# Appendix A: Solarize Philly Installer Response Form

Solarize Philly Installer RFP Response Form

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| **PART I. APPLICANT’S POINT OF CONTACT** | | |
| Name: | | Title: |
| Telephone:    -   - | Cell Phone:    -   - | Email: |

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| **PART II. APPLICANT INFORMATION** | | | | | | | | | | | | | |
| Legal Name of Business: | | | | | | | FEIN: | | | | | | |
| Year Business Established: | | | | | | | Commercial Activity License #: | | | | | | |
| Philadelphia Contractor License #: | | | | | | | Philadelphia Electrical Contractor License #: | | | | | | |
| Legal Structure (check one):  **☐** For-Profit Corporation **☐** Non Profit Corporation **☐** Limited Partnership **☐** General Partnership  **☐** Limited Liability Company **☐** Sole Proprietorship **☐** Other: | | | | | | | | | | | | | |
| Headquarters Address - Street: | | | | | | | | | | | | | |
| City: | | | | | County: | | | | | | State: | Zip: | |
| Warehouse Address - Street: | | | | | | | | | | | | | |
| City: | | | | | County: | | | | | | State: | Zip: | |
| Main Telephone:    -   - | | Main Fax:    -   - | | | | | | Website: | | | | | |
| **Current Employees:**  # of Full-time Employees: | | | | | | # of Part-time Employees: | | | | | | | |
| # of Employees with NAPCEP or UL certification:  # of Employees with PA Electrician license: | | | | | | # of Sales Representatives:  # of Install Crews: | | | | | | | |
| **Demographic** | | | | **Percent of Ownership** | | | | | | **Percent of Total Full-time Employees** | | | |
| Minority (non-white) | | | |  | | | | | |  | | | |
| Women | | | |  | | | | | |  | | | |
| Disabled | | | |  | | | | | |  | | | |
| Resident of Philadelphia | | | |  | | | | | |  | | | |
| Returning Citizens\* | | | |  | | | | | |  | | | |
| \*As defined in Code Section 19-2604(9): “Returning Citizen. A person previously convicted of a felony, or who was incarcerated for any conviction, or who is currently on probation or parole for any conviction.” | | | | | | | | | | | | | |
| **Management:** List proprietor, partners, directors - 100% of ownership must be shown. Use a separate sheet if necessary. | | | | | | | | | | | | | |
| **Name** | **Position Title** | | | | | | **Employer and Business Address** | | | | | | **% Owned** |
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| **Subsidiaries/Affiliates:** List subsidiaries and affiliates. Use a separate sheet if necessary. | | | | | | | | | | | | | |
| **Business Name** | | | **Business Address** | | | | | | **FEIN Number** | | | | |
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| **Business Relationships:**  Name and address of Business’ Bank:  Explain the terms of any Letter of Credit or other financing you have to cover your operations prior to customer payment: | | | | | | | | | | | | | |
| Name and address of entity providing bonding:       / Coverage:       / Policy #: | | | | | | | | | | | | | |
| Name and address of Liability Insurer:       / Coverage:       / Policy #: | | | | | | | | | | | | | |
| Name and Address of Worker's Compensation Insurer:       / Coverage:       / Policy #: | | | | | | | | | | | | | |
| Is the Business or its management involved in any pending lawsuits, regulatory proceedings or other legal actions involving the business? **☐** No **☐** Yes  If yes, explain: | | | | | | | | | | | | | |
| Have you or any officer of your company been involved in bankruptcy or insolvency proceedings? **☐** No **☐** Yes  If yes, explain: | | | | | | | | | | | | | |

