What is the historic average percentage of installations: \_\_\_\_\_PPA versus \_\_\_\_\_direct purchase systems.* | | |
| Installer requires up-front deposit at time of lease and/or PPA contracting |  |  |

*If yes: If yes: Required deposit amount:* **$**

*Describe the circumstances in which the deposit would not be returned to the system owner if installation does not commence; if not detailed in the sample contract you have provided in Attachment D.*

|  |  |  |
| --- | --- | --- |
| Installer offers direct purchase option for commercial or nonprofit systems |  |  |

*If yes: Include any minimum size requirements, average installation timeframe and/or other specifications as needed:*

|  |  |  |
| --- | --- | --- |
| Installer requires up-front deposit at time of direct purchase contracting |  |  |

*If yes: If yes: Required deposit amount:* **$**

*Describe the circumstances in which the deposit would not be returned to the system owner if installation does not commence; if not detailed in the sample contract you have provided in Attachment D.*

|  |  |  |
| --- | --- | --- |
| Installer offers lease option for commercial or nonprofit systems |  |  |

*If yes: Specify if there are any minimum size requirements, lease provider(s), and other specifications as needed.*

|  |  |  |
| --- | --- | --- |
| Installer offers PPA option for commercial or nonprofit systems |  |  |

*If yes: Specify any minimum size requirements, size requirements if needed, PPA provider(s), and other specifications as needed.*

|  |  |  |
| --- | --- | --- |
| Installer offers community shared solar option. |  |  |

*If yes: Clarify model specifics:*

**IV. PROPOSED SERVICES (con’t.)**

|  |  |  |
| --- | --- | --- |
| **B. installer provides the following services (con’t.):** | **YES** | **NO** |
| Installer has experience installing solar PV projects on properties with condo associations, and is open to contracting with a condo unit owner or condo association during the course of the program. |  |  |
| *If yes: Please provide responses to these three scenarios:* | | |
| 1. *Single owner for 2-3 unit building* |  |  |
| 1. *Separate condo owners for 2-3 unit building* |  |  |
| 1. *Condo association of 4+ unit condos* |  |  |
| Installer has experience installing solar PV projects on multi-family buildings, and is open to contracting with a unit owner or multi-family building owner during the course of the program. |  |  |

*If yes: What are the requirements for installer to contract with building owner or other parties.*

*Requirements for an installer to contract with condo unit owner or condo association (ie. ownership of roof, legal approval from condo association). Describe the timeline for installations on properties with condo association, based on your past experiences*

|  |  |  |
| --- | --- | --- |
| Installer has experience installing solar PV systems on property where it is the intent of the owner of remain “Off the Grid” requiring a storage solution. |  |  |

*If yes: Describe the requirements for installer to contract with building owner.*

|  |  |  |
| --- | --- | --- |
| **SITE-SPECIFIC** |  |  |
| Installer subcontracts installation electrical or other work. |  |  |

*If yes, \_\_\_% of systems would be installed with the assistance of a subcontractor.*

*\_\_\_% of the installation labor would the subcontracted.*

|  |  |  |
| --- | --- | --- |
| Installer provides installation services | **YES** | **NO** |
| on ground or pole-mounted solar PV systems |  |  |
| on slate-shingle roofs |  |  |
| on flat roofs or rubber membrane roofs |  |  |
| of roof snow-guards or pest control devices if requested |  |  |
| If system owner needs to re-roof during lifetime of the solar PV system, installer provides services to remove and re-install solar PV array |  |  |

*If yes, clarify expected hourly and/or other fee for services.*

|  |
| --- |
| **additional services** |

* At project completion, describe the training your company provides to the homeowner on the solar PV system.
* Describe the take-away documents does your company provide to the homeowner, such as a manual, 3-line diagrams or other guidance.
* Clarify installer process for recommending an aggregator or broker and assisting the system owner with the SREC registration process.

**IV. PROPOSED SERVICES (con’t.)**

|  |
| --- |
| **B. installer provides the following services (con’t.):** |
| **WARRANTIES**Describe length and terms of: |
| Workmanship Warranty - |
| Product Warranties - |
| Terms and Conditions for an Extended Workmanship and/or Product Warranties - |
| *If there are any additional labor costs on equipment warranty outside of workmanship warranty, please provide estimated cost: $* |

**V. INSTALLER [TIERED] PRICING PROPOSALS: Purchase**

Installer should include a standard agreement for a Purchase project and a standard agreement for a Lease and/or PPA project (if applicable) as part of Attachment D.

