# Appendix A: Solarize Philly Contractor Response Form

**Solarize Philly Contractor Response Form**

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| **PART I. RESPONDENT’S POINT OF CONTACT (Required)** | | |
| Name: | | Title: |
| Telephone: - - | Cell Phone: - - | Email: |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **PART II. RESPONDENT INFORMATION (Required)** | | | | | | | | | |
| Legal Name of Business: | | | | | FEIN: | | | | |
| Year Business Established: | | | | | Commercial Activity License #: | | | | |
| Philadelphia Contractor License #: | | | | | Philadelphia Electrical Contractor License #:  (if held by separate company, specify) | | | | |
| 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: |
| Philadelphia-area Location (if different than above)  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.” | | | | | | | | | |

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| **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 (only for Respondents proposing to serve the commercial market)  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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| **MARKETS SERVED BY THE RESPONDENT (Required)** |
| Indicate the Solarize Philly market segment(s) the Contractor proposes to serve. Select all that apply.  ☐ Residential (if selected, complete Parts III - VII for Residential)  ☐ Low-and moderate-income (LMI) residential (if selected, complete Parts VII - XII for LMI Residential)  ☐ Commercial (if selected, complete Parts XIII - XVII for Commercial) |

**PARTS III - VII: RESIDENTIAL**

(Required if the Respondent is proposing to serve residential market segment)

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| **PART III. RESPONDENT’S SOLAR PV INSTALLATION EXPERIENCE: RESIDENTIAL (Required)** | | |
| **Residential Solar PV Installation History (total):** |  |  |
| Number of PV systems installed in 2017:  Number of PV systems installed in 2018: Number of PV systems installed in 2019:  Number of PV systems installed in 2020: | Total capacity of systems installed in 2017:  Total capacity of systems installed in 2018:  Total capacity of systems installed in 2019:  Total capacity of systems installed in 2020: | kWDC  kWDC  kWDC  kWDC |
| **Residential Solar PV Installation History (Philadelphia only):** | | |
| Number of PV systems installed in 2017:  Number of PV systems installed in 2018:  Number of PV systems installed in 2019:  Number of PV systems installed in 2020: | Total capacity of systems installed in 2017:  Total capacity of systems installed in 2018:  Total capacity of systems installed in 2019  Total capacity of systems installed in 2020 | kWDC  kWDC  kWDC  kWDC |
| Minimum system size you are willing to install: kWDC | | |
| Maximum system size you are willing to install: kWDC | | |

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| **PART IV. REFERENCES: RESIDENTIAL (required)**  Please provide the contact information for three previous residential customers as references.  All Respondents seeking to serve the residential segment will be required to submit an additional list of 10-20 past residential projects completed in Philadelphia as references with customer contact information that may be randomly evaluated by a third-party inspector for quality assurance. This project list should be attached as Exhibit L. | | | | |
|  | **Name** | **Address** | **Telephone** | **Email** |
| 1. |  |  | - - |  |
| 2. |  |  | - - |  |
| 3. |  |  | - - |  |

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| **PART V. RESPONDENT’S PROPOSED HARDWARE: RESIDENTIAL (required)** | |
| 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 (if your company offers solar PV installs with premium modules). 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): |  |

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| --- | --- |
| 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:** | | |

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| **Residential Pitched Roof Racking System** | |
| Racking Manufacturer: |  |
| Racking Model #: |  |
| Racking Type/Description: |  |
| Treatment for Roof  Penetrations: |  |
| **Comments. Please explain why you chose this option:** | |
| **Solar Canopy/ Pergola** | |
| Model and manufacturer: |  |
| Module type: |  |
| Racking Type/Description: |  |
| Treatment for Roof  Penetrations: |  |
| **Comments. Please explain why you chose this option:** | |
| **Solar Battery Storage (Optional - complete this section if your company offers storage options)** | |
| Energy Storage Product Used: |  |
| Total Energy: |  |
| Usable Energy: |  |
| Voltage Range (Charge): |  |
| Voltage Range (Discharge): |  |
| Absolute Max. Voltage: |  |
| Max Charge/Discharge Current: |  |
| Max Charge/Discharge Power: |  |
| Peak Power  (Only Discharging): |  |
| Peak Current  (Only Discharging): |  |
| Protection Feature: |  |
| Price per kWh (all inclusive): |  |
| **Comments. Please explain why you chose this option:** | |