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| **PART III. APPLICANT’s SOLAR PV INSTALLATION EXPERIENCE** | | | | | |
| **Residential Solar PV Installation History (total):**  Number of PV systems installed in 2016:  Number of PV systems installed in 2017:  Number of PV systems installed in 2018: | | | | Total capacity of systems installed in 2016:       kWDC  Total capacity of systems installed in 2017:       kWDC  Total capacity of systems installed in 2018:       kWDC | |
| **Residential Solar PV Installation History (Philadelphia only):** | | | | | |
| Number of PV systems installed in 2016:  Number of PV systems installed in 2017:  Number of PV systems installed in 2018: | | | | Total capacity of systems installed in 2016:       kWDC  Total capacity of systems installed in 2017:       kWDC  Total capacity of systems installed in 2018:       kWDC | |
| **References: Residential Customers (required)**  Please provide the contact information for three previous residential customers as references.  Finalists will be required to submit an additional list of 10-20 past projects as references with customer contact information that may be randomly evaluated by a third party inspector for quality assurance. | | | | | |
|  | **Name** | **Address** |  | **Telephone** | **Email** |
| 1. |  |  |  | -   - |  |
| 2. |  |  |  | -   - |  |
| 3. |  |  |  | -   - |  |
| **Commercial Solar PV Installation History (total):**  Number of PV systems installed in 2016:  Number of PV systems installed in 2017:  Number of PV systems installed in 2018: | | | | Total capacity of systems installed in 2016:       kWDC  Total capacity of systems installed in 2017:       kWDC  Total capacity of systems installed in 2018:       kWDC | |
| **Commercial Solar PV Installation History (Philadelphia only):** | | | | | |
| Number of PV systems installed in 2016:  Number of PV systems installed in 2017:  Number of PV systems installed in 2018: | | | | Total capacity of systems installed in 2016:       kWDC  Total capacity of systems installed in 2017:       kWDC  Total capacity of systems installed in 2018:       kWDC | |
| **References: Commercial Customers (if applicable)**  Please provide the contact information for three previous residential customers as references (if applicable). | | | | | |
|  | **Name** | **Address** | | **Telephone** | **Email** |
| 1. |  |  | | -   - |  |
| 2. |  |  | | -   - |  |
| 3. |  |  | | -   - |  |

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| **PART IV. APPLICANT’S PROPOSED HARDWARE** | |
| Provide information about the hardware (modules, inverters, racking systems and other options) you intend to use. The spec sheets for this hardware are required as Exhibit B. List your “standard” hardware and your “premium” hardware. Please select one equipment option for each category of modules, inverters, and racking. This same list will be used in the Proposed Pricing section (Part VI below). In the “Comments” sections, please add any important information about when the specific hardware may or may not be appropriate. | |
| **Standard Residential PV Module** | |
| Module Manufacturer: |  |
| Module Rated Wattage (STC): |  |
| Current $/watt price to you: |  |
| Country of Origin: |  |
| **Comments. Please explain why you chose this option:** | |
| **Premium Residential PV Module** | |
| Module Manufacturer: |  |
| Module Rated Wattage (STC): |  |
| Current $/watt price to you: |  |
| Country of Origin: |  |
| **Comments. Please explain why you chose this option:** | |
| **Are you certified to install any specific brand of modules (e.g. SunPower)?** | |
| **Please list and describe:** | |
| **Standard Residential Inverter** | |
| Inverter Manufacturer: |  |
| Inverter Model #: |  |
| Inverter Wattage (AC): |  |
| Current $/watt price to you: |  |
| Country of Origin: |  |
| **Comments. Please explain why you chose this option:** | |
| **Residential Flat Roof Racking System** | |
| Racking Manufacturer: |  |
| Racking Model #: |  |
| Racking Type/Description: |  |
| Treatment for Roof Penetrations: |  |
| **Comments. Please explain why you chose this option:** | |
| **Residential Pitched Roof Racking System** | |
| Racking Manufacturer: |  |
| Racking Model #: |  |
| Racking Type/Description: |  |
| Treatment for Roof Penetrations: |  |
| **Comments. Please explain why you chose this option:** | |