* The bid must include a dollar per watt ($/W) Purchase Price that will reduce as higher tiers are reached.
* **The base price should include all installation costs, which includes system design, permitting, applicable materials and equipment, transportation, labor, a stamped structural letter, and all equipment and workmanship warranties for a default base solar PV system.**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **TIERS** | **1** | **2** | **3** | **4** | **5** | **6** |
| **1kW-25kW** | **>25kW-50kW** | **>50kW-100kW** | **>100kW-200kW** | **>200kW -400kW** | **>400 kW** |
| **purchased**  **price ($/w)** |  |  |  |  |  |  |

**INSTALLER [TIERED] PRICING PROPOSALS: Lease**

*Please note that a Lease and/or PPA is not required in order to apply to the Solarize Mass program.*

* optimal production: If offering a Lease and/or PPA, provide a Lease and/or PPA price for a system that produces 90% of optimal production (see Solarize Mass and Mass Solar Connect Minimum Technical Requirements for how to determine optimal production.)

*Briefly Describe:*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **% of optimal system production** | **100%** | **95%** | **90%** | **85%** | **80%** |
| lease and/or ppa price ($/kwh) |  |  |  |  |  |
| escalator (%) |  |  |  |  |  |

* escalator (%): The Lease/PPA escalator is the rate by which the price will increase over the term of the contract.
* price:If a Lease and/or PPA option is being offered, the Lease and/or PPA Price must be provided in the form of a dollar per kilowatt hour ($/kWh) price.

**V. INSTALLER [TIERED] PRICING PROPOSALS: Lease (con’t.)**

*Briefly explain any variations on the Lease and/or PPA model that will be provided:*

*Outline the maximum range for pricing escalators that will be present in contracts:*

* tiers:Provide the incremental value that a Lease and/or PPA customer would receive as each new tier is reached, **NOT the cumulative value received (including prior tier incentive.**
* production:Please provide a summary of Lease and/or PPA Pricing based on alternate system production.
* price:Indicate what the price would be for a typical contract with the different production percentages, including the escalator.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **TIERS** | **1** | **2** | **3** | **4** | **5** | **6** |
| **1kW-25kW** | **>25kW-50kW** | **>50kW-100kW** | **>100kW-200kW** | **>200kW -400kW** | **>400 kW** |
| lease and/or ppa ($/kwh) |  |  |  |  |  |  |

* financing option: (e.g., srec pre-purchase, loans, etc.). *Briefly Describe:*

money down: Indicate whether the typical customer will be required to put money down up front in order to lock in the Lease/PPA contract.*Briefly Describe:*

* incentive:While the Lease and/or PPA Price is expected to remain the same throughout the program, the bid should include a financial incentive (such as a rebate, check card, other incentive, etc.) that is received by Lease and/or PPA customers as higher tiers are reached. *Briefly Describe:*

**VI. EXPECTED HIGH-USE PRICING CONTINGENCIES / COST ADDERS**

For the cost adders referenced below, clarify the expected percent of residential solar PV projects contracted under the Program will use the cost adder and associated additional cost. **In addition, add cost adders in Attachment A**. that are expected to be used in more than fifty (50) percent of all residential solar PV projects contracted under the Program.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **cost adder name** | **expected percent**  **of systems with**  **cost adder (%)** | **added cost ($/watt)**  **if applicable** | **added flat rate cost ($)**  **if applicable** | **added cost**  **($/ kwh)**  **if applicable** |
| automatic reporting to the production tracking system | XX% | $X.XX or n/a | $X.XX | $X.XX or n/a |
| roof structural reinforcement |  |  |  |  |
| upgrade electrical service |  |  |  |  |
| upgrade to micro-inverters |  |  |  |  |
| upgrade to premium panels |  |  |  |  |
| other |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

🡺**Please complete ATTACHMENT A:** In order to clarify all cost adders that may increase the total cost for a potential purchase and (if applicable) a Lease and/or PPA project (above the base tier pricing outlined in Section VI above).