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| **PART VI. RESPONDENT’S PROPOSED FINANCING FOR SOLARIZE PHILLY CUSTOMERS: RESIDENTIAL** |
| Select one of the following:  ☐ Respondent does not offer financial products, but still intends to offer installation services. (Skip to section VII, if selected this option)  ☐ Respondent or a third-party partner offers financial products. If selected this option, provide information about financing solutions that you intend to offer to Solarize Philly customers in the market segment or segments that you are proposing to serve, including loan, Power Purchase Agreement (PPA), and/or lease options. If not your own financing, please provide a reference and contact information for a representative at the partnered financing company. Please provide three references of your customers who have used this financing before. If you plan to offer multiple financing options for a single segment, please provide the same information for additional products as an attachment. |

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| 1. **Loan Terms (attach additional sheets if needed)** | | | | | | | |
|  | **Product**  **Name** | **Term Length (Years)** | **Interest Rate** | **Required Down Payment** | **Dealer Financing Fee**  **($ or %)** | **# of customers who have used this financing in the past 12 months** | **Underwriting Criteria** |
| 1 |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |
| **Representative(s) at Financing Company** | | | | | | | |
|  | **Product/**  **Company** | **Name of Representative** | | **Address** | | **Email** | **Telephone** |
| 1 |  |  | |  | |  |  |
| 2 |  |  | |  | |  |  |
| 3 |  |  | |  | |  |  |
| **References for Customers who have used this Financing** | | | | | | | |
|  | **Product used** | **Customer Name** | | **Address** | | **Email** | **Telephone** |
| 1 |  |  | |  | |  |  |
| 2 |  |  | |  | |  |  |
| 3 |  |  | |  | |  |  |
| **Comments on loan terms.** | | | | | | | |

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| 1. **PPA Terms (attach additional sheets if needed)** | | | | | | | | |
|  | **Product**  **Name** | **Term Length** | **Price**  **($/kWh)** | **Escalator (%)** | **Required Down Payment**  **($ or %)** | **Dealer Financing Fee**  **($ or %)** | **# of customers who have used this financing in the past 12 months** | **Underwriting Criteria** |
| 1 |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |
| **Representative(s) at Financing Company** | | | | | | | | |
|  | **Product/**  **Company** | **Name of Representative** | | **Address** | | | **Email** | **Telephone** |
| 1 |  |  | |  | | |  |  |
| 2 |  |  | |  | | |  |  |
| 3 |  |  | |  | | |  |  |
| **References for Customers who have used PPA** | | | | | | | | |
|  | **Product used** | **Customer Name** | | **Address** | | | **Email** | **Telephone** |
| 1 |  |  | |  | | |  |  |
| 2 |  |  | |  | | |  |  |
| 3 |  |  | |  | | |  |  |
| **Comments on PPA terms.** | | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1. **Lease Terms (attach additional sheets if needed)** | | | | | | | | |
|  | **Product**  **Name** | **Term Length** | **Price**  **($/kWh)** | **Escalator (%)** | **Required Down Payment**  **($ or %)** | **Dealer Financing Fee**  **($ or %)** | **# of customers who have used this financing in the past 12 months** | **Underwriting Criteria** |
| 1 |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |
| **Representative(s) at Financing Company** | | | | | | | | |
|  | **Product/**  **Company** | **Name of Representative** | | **Address** | | | **Email** | **Telephone** |
| 1 |  |  | |  | | |  |  |
| 2 |  |  | |  | | |  |  |
| 3 |  |  | |  | | |  |  |
| **References for Customers who have used Lease** | | | | | | | | |
|  | **Product used** | **Customer Name** | | **Address** | | | **Email** | **Telephone** |
| 1 |  |  | |  | | |  |  |
| 2 |  |  | |  | | |  |  |
| 3 |  |  | |  | | |  |  |
| **Comments on lease terms.** | | | | | | | | |