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| **PART V. APPLICANT’S PROPOSED FINANCING FOR SOLARIZE PHILLY CUSTOMERS** |
| Provide information about financing solutions that you intend to use. If not your own financing, please provide a reference and contact information for a representative at the financing company you partner with and intend to offer to Solarize Philly participants. Please provide three references of your customers who have used this financing before.  If you propose to work with multiple lenders, please provide the same information for the additional loans as an attachment. |

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| 1. **Loan Terms** | | | | | | | | |
|  | **Product Name** | | **Term Length (Years)** | **Interest Rate (%)** | | **Required**  **Down Payment**  **($ or %)** | **Dealer/**  **Financing Fee**  **($ or %)** | **# of your customers who have used this financing in the last 12 months** |
| 1. |  | |  |  | |  |  |  |
| 2. |  | |  |  | |  |  |  |
| 3. |  | |  |  | |  |  |  |
| **Representative at Financing Company** | | | | | | | | |
| **Name** | | **Address** | | | **Telephone** | **Email** | | |
|  | |  | | | -   - |  | | |
| **References for Customers who have used this Financing** | | | | | | | | |
|  | **Name** | **Address** | | | **Telephone** | **Email** | | |
| 1. |  |  | | | -   - |  | | |
| 2. |  |  | | | -   - |  | | |
| 3. |  |  | | | -   - |  | | |
| **Comments:** | | | | | | | | |

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| 1. **PPA Terms** | | | | | | | | | | |
|  | **Product Name** | | | **Price ($/kWh)** | **Term Length (Years)** | | **Escalator (%)** | **Required**  **Down Payment**  **($ or %)** | **Dealer/**  **Financing Fee**  **($ or %)** | **# of your customers who have used this financing in the last 12 months** |
| 1. | |  | |  |  | |  |  |  |  |
| 2. | |  | |  |  | |  |  |  |  |
| 3. | |  | |  |  | |  |  |  |  |
| **Representative at Financing Company** | | | | | | | | | | |
|  | | **Name** | **Address** | | | **Telephone** | | | **Email** | |
| 1. | |  |  | | | -   - | | |  | |
| **References for Customers who have used this Financing** | | | | | | | | | | |
|  | | **Name** | **Address** | | | **Telephone** | | | **Email** | |
| 1. | |  |  | | |  | | |  | |
| 2. | |  |  | | |  | | |  | |
| 3. | |  |  | | |  | | |  | |
| **Comments:** | | | | | | | | | | |

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| 1. **Lease Terms** | | | | | | | | | |
|  | **Product Name** | | **Price ($/kWh or $/month)** | **Term Length (Years)** | | **Escalator (%)** | **Required**  **Down Payment**  **($ or %)** | **Dealer/**  **Financing Fee**  **($ or %)** | **# of your customers who have used this financing in the last 12 months** |
| 1. |  | |  |  | |  |  |  |  |
| 2. |  | |  |  | |  |  |  |  |
| 3. |  | |  |  | |  |  |  |  |
| **Representative at Financing Company** | | | | | | | | | |
|  | **Name** | **Address** | | | **Telephone** | | | **Email** | |
| 1. |  |  | | | -   - | | |  | |
| **References for Customers who have used this Financing** | | | | | | | | | |
|  | **Name** | **Address** | | | **Telephone** | | | **Email** | |
| 1. |  |  | | | -   - | | |  | |
| 2. |  |  | | | -   - | | |  | |
| 3. |  |  | | | -   - | | |  | |
| **Comments:** | | | | | | | | | |

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| **PART VI. APPLICANT’S PROPOSED PRICING FOR SOLARIZE PHILLY CUSTOMERS** |
| Please propose a breakdown of system installation sizes (kW range) and pricing ($/watt) for residential solar projects. If you would propose a different breakdown than prescribed here, please provide an attached document with your proposal in a similar format and a brief explanation for your departure from the tiers provided. |

