

Appendix A: Solarize Philly Contractor Response Form

RESPONDENT BACKGROUND INFORMATION

PART I. RESPONDENT'S POINT OF CONTACT		
Name:	Title:	
Telephone: - -	Cell Phone: - -	Email:

PART II. RESPONDENT INFORMATION			
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): <input type="checkbox"/> For-Profit Corporation <input type="checkbox"/> Non-Profit Corporation <input type="checkbox"/> Limited Partnership <input type="checkbox"/> General Partnership <input type="checkbox"/> Limited Liability Company <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> 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 Sales Representatives:	
# of Employees with PA Electrician license:		# 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."			

Official designation from the City of Philadelphia for minority, woman, or disabled-owned status:

- DSBE: Disabled Owned Business
- LBE: Philadelphia Local Business Entity
- WBE: Women Business Enterprise
- DBE: Disadvantaged Business Enterprise
- MBE: Minority Business Enterprise

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

Subsidiaries/Affiliates: List subsidiaries and affiliates. Use a separate sheet if necessary.

Business Name	Business Address	FEIN Number

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:

PART III. ORGANIZATIONAL OPERATIONS

1. Provide information on any other requirements you have about system installations.
2. Are there any roof types that you will not work with? Note that flat roofs are common in Philadelphia.
3. What associated electrical work are you willing to do for a customer?
4. If you notice significant opportunities to improve your customer's energy efficiency, what do you do?
5. Describe the workmanship warranty agreement that will be offered to customers. PEA requires a minimum workmanship warranty of ten years.
6. 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):
7. Describe your process for performing site assessments, system designs, and delivering customer proposals:
8. Describe your sales process:
9. State what customer relationships management (CRM) software you use. Describe your reporting process and how you anticipate providing updates to PEA's Salesforce.

10. [Optional] Per section 2.6.8 of the RFP, if you anticipate that your reporting process won't match with PEA's requirements, describe your proposed reporting solution.

11. 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:

PART IV. SOLARIZE PHILLY MARKETING AND RECRUITMENT OF LEADS

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 (e.g. lawn signs, flyers, direct mail, 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. Suggest any creative marketing ideas to undertake with PEA.

2. Describe any proposed referral incentives you will offer to Solarize Philly customers.

PART V. CAPACITY FOR SOLAR INSTALLATIONS

1. Describe your ability to handle a large number of leads and projects over a short timeframe. (For reference, PEA referred nearly 700 residential leads to a single Contractor during a previous two-year period of the program):

2. Number of site assessments you are capable of completing per week:

3. Number of sales visits (whether in person or virtual) 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. If selected as a Solarize Philly Contractor, do you anticipate growing your capacity? What do you anticipate is your likely capacity in Philadelphia and will that require growing your existing staff?

6. Describe a contingency plan if Solarize Philly workload exceeds your expectations and staff capacity:

PART VI. MARKETS SERVED BY THE RESPONDENT

Indicate the Solarize Philly market segment(s) the Contractor proposes to serve. Select all that apply.

- Market-rate (MR) residential (complete Parts VII - IX and XIII - XIV)
- Low-and moderate-income (LMI) residential (complete Parts X - XIV)
- Commercial (complete Parts XV - XIX)
- Standalone financial provider (complete only Parts XX)

MARKET-RATE RESIDENTIAL

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

PART VII. RESPONDENT’S SOLAR PV INSTALLATION EXPERIENCE: MR RESIDENTIAL		
Residential Solar PV Installation History (total):		
Number of PV systems installed in 2019:	Total capacity of systems installed in 2019:	kW _{DC}
Number of PV systems installed in 2020:	Total capacity of systems installed in 2020:	kW _{DC}
Number of PV systems installed in 2021:	Total capacity of systems installed in 2021:	kW _{DC}
Number of PV systems installed in 2022:	Total capacity of systems installed in 2022:	kW _{DC}
Residential Solar PV Installation History (Philadelphia only):		
Number of PV systems installed in 2019:	Total capacity of systems installed in 2019:	kW _{DC}
Number of PV systems installed in 2020:	Total capacity of systems installed in 2020:	kW _{DC}
Number of PV systems installed in 2021:	Total capacity of systems installed in 2021:	kW _{DC}
Number of PV systems installed in 2022:	Total capacity of systems installed in 2022:	kW _{DC}
Average system size of all projects installed in 2019-2022:	kW _{DC}	
Median system size of all projects installed in 2019-2022:	kW _{DC}	
Minimum system size you are willing to install:	kW _{DC}	
Maximum system size you are willing to install:	kW _{DC}	

PART VIII. RESPONDENT’S PROPOSED PRICING FOR SOLARIZE PHILLY MR RESIDENTIAL CUSTOMERS	
<p>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.</p> <p>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 this contract term will be finalized during PEA’s review of the RFP responses.</p> <p>If you are offering PPA or lease options, provide details in Sections XIV below.</p>	
System Pricing	
> 3 kW_{DC}	\$ /W _{DC}
3-6 kW_{DC}	\$ /W _{DC}
>6-10 kW_{DC}	\$ /W _{DC}
>10 kW_{DC}	\$ /W _{DC}

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.