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| **PART VII. RESPONDENT’S PROPOSED PRICING FOR SOLARIZE PHILLY RESIDENTIAL CUSTOMERS (required)** | |
| Please propose a breakdown of system installation sizes (kW range) and pricing ($/watt). 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.  Respondents should provide pricing excluding PEA’s program fees, and PEA will evaluate the customer-facing pricing as the submitted price plus the planned program fee. The program fees for new Phase will be finalized during PEA’s review of the RFP responses. | |
| **Residential Projects** | |
| **1-3 kWDC** | $ /  wattDC |
| **>3-6 kWDC** | $ /  wattDC |
| **>6-10 kWDC** | $ /  wattDC |
| **>10 kWDC** | $ /  wattDC |
| **Solarize Philly Program Fee** | |
| In Phase 4, PEA collected $0.20 per watt for residential projects and $0.05 per watt for commercial projects. PEA did not collect a program fee from SSGP projects. PEA is considering offering a reduced program fee for leads generated by Contractor. Please provide any comments on the program fee here. | |
| **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** |
|  |  |
|  |  |
|  |  |
|  |  |
| **Comments.** | |

**PARTS VIII - XII: LMI RESIDENTIAL**

(Required if Respondent is proposing to serve the LMI residential market segment)

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| **PART VIII. RESPONDENT’S SOLAR PV INSTALLATION EXPERIENCE THROUGH PROGRAMS THAT SERVED THE LMI MARKET (Optional)** | | |
| **LMI Residential Solar PV Installation History (total):** | |  |
| Number of PV systems installed in 2017:  Number of PV systems installed in 2018: Number of PV systems installed in 2019:  Number of PV systems installed in 2020: | Total capacity of systems installed in 2017:  Total capacity of systems installed in 2018:  Total capacity of systems installed in 2019:  Total capacity of systems installed in 2020: | kWDC  kWDC  kWDC  kWDC |
| **Comments.** | | |
| **LMI Residential Solar PV Installation History (Philadelphia only):** | | |
| Number of PV systems installed in 2017:  Number of PV systems installed in 2018:  Number of PV systems installed in 2019:  Number of PV systems installed in 2020: | Total capacity of systems installed in 2017:  Total capacity of systems installed in 2018:  Total capacity of systems installed in 2019  Total capacity of systems installed in 2020 | kWDC  kWDC  kWDC  kWDC |
| **Comments.** | | |
| Minimum system size you are willing to install: kWDC | | |
| Maximum system size you are willing to install: kWDC | | |

|  |  |  |  |  |
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| **PART IX. REFERENCES: LMI RESIDENTIAL (Optional)**  Please provide the contact information for three previous residential customers as references who were served through a program specifically designed for LMI households.  Respondents seeking to serve the LMI residential segment will be required to submit an additional list of 10-20 past residential projects completed in Philadelphia as references with customer contact information that may be randomly evaluated by a third-party inspector for quality assurance. This project list should be attached as Exhibit L. | | | | |
|  | **Name** | **Address** | **Telephone** | **Email** |
| 1. |  |  | - - |  |
| 2. |  |  | - - |  |
| 3. |  |  | - - |  |

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| **PART X. RESPONDENT’S PROPOSED HARDWARE: LMI RESIDENTIAL (required)** | |
| 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. This same list will be used in the Proposed Pricing section (Part XII below). In the “Comments” sections, please add any important information about when the specific hardware may or may not be appropriate.  ☐ If Respondent is also proposing to serve the broader residential market segment and intends to use the same equipment, check this box and the equipment specs do not need to be re-listed here. | |
| **Residential PV Module for LMI Projects** | |
| 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:** | |
| **Residential Inverter for LMI Projects** | |
| Inverter Manufacturer: |  |
| Inverter Model #: |  |
| Inverter Wattage (AC): |  |
| Current $/watt price to you: |  |
| Country of Origin: |  |
| **Comments. Please explain why you chose this option:** | |
| **Flat Roof Racking System of LMI Projects** | |
| Racking Manufacturer: |  |
| Racking Model #: |  |
| Racking Type/Description: |  |
| Treatment for Roof  Penetrations: |  |
| **Comments. Please explain why you chose this option:** | |
| **Pitched Roof Racking System for LMI Projects** | |
| Racking Manufacturer: |  |
| Racking Model #: |  |
| Racking Type/Description: |  |
| Treatment for Roof  Penetrations: |  |
| **Comments. Please explain why you chose this option:** | |