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| **Residential Projects** | |
| **1-3**  **kWDC** | $   /  wattDC |
| **>3-6**  **kWDC** | $    /  wattDC |
| **>6-10**  **kWDC** | $    /  wattDC |
| **>10**  **kWDC** | $    /  wattDC |

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| **A. Proposed System Adders** | |
| Please propose a schedule of standard additional costs (adders) that may be incurred for project complexities. We understand that adders may vary project by project. You can show adders either as a dollar amount or a cost per watt, as appropriate. You will be expected to provide explanation for adders priced out of line with these proposed standards. | |
| **Adder Description** | **Cost** |
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| **Comments:** | |

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| **B. Proposed Referral Incentives** |
| Describe any existing referral incentives your company offers. |
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| Propose referral incentives that you would offer to Solarize Philly participants, these could include discounts based on the total number of contracts, referral fees, or otherwise. |
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| **PART VII. ADDITIONAL PROGRAM INPUT** |
| Provide information on any other requirements you have about system installations. |
| 1. Are there any roof types that you will not work with? |
| 1. What associated electrical work are you willing to do for a customer? |
| 1. If you notice significant opportunities to improve your customer’s energy efficiency, what do you do? |
| 1. Describe the workmanship warranty agreement (if any) that will be offered to customers and the provisions to address scheduled and corrective maintenance, system monitoring and communications protocols, as well as associated customer costs for each (this may also be included as an attachment): |
| 1. Elaborate on your current lead generation and customer intake processes: |
| 1. Elaborate on your current process for performing site assessments, system designs, and customer proposals: |
| 1. Elaborate on your current sales process: |
| 1. Name of the customer relationships management software that you use: |
| 1. Describe ways in which a joint marketing strategy between your company and Solarize Philly can expand the number of residential solar PV projects within the City. Include ideas about leveraging community outreach to generate strong leads. Identify any potential community partners that might assist in deploying or enhancing the marketing strategy. If applicable, cite specific examples of marketing services that will be provided, items or marketing materials that you will offer (lawn signs, flyers, direct mail, videos featuring Solarize customers, etc.), or funding/resources that will be allocated to complement and support Solarize Philly’s efforts or to produce these marketing materials: |
| 1. Describe your company policies and procedures for ensuring safety for the workers on site and for the customers who are present at the worksite: |
| 1. Additional comments on how your company proposes to engage with the Solarize Philly recruitment and intake process: |

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| **PART VIII. CAPACITY FOR SOLAR INSTALLATIONS** | |
| 1. Describe your ability to handle a large number of leads and projects over a short timeframe: | |
| 1. Number of site assessments capable of completing per week: | |
| 1. Number of sales visits capable of completing per week: | |
| 1. Average number of days from contract signing to Permission to Operate (PTO): | |
| 1. Installation Capacity: Number of Systems Installed per month: | kWDC Installed per month: |
| * 1. Is installation capacity figure above based on current staff or does it assume new hires: ☐ Current ☐ New   2. If New Hires, how many New Hires are assumed: | |
| 1. Describe a contingency plan if Solarize Philly workload exceeds your expectations and staff capacity: | |
| 1. Maximum Total Desired Workload for Solarize Philly over next 18 months: # of Systems:       kWDC: | |
| 1. Minimum system size you are willing to install:       kWDC | |
| 1. Maximum System Size you are willing to install:       kWDC | |