**2016 SOLARIZE MASS (SOLARIZE WCGW) PROGRAM**

communities: windsor, cummington, goshen and worthington

**Installer RFP Application Narrative**

|  |
| --- |
| **VII. EXECUTIVE SUMMARY (MAXIMUM 1 PAGE)** |

Identify why your company [the Installer] is applying to the Solarize WCGW RFP: summarize the highlights, key features and distinguishing points of the proposal, as well as, any unique challenges identified by the Installer, along with proposed solutions.

|  |
| --- |
| **VIII. COMPANY INFORMATION (MAXIMUM 1 PAGE)** |

* company capacity:Describe the Installer Company, including company size, financial stability, location, capacity for work, and access to various supply chains.
* experience:Highlight relevant experience, skills and capabilities that would be used to undertake this Program, including, but not limited to, demonstrated experience through the sale and installation of solar PV projects in Massachusetts.
* references:Provide references for at least ten (10) of its projects within the state.

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| **IX. INSTALLER TEAM MEMBERS AND PARTNERS** |

* team:Identify all members of the project team, including but not limited to, partners assisting in project financing, customer service, outreach, project installations, and SREC aggregation or brokerage.
* attachment f: Include résumés and copies of any licenses, if applicable, of all key individuals on the project.

Note Installers are welcome to partner together to submit a proposal.

proposals may include the following:

* Identify any third-party financing partner(s) that will facilitate the Installer’s ability to provide a Lease and/or PPA Pricing, and the duration of the existing partnership (if applicable).
* Identify any financing partner(s) that will facilitate the Installer’s ability to provide customers with financing options, and the duration of the existing partnership.
* Identify any partnerships you provide to your customers to facilitate the sale of their SRECs.

*Optional: Propose a partner or contact who can install solar hot water systems, other renewable energy technology, or other energy efficiency measures.*

|  |
| --- |
| **X. MARKETING STRATEGY** |

Outline a marketing plan that builds off of the Solarize WCGW marketing plan that would be used to motivate residents to contract for solar PV under the program. Include:

* Description of specific activities you would engage to support the community marketing strategy.
* Plan for communication with the volunteer team.
* Ideas on how to leverage Solarize WCGW outreach to generate leads that are more likely to move forward to contracts.
* Any experiences the Installer has had with residential sales outreach efforts in the past.

🡺In Appendix E: Provide sample marketing documents which can be provided to residential customers.

|  |
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| **XI. PROGRAM OPERATIONS PLAN** |

* plan:Describe a plan to provide good customer service for the participating residents, including timely lead contact, site assessments to interested customers, installation services, and SREC aggregation. Attach a sample of weekly customer tracking form.
* weekly data: The Installer will also provide to the community representatives with weekly data as requested, including but not limited to, the number of community initial interest contacts, number of site visits completed, number of feasible sites, number of signed contracts, and contracted capacity. The selected Installer will also participate in project management calls (every other week) and will agree to share all communication email lists.
* leads:Include intake process for customer leads, method for screening and contacting sites, and process for managing an increased volume of leads and projects.
* resident education:Outline how the installation process will be explained to the customer. Include example marketing documents that could be provided to residential customers.
* coordination:Describe a quality assurance process for the solar PV installations and outline the process for managing any permits, inspections, and the interconnection process with the local utility.
* final report:Please note, the Installer will be required to provide the Community and MassCEC with a final report outlining the total number of contracted customers within the community and the resulting Adders and associated cost prices that will be associated with each installation.

|  |
| --- |
| **XI. A. PROJECT INSTALLATION TIMELINE** |

* Provide an expected timeline for the average residential, nonprofit or commercial lead under the Program, from initial contact to contracting, to installation.
* Provide recommendations on ways the community volunteer team could assist with expediting the resident contracting process under the program.
* Outline how Installer will engage with customers regarding project installation timeline, and correlation with current state and federal incentive structure.

|  |
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| **B. COMMUNICATION METHOD FOR LEADS THAT DO NOT HAVE A FEASIBLE FOR SOLAR PV** |

* Outline the process by which the Installer team will communicate with leads that do not have feasible sites for solar PV

(i.e. primarily through email or phone communication).