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| **PART XI. RESPONDENT’S PROPOSED FINANCING FOR SOLARIZE PHILLY CUSTOMERS: LMI RESIDENTIAL (required)** |
| Select one of the following:  ☐ Respondent does not offer financial products, but still intends to offer installation services. (Skip to section XII, if selected this option)  ☐ Respondent or a third-party partner offers financial products for LMI households. If selected this option, provide information about financing solutions that you intend to offer to Solarize Philly LMI customers including loan, Power Purchase Agreement (PPA), and/or lease options. If not your own financing, please provide a reference and contact information for a representative at the partnered financing company. Please provide three references of your customers who have used this financing before.  If you plan to offer multiple financing options for a single segment, please provide the same information for additional products as an attachment. |

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| 1. **Loan Terms for LMI Projects (attach additional sheets if needed)** | | | | | | | |
|  | **Product**  **Name** | **Term Length (Years)** | **Interest Rate** | **Required Down Payment**  **($ or %)** | **Dealer Financing Fee**  **($ or %)** | **# of customers who have used this financing in the past 12 months** | **Underwriting Criteria** |
| 1 |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |
| **Representative(s) at Financing Company** | | | | | | | |
|  | **Product/**  **Company** | **Name of Representative** | | **Address** | | **Email** | **Telephone** |
| 1 |  |  | |  | |  |  |
| 2 |  |  | |  | |  |  |
| 3 |  |  | |  | |  |  |
| **References for Customers who have used this Financing** | | | | | | | |
|  | **Product used** | **Customer Name** | | **Address** | | **Email** | **Telephone** |
| 1 |  |  | |  | |  |  |
| 2 |  |  | |  | |  |  |
| 3 |  |  | |  | |  |  |
| **Comments on loan terms.** | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1. **PPA Terms for LMI Projects (attach additional sheets if needed)** | | | | | | | | |
|  | **Product**  **Name** | **Term Length** | **Price**  **($/kWh)** | **Escalator (%)** | **Required Down Payment**  **($ or %)** | **Dealer Financing Fee**  **($ or %)** | **# of customers who have used this financing in the past 12 months** | **Underwriting Criteria** |
| 1 |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |
| **Representative(s) at Financing Company** | | | | | | | | |
|  | **Product/**  **Company** | **Name of Representative** | | **Address** | | | **Email** | **Telephone** |
| 1 |  |  | |  | | |  |  |
| 2 |  |  | |  | | |  |  |
| 3 |  |  | |  | | |  |  |
| **References for Customers who have used PPA** | | | | | | | | |
|  | **Product used** | **Customer Name** | | **Address** | | | **Email** | **Telephone** |
| 1 |  |  | |  | | |  |  |
| 2 |  |  | |  | | |  |  |
| 3 |  |  | |  | | |  |  |
| **Comments on PPA terms.** | | | | | | | | |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1. **Lease Terms for LMI Projects (attach additional pages if needed)** | | | | | | | | |
|  | **Product**  **Name** | **Term Length** | **Price**  **($/kWh)** | **Escalator (%)** | **Required Down Payment**  **($ or %)** | **Dealer Financing Fee**  **($ or %)** | **# of customers who have used this financing in the past 12 months** | **Underwriting Criteria** |
| 1 |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |
| **Representative(s) at Financing Company** | | | | | | | | |
|  | **Product/**  **Company** | **Name of Representative** | | **Address** | | | **Email** | **Telephone** |
| 1 |  |  | |  | | |  |  |
| 2 |  |  | |  | | |  |  |
| 3 |  |  | |  | | |  |  |
| **References for Customers who have used Lease** | | | | | | | | |
|  | **Product used** | **Customer Name** | | **Address** | | | **Email** | **Telephone** |
| 1 |  |  | |  | | |  |  |
| 2 |  |  | |  | | |  |  |
| 3 |  |  | |  | | |  |  |
| **Comments on lease terms.** | | | | | | | | |