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| **PART IX. SIGNATURE** |
| The undersigned hereby certifies:   1. That he or she has the legal authority to sign this application on behalf of the Applicant. 2. That the Applicant is duly organized and in good standing under the laws of the jurisdiction in which it is organized. 3. That all tax returns required to be filed in any jurisdiction have been duly filed, and all taxes due in respect of the Applicant have been duly paid (except as provided under Section 3.5). 4. That the information contained in this Application and the attached Exhibits is complete, true and correct. 5. That the financial statements that accompany this Application as an Exhibit fairly present the financial condition of the Applicant when written. Since the date of the most recent financial statements, there has been no material adverse change in the Applicant’s financial condition. 6. That the Applicant agrees to notify the Philadelphia Energy Authority promptly of any material changes to the Application and the attached Exhibits. 7. That the Applicant hereby authorizes the Philadelphia Energy Authority to make all inquiries it deems necessary to verify the accuracy of the Application and the attached Exhibits. The Applicant authorizes any individual, including the Applicant's attorney and accountant, or any credit reporting agency, or any other entity, to furnish the Philadelphia Energy Authority with any information it possesses with respect to the Applicant, the Application and the attached Exhibits. 8. That the price or prices quoted in the Proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Applicant or any of its agents, representatives, owners, employees, or parties in interest. 9. The Applicant understands and acknowledges that, until a final selection is made under the RFP, PEA may enter into discussions with the Applicant to negotiate the terms of its proposal in an effort to reach the most favorable arrangement for Solarize Philly’s participants. Moreover, PEA reserves the right to (i) reject any or all proposals; (ii) waive defects or irregularities in any proposal; (iii) discontinue discussions at any time and for any reason; (iv) correct inaccurate awards; (v) change the timing or sequence of activities related to the Solarize Philly program; (vi) modify, suspend or cancel the Solarize Philly program; and (vii) condition, modify or otherwise limit the mandate awarded pursuant to the RFP. 10. By submitting this proposal, the Applicant represents and warrants that, if it is selected under this RFP, it will comply with the terms of the RFP and will perform all of the duties and obligations of a selected installer in the Solarize Philly program. |
| **Applicant / Company**:    By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Name:  Title:  Date: |

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| **PART X. EXHIBITS THAT MUST ACCOMPANY THIS APPLICATION** | |
| For an Application to be accepted as complete, it must be accompanied by all of the following Exhibits: | |
| **Exhibit A:** | Copies of Philadelphia Contractor and Electrical Contractor Licenses, NABCEP certifications (or certification numbers) and UL certifications (or certification numbers) listed in Part II. |
| **Exhibit B:** | Spec sheets for all hardware listed in Part IV. |
| **Exhibit C:** | Installer’s audited financial reports for the three most recent fiscal years. If audited statements are not available, include the business federal tax returns for the three most recent years. |
| **Exhibit D:** | Current certificate of insurance (COI) |
| **Exhibit E:** | Applicant’s Diverse Business and Local Hiring Plan. Though not required, Applicant is invited to explain your strategy for creating a robust diverse local solar workforce, which could include the Applicant’s ability to commit to actions such as but not limited to the following:   1. Recruit applicants for new positions who reside in the City of Philadelphia, who identify as minority, women, disabled, returning citizens, veterans, and/or who have completed Philadelphia-based solar training programs. 2. Support Philadelphia-based solar training programs, by, for example, advising for curriculum development, hosting trainees as interns, and providing guest speakers for classes and field trips. Please describe any previous experience considering applicants from workforce development initiatives. |
| **Exhibit F:** | A redacted version of a proposal and contract you presented to a recent customers with no visible customer information. |
| **Exhibit G:** | A redacted version of a Power Purchase Agreement you presented to a recent residential customer (if you offer a PPA, either through your company or a partner). |
| **Exhibit H:** | A redacted version of a Lease Agreement you presented to a recent residential customer (if you offer a Lease, either through your company or a partner). |
| **Exhibit I:** | A redacted version of a Loan Agreement you presented to a recent residential customer (if you offer a Loan, either through your company or a partner). |
| **Exhibit J:** | Requested Exceptions to Contract Terms and Conditions |

**Filing Deadline:** The completed Solarize *Philly Installer Response Form* and the Exhibits must be delivered to the Philadelphia Energy Authority no later than **3:00 p.m.** on **Monday, March 25, 2019.**

Submit your completed *Response Form* and the required Exhibits by email to [solarize@philaenergy.org](mailto:solarize@philaenergy.org)