Solarize Philly Program Fee

In 2021-2023, PEA collected \$0.10 per watt for residential projects. PEA is considering offering a reduced program fee if a Contractor is a [Philadelphia Certified Local Business Entity](#). Please provide any comments on the program fee here.

PART IX. REFERENCES: MR RESIDENTIAL

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.			- -	

LMI RESIDENTIAL

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

PART X. RESPONDENT’S SOLAR PV INSTALLATION EXPERIENCE THROUGH PROGRAMS THAT SERVED THE LMI MARKET		
LMI Residential Solar PV Installation History (total):		
Number of PV systems installed in 2019:	Total capacity of systems installed in 2019:	kW _{DC}
Number of PV systems installed in 2020:	Total capacity of systems installed in 2020:	kW _{DC}
Number of PV systems installed in 2021:	Total capacity of systems installed in 2021:	kW _{DC}
Number of PV systems installed in 2022:	Total capacity of systems installed in 2022:	kW _{DC}
Comments.		
LMI Residential Solar PV Installation History (Philadelphia only):		
Number of PV systems installed in 2019:	Total capacity of systems installed in 2019:	kW _{DC}
Number of PV systems installed in 2020:	Total capacity of systems installed in 2020:	kW _{DC}
Number of PV systems installed in 2021:	Total capacity of systems installed in 2021:	kW _{DC}
Number of PV systems installed in 2022:	Total capacity of systems installed in 2022:	kW _{DC}
Comments.		
Average system size of all projects installed in 2019-2022:	kW _{DC}	
Median system size of all projects installed in 2019-2022:	kW _{DC}	
Minimum system size you are willing to install:	kW _{DC}	
Maximum system size you are willing to install:	kW _{DC}	

PART XI. RESPONDENT’S PROPOSED PRICING FOR SOLARIZE PHILLY LMI CUSTOMERS (if different than MR Residential)
<p>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.</p> <p><input type="checkbox"/> If you are offering PPA or lease options, provide details in Sections XIV below.</p> <p><input type="checkbox"/> Proposed LMI residential pricing will be the same as MR residential pricing. (Skip pricing below)</p>
System Pricing

1-3 kW _{DC}	\$ /W _{DC}
>3-6 kW _{DC}	\$ /W _{DC}
>6-10 kW _{DC}	\$ /W _{DC}
>10 kW _{DC}	\$ /W _{DC}

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.

Solarize Philly Program Fee

PEA does not collect a fee for LMI customers, which are located in HUD Qualified Census Tracts or have verified income below 80% AMI. Please provide any comments on the program fee here.

Subsidy Requested for LMI Projects

Please describe the subsidy (e.g. Loan Loss Reserve, SREC Purchase Contract, etc.) requested to support the LMI offering described above.

PART XII. REFERENCES: LMI RESIDENTIAL

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.			- -	

MR and LMI RESIDENTIAL EQUIPMENT & FINANCING

(Required if Respondent is proposing to serve MR or LMI residential market segments)

PART XIII. RESPONDENT'S PROPOSED HARDWARE: MR & LMI RESIDENTIAL	
<p>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.</p>	
Standard Residential PV Module	
Module Manufacturer:	
Module Rated Wattage (STC):	
Current \$/watt price to you:	
Country of Origin:	
<p>Comments. Please explain why you chose this option:</p>	
Premium Residential PV Module	
Module Manufacturer:	
Module Rated Wattage (STC):	
Current \$/watt price to you:	
Country of Origin:	
<p>Comments. Please explain why you chose this option:</p>	
Are you certified to install any specific brand of modules (e.g. SunPower)?	
<p>Please list and describe:</p>	
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:	
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):	
Current \$/watt price to you:	
Comments. Please explain why you chose this option:	
Additional energy-related products offered (such as EV chargers) (Optional)	
Provide detail on additional services offered.	

PART XIV. RESPONDENT’S PROPOSED FINANCING FOR SOLARIZE PHILLY CUSTOMERS: MR & LMI RESIDENTIAL

Select one the following:

Respondent does not offer financial products, but still intends to offer installation services. (Skip this section)

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.

A. 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.

A. 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:

Minimum project size required for financing:
Contact for Representative(s) at Financing Company:

References for Customers who have used PPA

	Customer Name	Address	Email	Telephone
1				
2				
3				

Comments on PPA terms.

B. 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:

Contact for Representative(s) at Financing Company:

References for Customers who have used Lease

	Customer Name	Address	Email	Telephone
1				
2				
3				

Comments on lease terms.