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| **PART XII. RESPONDENT’S PROPOSED PRICING FOR SOLARIZE PHILLY LMI CUSTOMERS (required)** | |
| Please propose a breakdown of system installation sizes (kW range) and pricing ($/watt). 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. | |
| **Residential LMI Projects** | |
| **1-3 kWDC** | $ /  wattDC |
| **>3-6 kWDC** | $ /  wattDC |
| **>6-10 kWDC** | $ /  wattDC |
| **>10 kWDC** | $ /  wattDC |
| **Solarize Philly Program Fee** | |
| In Phase 4, PEA collected $0.20 per watt for residential projects and $0.05 per watt for commercial projects. PEA did not collect a program fee from the Solar Savings Grant Program projects (serving LMI households). Please provide any comments on the program fee here. | |
| **Proposed System Adders for LMI Projects** | |
| 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** |
|  |  |
|  |  |
|  |  |
| **Comments.** | |
| **Subsidy Requested for LMI Projects** | |
| Please describe the subsidy requested (Loan Loss Reserve, SREC Purchase Contract, or otherwise) requested to support the LMI offering described above. | |
| **CAP Customer Offering** | |
| Will you offer a financing option that can deliver savings for customers on the Customer Assistance Program (CAP)? If so, please describe any differences in the approach for this offering, including the subsidy requested. | |

**PARTS XIII - XVII: COMMERCIAL**

(Required if Respondent is proposing to serve the commercial market segment)

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| **PART XIII. RESPONDENT’S SOLAR PV INSTALLATION EXPERIENCE : COMMERCIAL (Optional)** | | |
| **Commercial Solar PV Installation History (total):** |  |  |
| Number of PV systems installed in 2017:  Number of PV systems installed in 2018: Number of PV systems installed in 2019:  Number of PV systems installed in 2020: | Total capacity of systems installed in 2017:  Total capacity of systems installed in 2018:  Total capacity of systems installed in 2019:  Total capacity of systems installed in 2020: | kWDC  kWDC  kWDC  kWDC |
| **Commercial Solar PV Installation History (Philadelphia only):** | | |
| Number of PV systems installed in 2017:  Number of PV systems installed in 2018:  Number of PV systems installed in 2019:  Number of PV systems installed in 2020: | Total capacity of systems installed in 2017:  Total capacity of systems installed in 2018:  Total capacity of systems installed in 2019  Total capacity of systems installed in 2020 | kWDC  kWDC  kWDC  kWDC |
| Minimum system size you are willing to install: kWDC | | |
| Maximum system size you are willing to install: kWDC | | |

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| --- | --- | --- | --- | --- |
| **PART XIV. REFERENCES: COMMERCIAL (optional)**  Please provide the contact information for three previous commercial customers as references.  All Respondents seeking to serve the commercial segment will be required to submit an additional list of past commercial projects completed in Philadelphia as references with customer contact information that may be randomly evaluated by a third-party inspector for quality assurance. This project list should be attached as Exhibit L. | | | | |
|  | **Name** | **Address** | **Telephone** | **Email** |
| 1. |  |  | - - |  |
| 2. |  |  | - - |  |
| 3. |  |  | - - |  |