* Provide sample email material template or materials that would be provided.
* Describe the process by which the installer will communicate with the customer (even with a feasible site for solar PV) might be assisted in other renewable energy or energy efficiency efforts through the Program. For example, this may include solar hot water, additional thermal technologies, weatherization, or other energy related efforts.

|  |
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| **C. GEOGRAPHIC PROXIMITY** |

* Provide a plan to address the Installer’s geographic proximity to Solarize WCGW and how this will affect the services provided.

|  |
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| **XII. INSTALLER GROUP PROPOSAL (Optional)** |

* If applicable, demonstrate the benefit of responding to the RFP as a group, a history of partnering, and outline how communication, marketing, and outreach efforts will be deployed.

**AUTHORIZED APPLICANT’S SIGNATURE AND ACCEPTANCE**

The undersigned is a duly authorized representative of the Applicant listed below.

* The Applicant has read and understands the Request for Proposals (“RFP”) requirements.
* The undersigned acknowledges that all of the terms and conditions of the RFP are mandatory in accordance with Attachment C.
* The Applicant understands that all materials, except certain materials that may be exempt under a statutory or common law exemption, submitted as part of the application are subject to disclosure under the Massachusetts Public Records Law, as explained in Section 10 of the RFP, and acknowledges and agrees that Solarize WCGW has no obligation, and retains the sole discretion to fund or choose not to fund the application set forth herein, and that Solarize WCGW receipt of the application does not imply any promise of funding at any time.
* The Applicant understands that, if selected by the Community, the Applicant and Community will detail and execute a contract that outlines the respective roles and responsibilities of the parties.

I certify that the statements made in this application, including all attachments and exhibits, are true and correct to the best of my knowledge.

APPLICANT: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

print name of applicant organization

NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

signature of authorized representative print name

TITLE: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DATE: \_\_\_\_\_/\_\_\_\_\_\_/2016

**Attachment A: Pricing Contingencies / Cost Adders *Solarize WCGW page 1 of 2***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  | purchased projects | | lease/ppa projects |  |
| factors | increased cost ($/watt) | flat rate adders ($) | increased cost ($/kwh) | description of cost adder / scope of work |
| **site specific** |  |  |  |  |
| Multiple roof arrays |  |  |  |  |
| Flat roof / Tilt racking |  |  |  |  |
| Standing seam metal roof |  |  |  |  |
| Steep roof (define) |  |  |  |  |
| Tall roof (define) |  |  |  |  |
| Pole or ground mounted system |  |  |  |  |
| Trenching (if not included in pole or ground mounted system cost) |  |  |  |  |
| No access to attic |  |  |  |  |
| Tree removal |  |  |  |  |
| Slate shingles |  |  |  |  |
| Squirrel / pest control system |  |  |  |  |
| Snow guards |  |  |  |  |
| **site specific sub-total** |  |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **structural** |  |  |  |  |
| Reinforcing rafters |  |  |  |  |
| Stamped structural letter | *n/a* | *n/a* | *n/a* | Stamped structural letter includes in the base price |
| **Structural Sub-Total** |  |  |  |  |
| **electrical** |  |  |  |  |
| Line Side tap |  |  |  |  |
| Electrical panel upgrade |  |  |  |  |
| Electrical sub-panel |  |  |  |  |
| Meter upgrade/change |  |  |  |  |
| Interior conduit run |  |  |  |  |
| **electrical sub-total** |  |  |  |  |

**Attachment A: Pricing Contingencies / Cost Adders *Solarize WCGW page 2 of 2***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | purchased projects | | lease/ppa projects |  |
| factors | increased cost ($/watt) | flat rate adders ($) | increased cost ($/kwh) | description of cost adder / scope of work |
| **other** |  |  |  |  |
| Data Acquisition System: Automatic Reporting to PTS |  |  |  |  |
| Micro-inverters |  |  |  |  |
| Micro-inverter internal monitoring |  |  |  |  |
| DC Optimizers |  |  |  |  |
| High Efficiency modules (define) |  |  |  |  |
| Extended warranty (if applicable) |  |  |  |  |
| Annual maintenance (if applicable) |  |  |  |  |
| Small system adder (define) |  |  |  |  |
| Large system cost subtraction |  |  |  |  |
| SREC pre-purchase subtraction |  |  |  |  |
| **other sub-total** |  |  |  |  |
|  |  |  |  |  |
| **total additional cost** |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

***page 1 of 3***

***Attachment B: Sample (********Separate for Each Town):*Solarize Massachusetts Program [Community] –Letter of Agreement**

Provide comments if needed.