COMMERCIAL

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

PART XV. RESPONDENT'S SOLAR PV INSTALLATION EXPERIENCE: COMMERCIAL		
Commercial Solar PV Installation History (total):		
Number of PV systems installed in 2019:	Total capacity of systems installed in 2019:	kW _{DC}
Number of PV systems installed in 2020:	Total capacity of systems installed in 2020:	kW _{DC}
Number of PV systems installed in 2021:	Total capacity of systems installed in 2021:	kW _{DC}
Number of PV systems installed in 2022:	Total capacity of systems installed in 2022:	kW _{DC}
Commercial Solar PV Installation History (Philadelphia only):		
Number of PV systems installed in 2019:	Total capacity of systems installed in 2019:	kW _{DC}
Number of PV systems installed in 2020:	Total capacity of systems installed in 2020:	kW _{DC}
Number of PV systems installed in 2021:	Total capacity of systems installed in 2021:	kW _{DC}
Number of PV systems installed in 2022:	Total capacity of systems installed in 2022:	kW _{DC}
Average system size of all projects installed in 2019-2022:	kW _{DC}	
Median system size of all projects installed in 2019-2022:	kW _{DC}	
Minimum system size you are willing to install:	kW _{DC}	
Maximum system size you are willing to install:	kW _{DC}	

PART XVI. RESPONDENT'S PROPOSED PRICING FOR SOLARIZE PHILLY COMMERCIAL CUSTOMERS	
<p>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.</p> <p>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 this contract term will be finalized upon completion of this procurement process.</p>	
System Pricing	
< 100 kW_{DC}	\$ /W _{DC}
100-499 kW_{DC}	\$ /W _{DC}
500-999 kW_{DC}	\$ /W _{DC}
> 1 MW_{DC}	\$ /W _{DC}
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.	
Solarize Philly Program Fee	
<p>In 2021-2022, PEA collected a program fee of \$0.05 per watt for commercial projects. PEA is considering offering a reduced program fee for leads generated by Contractor or if a Contractor is a Philadelphia Certified Local Business Entity. Please provide any comments on the program fee here.</p>	

PART XVII. REFERENCES: COMMERCIAL

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.			- -	

PART XVIII. RESPONDENT’S PROPOSED HARDWARE: COMMERCIAL

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:

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:	

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 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 XIX. 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.

A. 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.

C. 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:

Minimum project size required for financing:
Contact for Representative(s) at Financing Company

References for Customers who have used PPA

	Customer Name	Address	Email	Telephone
1.				
2.				
3.				

Comments on PPA terms.

D. 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:

Contact for Representative(s) at Financing Company:

References for Customers who have used Lease

	Customer Name	Address	Email	Telephone
1.				
2.				
3.				

Comments on lease terms.

STANDALONE FINANCIAL PRODUCTS

(Required for Respondents that offer standalone financial products that may be made available to third party solar companies to offer to their customers)

PART XX. FINANCIAL PRODUCTS

1. How have you worked with solar companies in the past to implement financing options for their customers?
2. Describe your company and the services you offer, typical rates, markets you engage with (market-rate residential, LMI residential, commercial, etc.), project sizes you work with, etc.
3. Propose a financing method that would support Solarize Philly projects model - how would you engage with market-rate residential, LMI residential, and/or commercial customers? Please state whether this is a model you have implemented with similar financing methods in other markets and if so, describe the program in detail.
4. Describe how your model would reach customers who may not traditionally have access to finance new technologies or clean energy products (i.e., low FICO score customers). Further describe any additional support you would seek from PEA and/or PGCC to expand program access to this population (i.e., credit enhancements).
5. Describe any financing you would expect to provide, including what kinds of financing options would be available and why your financing costs are competitive or, alternatively what sort of financing support you would need.

6. Provide any additional comments.

PART XXI. SIGNATURE (Required for all Respondents)

1. The undersigned hereby certifies:
2. That he or she has the legal authority to sign this application on behalf of the Respondent.
3. That the Respondent is duly organized and in good standing under the laws of the jurisdiction in which it is organized.
4. 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).
5. That the information contained in this Respondent and the attached Exhibits is complete, true and correct.
6. 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.
7. That the Respondent agrees to notify the Philadelphia Energy Authority promptly of any material changes to the Respondent and the attached Exhibits.
8. 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.
9. 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.
10. 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.
11. 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:

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 and 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:	<p>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:</p> <ol style="list-style-type: none">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.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:	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 L:	City of Philadelphia Tax and Regulatory Status and Clearance Statement and a Tax Compliance Certificate from the City of Philadelphia (the certificate can be obtained here).

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, October 13, 2023**.

Submit your completed form and the required Exhibits by email to solarize@philaenergy.org