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| **PART XV. RESPONDENT’S PROPOSED HARDWARE: COMMERCIAL (required)** | |
| 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 (if your company offers solar PV installs with premium modules). This same list will be used in the Proposed Pricing section (Part XVII below). In the “Comments” sections, please add any important information about when the specific hardware may or may not be appropriate. | |
| **Standard Commercial 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 Commercial 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 Commercial Inverter** | |
| Inverter Manufacturer: |  |
| Inverter Model #: |  |
| Inverter Wattage (AC): |  |
| Current $/watt price to you: |  |
| Country of Origin: |  |
| **Comments. Please explain why you chose this option:** | |
| **Commercial Flat 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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| --- | --- |
| **Commercial Ground Mount System** | |
| Racking Manufacturer: |  |
| Racking Model #: |  |
| Racking Type/Description: |  |
| Treatment for Roof  Penetrations: |  |
| **Comments. Please explain why you chose this option:** | |
| **Commercial Pitched Roof Racking System** | |
| Racking Manufacturer: |  |
| Racking Model #: |  |
| Racking Type/Description: |  |
| Treatment for Roof  Penetrations: |  |
| **Comments. Please explain why you chose this option:** | |
| **Commercial Solar Canopy/ Pergola** | |
| Model and manufacturer: |  |
| Module type: |  |
| Racking Type/Description: |  |
| Treatment for Roof  Penetrations: |  |
| **Comments. Please explain why you chose this option:** | |
| **Solar Battery Storage (Optional - complete this section if you company offers storage options)** | |
| Energy Storage Product Used: |  |
| Total Energy: |  |
| Usable Energy: |  |
| Voltage Range (Charge): |  |
| Voltage Range (Discharge): |  |
| Absolute Max. Voltage: |  |
| Max Charge/Discharge Current: |  |
| Max Charge/Discharge Power: |  |
| Peak Power (Only Discharging): |  |
| Peak Current (Only Discharging): |  |
| Protection Feature: |  |
| Price per kWh (all inclusive): |  |
| **Comments. Please explain why you chose this option:** | |

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| **PART XVI. RESPONDENT’S PROPOSED FINANCING FOR SOLARIZE PHILLY CUSTOMERS: COMMERCIAL** |
| Select one of the following:  ☐ Respondent does not offer financial products for commercial projects, but still intends to offer installation services. (Skip to Section XVII, if selected this option)  ☐ Respondent or a third-party partner offers financial products. If selected this option, provide information about financing solutions that you intend to offer to Solarize Philly commercial customers including loan, Power Purchase Agreement (PPA), and/or lease options. If not your own financing, please provide a reference and contact information for a representative at the partnered financing company. Please provide three references of your customers who have used this financing before.  If you plan to offer multiple financing options for a single segment, please provide the same information for additional products as an attachment. |

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| 1. **Loan Terms for Commercial Projects (attached additional sheets if needed)** | | | | | | | |
|  | **Product**  **Name** | **Term Length (Years)** | **Interest Rate** | **Required Down Payment**  **($ or %)** | **Dealer Financing Fee**  **($ or %)** | **# of customers who have used this financing in the past 12 months** | **Underwriting Criteria** |
| 1 |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |
| **Representative(s) at Financing Company** | | | | | | | |
|  | **Product/**  **Company** | **Name of Representative** | | **Address** | | **Email** | **Telephone** |
| 1 |  |  | |  | |  | |
| 2 |  |  | |  | |  |  |
| 3 |  |  | |  | |  |  |
| **References for Customers who have used this Financing** | | | | | | | |
|  | **Product used** | **Customer Name** | | **Address** | | **Email** | **Telephone** |
| 1 |  |  | |  | |  |  |
| 2 |  |  | |  | |  |  |
| 3 |  |  | |  | |  |  |
| **Comments on loan terms.** | | | | | | | |

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| 1. **PPA Terms for Commercial Projects (attached additional sheets if needed)** | | | | | | | | |
|  | **Product**  **Name** | **Term Length** | **Price**  **($/kWh)** | **Escalator (%)** | **Required Down Payment**  **($ or %)** | **Dealer Financing Fee**  **($ or %)** | **# of customers who have used this financing in the past 12 months** | **Underwriting Criteria** |
| 1 |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |
| **Representative(s) at Financing Company** | | | | | | | | |
|  | **Product/**  **Company** | **Name of Representative** | | **Address** | | | **Email** | **Telephone** |
| 1 |  |  | |  | | |  |  |
| 2 |  |  | |  | | |  |  |
| 3 |  |  | |  | | |  |  |
| **References for Customers who have used PPA** | | | | | | | | |
|  | **Product used** | **Customer Name** | | **Address** | | | **Email** | **Telephone** |
| 1 |  |  | |  | | |  |  |
| 2 |  |  | |  | | |  |  |
| 3 |  |  | |  | | |  |  |
| **Comments on PPA terms.** | | | | | | | | |