November XX, 2016

*Re:Solarize Massachusetts Program*

Dear Installer,

Congratulations on your selection as the solar PV Installer for the Solarize Massachusetts Program in the [Town]. [Town] is excited to collaborate with you to increase outreach, education, and adoption of solar photovoltaic (“PV”) systems within the [Town] of \_\_\_\_\_\_\_\_\_ (the “Community”).

This letter (the “Letter Agreement”) will set out the mutual understanding between [Town]and [\_\_\_\_\_] (the “Installer”) regarding the Installer’s and associated team’s participation in this program, and shall be effective as of 11/XX/2016 (the “Effective Date”).

1. ***Solarize Massachusetts Program***
2. Installer and [City/Town] agree to work cooperatively to implement the 2016 Solarize Massachusetts Program (the “Program”) in the Community which will drive the community adoption of solar PV projects through a partnership with the Community.
3. Installer agrees that the term of this Letter Agreement begins as of the Effective Date and shall continue until one year after the final solar PV system application approval date (the “Term”) under the Program.
4. ***Community Commitment***

[Town] agrees to provide Installer with the following, provided that the Installer meets the terms and conditions in Section 3 of this Letter Agreement:

1. Allow the Installer, in partnership with the Community, to utilize the [City/Town] logo for marketing and outreach purposes directly related to the Program in the selected Community and benefit from all goodwill associated therewith, in order for the Installer and Community to market to customers and attract participation in the Program;
2. Assist the Installer with solar education programs in the Community; and
3. Participate in a bi-weekly meeting between MassCEC, the Community Solar Coach and the Installer.
4. ***Installer Commitment & Deliverables***

The Installer agrees to meet the following terms and conditions for the duration of the Program:

1. Installer and Community agree to work cooperatively to implement the 2016 Solarize Massachusetts Program (the “Program”) in the Community which will drive the community adoption of solar PV projects through a partnership with the Community;
2. Installer agrees that the term of this Letter Agreement begins as of the Effective Date and shall continue until the final PV system contracted under the Program is installed;
3. Refer to the Program as “Solarize Massachusetts” in all community outreach materials and marketing efforts;
4. Provide customers within the Community with pricing available at the appropriate tiered level, and provide tiered pricing reductions, as outlined in the Installer’s competitive bid, to all customers under the Program. Appropriate tiered pricing must be applied to projects at the time that the contracted capacity level is met for the Tier. Installer’s and associated partner’s contracts with the customers must include a “not to exceed” cost or lease payment/PPA payment through [Date of End of Program], at which time the cost will be reconciled based on the appropriate tier that has been reached;
5. Utilize equipment listed in the *Pricing Proposal* (Attachments A) submitted by Installer for all projects contracted during the Program. If an equipment substitution is required during the course of the Program, the Installer is responsible for getting the MassCEC appointed Technical Consultant approval in advance of contracting of the system;
6. Include a disclaimer on all Installer customer intake forms and media (such as website and sign-up sheets) that outlines how customer contact information will be used under the Program and provide the customer with the ability to opt out of communications unrelated to solar PV installations under the Program;
7. Provide objective information to enable customers to choose either the purchase, lease/power purchase agreement (if offered), or innovative financing (if offered) option;
8. Track the total contracted capacity under the Program;
9. Track the pricing associated with each project, and detail why a specific project requires a cost adder;

***page 2 of 3***

***Attachment B: Sample (********Separate for Each Town):*Solarize Massachusetts Program [Community] –Letter of Agreement**