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| 1. **Lease Terms for Commercial Projects (attached additional sheets if needed)** | | | | | | | | |
|  | **Product**  **Name** | **Term Length** | **Price**  **($/kWh)** | **Escalator (%)** | **Required Down Payment**  **($ or %)** | **Dealer Financing Fee**  **($ or %)** | **# of customers who have used this financing in the past 12 months** | **Underwriting Criteria** |
| 1 |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |
| **Representative(s) at Financing Company** | | | | | | | | |
|  | **Product/**  **Company** | **Name of Representative** | | **Address** | | | **Email** | **Telephone** |
| 1 |  |  | |  | | |  |  |
| 2 |  |  | |  | | |  |  |
| 3 |  |  | |  | | |  |  |
| **References for Customers who have used Lease** | | | | | | | | |
|  | **Product used** | **Customer Name** | | **Address** | | | **Email** | **Telephone** |
| 1 |  |  | |  | | |  |  |
| 2 |  |  | |  | | |  |  |
| 3 |  |  | |  | | |  |  |
| **Comments on lease terms.** | | | | | | | | |

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| **PART XVII. RESPONDENT’S PROPOSED PRICING FOR SOLARIZE PHILLY COMMERCIAL CUSTOMERS (required)** | |
| Please propose a breakdown of system installation sizes (kW range) and pricing ($/watt). 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.  Respondents should provide pricing excluding PEA’s program fees, and PEA will evaluate the customer-facing pricing as the submitted price plus the planned program fee. The program fees for new Phase will be finalized upon completion of this procurement process. | |
| **Commercial Projects** | |
| **10-50 kWDC** | $ /  wattDC |
| **51-150 kWDC** | $ /  wattDC |
| **151-300 kWDC** | $ /  wattDC |
| **300+ kWDC** | $ /  wattDC |
| **Solarize Philly Program Fee** | |
| In Phase 4, PEA collected $0.20 per watt for residential projects and $0.05 per watt for commercial projects. PEA did not collect a program fee from SSGP projects. PEA is considering offering a reduced program fee for leads generated by Contractor. Please provide any comments on the program fee here. | |
| **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.** | |

**PARTS XVIII - XXII**

**(Required for all Respondents. Residential, LMI Residential, and Commercial)**

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| **PART XVIII. ADDITIONAL PROGRAM INPUT (Required for all Respondents)** |
| Provide information on any other requirements you have about system installations. |
| 1. Are there any roof types that you will not work with? |
| 2. What associated electrical work are you willing to do for a customer? |
| 3. If you notice significant opportunities to improve your customer’s energy efficiency, what do you do? |
| 4. Describe the workmanship warranty agreement that will be offered to customers. PEA requires a minimum workmanship warranty of five years. |
| 5. Describe your company’s approach to addressing routine and/or corrective maintenance, system monitoring and communications protocols, as well as associated customer costs for each (this may also be included as an attachment): |
| 6. Elaborate on your current lead generation and customer intake processes: |
| 7. Elaborate on your current process for performing site assessments, system designs, and customer proposals: |
| 8. Elaborate on your current sales process: |
| 9. Names of the financial management and customer relationships management (CRM) softwares that you use: |
| 10. Describe your company’s policies and procedures for ensuring safety for the workers on site and for the customers who are present at the worksite. Include workplace and on-site safety practices for COVID-19. |

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| **PART XIX. SOLARIZE PHILLY MARKETING AND RECRUITMENT OF LEADS (Residential & LMI Only)** |
| 1. Describe your plan for marketing Solarize Philly and recruiting leads into the program. 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 or resources that will be allocated to complement and support Solarize Philly’s efforts or to produce these marketing materials. Identify any potential community partners that might assist in deploying or enhancing the marketing strategy. |
| 1. Proposed Referral Incentives 2. Describe any existing referral incentives your company offers. 3. Describe any proposed referral incentives that you would offer to Solarize Philly customers. These could include discounts based on the total number of contracts, referral fees, or otherwise. |

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| **PART XX. CAPACITY FOR SOLAR INSTALLATIONS (Required for all Respondents)** | |
| 1. Describe your ability to handle a large number of leads and projects over a short timeframe. (For reference, PEA referred nearly 650 residential leads to a single Contractor during a prior Enrollment Period): | |
| 2. Number of site assessments you are capable of completing per week: | |
| 3. Number of sales visits (whether in person or virtual due to COVID-19 precautions) you are capable of completing per week: | |
| 4. Average number of days from contract signing to Permission to Operate (PTO) for projects completed in Philadelphia:  (If you haven’t completed many projects in Philadelphia, please provide data from another market) | |
| 5. 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: | |
| 6. Describe a contingency plan if Solarize Philly workload exceeds your expectations and staff capacity: | |
| 7. Maximum Total desired workload for Solarize Philly over next 18 months: # of Systems: kWDC: | |

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| **PART XXI. SIGNATURE (Required for all Respondents)** |
| The undersigned hereby certifies:   1. That he or she has the legal authority to sign this application on behalf of the Respondent. 2. That the Respondent 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 Respondent have been duly paid (except as provided under Section 3.5). 4. That the information contained in this Respondent and the attached Exhibits is complete, true and correct. 5. That the financial statements that accompany this Respondent as an Exhibit fairly represent the financial condition of the Respondent when written. Since the date of the most recent financial statements, there has been no material adverse change in the Respondent’s financial condition. 6. That the Respondent agrees to notify the Philadelphia Energy Authority promptly of any material changes to the Respondent and the attached Exhibits. 7. That the Respondent 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 Respondent authorizes any individual, including the Respondent'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 Respondent, 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 Respondent or any of its agents, representatives, owners, employees, or parties in interest. 9. The Respondent understands and acknowledges that, until a final selection is made under the RFP, PEA may enter into discussions with the Respondent to negotiate the terms of its proposal in an effort to reach the most favorable arrangement for Solarize Philly’s customers. 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 Respondent represents and warrants that, if it is pre-approved under this RFP, it will comply with the terms of the RFP and will perform all of the duties and obligations of a pre-approved Contractor in the Solarize Philly program.  **Respondent/ Company**:  By: Name:  Title:  Date: |
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| **PART XXII. 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) |
| **Exhibit B:** | Spec sheets for all hardware listed in the Response Form. |
| **Exhibit C:** | Contractor’s audited financial reports for the three most recent fiscal years. If audited statements are not available, include the business’s federal tax returns for the three most recent years. |
| **Exhibit D:** | Current certificate of insurance (COI) |
| **Exhibit E:** | Respondent’s Diverse Business and Local Hiring Plan. Though not required, Respondent is invited to explain your strategy for creating a robust diverse local solar workforce, which could include the Respondent’s ability to commit to actions such as but not limited to the following:   1. Recruit Respondents 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 customer with no visible customer information. |
| **Exhibit G:** | A redacted version of a Power Purchase Agreement you presented to a recent residential/commercial 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/commercial 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 /commercial customer (if you offer a Loan, either through your company or a partner). |
| **Exhibit J:** | Contract with the Requested Revisions |
| **Exhibit K:** | Contractor’s COVID-19 Safety Plan, in line with the [**guidelines**](https://www.phila.gov/programs/coronavirus-disease-2019-covid-19/guidance/guidance-documents/#/documents) provided by the City. Selected Contractors will be asked to submit Workplace Training Certificates for each of Contractor’s Pandemic Safety Officers prior to the start of Solarize Philly work. |
| **Exhibit L:** | A list of 10-20 past residential projects completed in Philadelphia as references with customer contact information that may be randomly evaluated by a third-party inspector for quality assurance. |
| **Exhibit M:** | City of Philadelphia Tax Clearance Certificate (the certificate can be obtained[**here**](https://www.phila.gov/services/payments-assistance-taxes/get-tax-clearance/)). |

**Filing Deadline:** The completed Solarize *Philly Contractor Response Form* and the Exhibits must be delivered to the Philadelphia Energy Authority no later than **5pm on Friday, May 14, 2021.**

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