1. If there are cost adders associated with a project, Installer must provide customer with a breakout of the cost adders required and their cost above the base pricing. This can be provided at or before contract signing directly in the Customer proposal or on a copy of the Cost Adder Form developed by MassCEC;
2. Provide weekly metrics to the Community and MassCEC, which shall include, but is not limited to, the number of leads generated, the number of feasible project sites identified, the number of contracted projects, and the tracked information maintained by Installer pursuant to subsection h) and i);
3. Agree and acknowledge that all contracted projects will meet the Solarize Mass and Mass Solar Connect Program requirements in the Solarize Mass and Mass Solar Connect Program Manual, and Minimum Technical Requirements;
4. Coordinate with the Community to develop a plan to recommend alternative opportunities (i.e. through energy efficiency or other renewable energy projects) for customers without feasible sites for a solar PV project;
5. Provide a mechanism to share the status of leads captured through the program such that they will be available to the core community volunteer team on a regular basis, and;
6. Make a reasonable effort to track why customers decide not to contract for a solar PV project;
7. If requested by MassCEC, Installer shall agree and accept certain program terms with MassCEC including, but not limited to, to the use of MassCEC’s logos, website, and the provision of certain program data.
8. ***Terms & Conditions***
   1. This Letter Agreement may be terminated by [Town] at any time for a material breach of any term of the Letter Agreement.
   2. [City/Town] may terminate this Letter Agreement in the event of loss of availability of sufficient funds for the purposes of this Letter Agreement or in the event of an unforeseen public emergency or other change of law mandating immediate [City/Town] action inconsistent with performing its obligations under this Letter Agreement.
9. ***Required Legal Terms & Conditions***
10. compliance with law. Installer agrees to comply with all applicable Federal and State statutes rules, and regulations, including but not limited to, promoting fair employment practices or prohibiting employment discrimination and unfair labor practices and shall not discriminate in the hiring of any applicant for employment nor shall any qualified employee be demoted, discharged, or otherwise subject to discrimination in the tenure, position, promotional opportunities, wages, benefits, or terms and conditions of their employment because of race, color, national origin, ancestry, age, sex, religion, disability, handicap, sexual orientation, or for exercising any rights afforded by law.
11. Installer agrees to provide copies of State required forms such as Tax Compliance Certification M.G.L. c. 62C, §49A and vendor insurance certificate.
12. assignment. Installer shall not assign or in any way transfer this Letter Agreement without the prior written consent of [Town].
13. public records. As a public entity, is subject to the Massachusetts Public Records Law (set forth at M.G.L. c.66) and thus documents and other materials made or received by the town and/or its employees are subject to public disclosure.
14. waivers. Conditions, covenants, duties, and obligations contained in this Agreement may be waived only by written agreement between the parties. Forbearance or indulgence in any form or manner by a party shall not be construed as a waiver, nor in any way limit the remedies available to that party.
15. counterparts. This Letter Agreement may be executed in two or more counterparts, and by different parties hereto on separate counterparts, each of which will be deemed an original, but all of which together will constitute one and the same instrument.
16. amendments, entire agreement, and attachments. All conditions, covenants, duties and obligations contained in this Letter Agreement may be amended only through a written amendment signed by the Installer and [Town]. The Parties understand and agree that this Letter Agreement supersedes all other verbal and written agreements and negotiations by the parties regarding the Program set forth herein.

[*Remainder of page intentionally left blank. Signature page follows]*

***page 3 of 3***

***Attachment B: Sample (********Separate for Each Town):*Solarize Massachusetts Program [Community] –Letter of Agreement**

[Town] is excited to work with [Installer] to launch this innovative business model and increase solar adoption within the [Town]. If you accept the terms and conditions referenced herein, please sign and return one original copy of this letter to the attention of First Last, [Town specific title] [Street Name], [Town], MA [Zip].

Very truly yours,

|  |  |
| --- | --- |
| Town of [Town] Official  Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date: \_\_\_\_/\_\_\_\_\_\_/2016 |  |

***Accepted & Agreed***

Installer Company: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_/\_\_\_\_\_\_/2016

**Attachment C:** Review the MassCEC – Installer Terms and Conditions, and provide any comments

Provide comments if needed. See separate attachment.

**Attachment D:** Attach a copy of your template contract for a direct purchase project, a contract for a Lease and/or PPA option (if applicable), and contract language for a project receiving financing option (if applicable)

**Attachment E:** Provide sample marketing documents provided to residential, nonprofit and business customers.

**Attachment F:** Attach resumes or licenses (if pertinent) of key members of the Installer team.

**Attachment G:** Attach 1) professional contractor license to conduct business in Massachusetts

2) State required forms such as Tax Compliance Certification M.G.L. c. 62C, §49A and

3) Vendor Insurance Certificate.

1. No member of the External Review team can be affiliated (either directly employed or contracted for employment) with a solar PV installation company. [↑](#footnote-ref-2)