



REQUEST FOR PROPOSALS

For Inspection Services for Solar Installation, Battery Storage Installation, Home Repair, and Energy Efficiency

for

Philadelphia Green Capital Corp & Philadelphia Energy Authority Programs

Released: April 17, 2025

Response Deadline: May 19, 2025 5:00pm EST

[The deadline for submissions for Scope 1: Solar Inspection Services has been extended to Friday, June 6th.](#)

Jointly issued by:

THE PHILADELPHIA GREEN CAPITAL CORP. (PGCC)

and

THE PHILADELPHIA ENERGY AUTHORITY (PEA)

Table of Contents

1. Purpose	3
1.1. Scope Option 1: Solar (Scope 1)	3
1.2. Scope Option 2: Home Inspections (Scope 2)	3
2. Background	4
2.1. About the Philadelphia Energy Authority	4
2.2. About the Philadelphia Green Capital Corp.	4
2.3. About Solarize Philly	4
2.4. About Solar Savings Grant Program	5
2.5. About Built to Last	5
2.6. Potential Additional Solar Programs	5
3. Scope of Work Options	6
3.1. Scope Option 1: Solar & Battery QAA Inspections (Residential and Commercial), Coordination of Installer Repairs, and Enabling Upgrade Inspections	6
3.1.1. Ability to inspect all housing and roof types in Southeast PA	6
3.1.2. Additional Process Details for Scope 1	7
3.1.3. QAA Inspection Requirements	8
3.2. Scope Option 2: Home Inspections: Energy Efficiency and General Construction	9
3.2.1. Energy Audits and Quality Control Inspections	9
3.2.2. General Whole-Home Inspections	9
4. Questions, Proposal Format, and Submission	10
4.1. Anticipated Procurement Timeline	10
4.2. Questions	10
4.3. Proposal Deadline	10
4.4. Notice to State Requested Exceptions to Contract Terms and Conditions	10
4.5. The Philadelphia Tax Clearance Statement	11
4.6. Good Faith Efforts	12
4.7. Format for Proposals	12
5. Public Disclosure and Confidential Information	14
6. Minimum Eligibility Thresholds	14
7. Evaluation Criteria	14
8. The Program Team's Additional Procurement Rights	15
9. Costs	16
10. Indemnification	16
Attachment 1 – Byrd Anti-Lobbying Certification	17

1. Purpose

The Philadelphia Green Capital Corp. (PGCC) and Philadelphia Energy Authority (PEA) (The Program Team) have issued this Request for Proposals (RFP) to solicit proposals from service providers, or Quality Assurance Assessment (QAA) firms (Contractors), that offer a combination of solar photovoltaic (PV) and battery storage QAA inspection services, as well as repair coordination services to ensure any issues found in the inspection are corrected. Additionally, this RFP is to solicit proposals from service providers that offer home repair and energy efficiency inspection services.

To solicit responses from firms able to complete one or a combination of services, there are two scope options in this RFP. In the first option, Contractors will inspect installations completed as a part of solar programs managed by the Program Team. In the second option, Contractors will conduct general, whole-home and/or energy efficiency inspections for Built to Last, the City of Philadelphia's Whole Home Repairs program. Contractors may choose to apply to either or both scopes.

The Program Team is seeking qualified Contractors to deliver cost-competitive inspections for the following types of projects:

1.1. Scope Option 1: Solar (Scope 1)

- a. **Residential solar quality assurance inspections for systems** installed on single-family residences or multi-family residential structures of no more than four units, including roof and ground-mounted systems.
- b. **Commercial solar quality assurance inspections for systems** installed on any other property that does not fall into the description of "residential", including roof and ground-mounted systems - this includes multifamily properties with more than four units, commercial buildings, and mixed-use residential and commercial buildings.
- c. **Battery storage quality assurance inspections** in conjunction with either residential or commercial solar systems addressed above.
- d. **Quality assurance inspections of solar-enabling repairs.** Solar-enabling repair (Enabling Upgrades) includes roof repair and electrical service upgrades that enable residential solar and battery installations.
- e. **Installer Repair Management**

1.2. Scope Option 2: Home Inspections (Scope 2)

- a. **Energy Audits and Energy Efficiency Quality Control Inspections (QCI)** for weatherization and energy efficiency upgrades.
- b. **General Whole Home Inspections** for repair of and improvements to building structure, major systems, health and safety.

Scope 1 Projects will primarily be located in Philadelphia County and, contingent upon funding availability, may expand to Bucks, Chester, Delaware, and Montgomery Counties ("Southeast PA"). Scope 2 projects will be located exclusively in Philadelphia County.

The Program Team expects to select Contractors with this RFP for an initial contract term from Q2 2025 through December 2026, with the option to renew the Contract in one-year increments up to 3 times, with the final renewal terminating December 2029 (if all renewal options are exercised). The Program Team may expand the scope of work under the Contract to incorporate any future solar installation

programs that they operate during the term (including extensions, as applicable) and/or may elect to provide multiple contracts under this RFP to the selected bidder(s) to cover additional programs and/or funding source(s) separately. Selected Contractor(s) will enter into a Contract for Services with PEA or PGCC relating to the scope or scopes for which they are selected. See Appendix B: PEA/PGCC Contract for Services.

2. Background

2.1. About the Philadelphia Energy Authority

PEA is an independent municipal authority established in 2010 focused on issues of energy affordability and sustainability for Philadelphia's government and its citizens. In 2016, PEA launched the Philadelphia Energy Campaign, a \$1 billion, 10-year investment in energy efficiency and clean energy projects to create 10,000 jobs. Since 2016, PEA has supported over \$1 billion of projects and created over 8,000 jobs. PEA's goal is to make Philadelphia a national model for implementing energy strategies that improve the health and well-being of the community and local economy, including the City's most vulnerable residents. PEA administers Philadelphia's Solarize Philly program, Commercial Property-Assessed Clean Energy (C-PACE) program, the Built to Last low-income whole-home repair program, and a set of clean energy workforce training programs.

PEA was formed by the City of Philadelphia under the Pennsylvania Municipality Authorities Act, 53 Pa.C.S. ("the Act") for the purposes described in its Charter as follows:

The Authority's purposes and responsibilities shall be limited to actions for and concerning (i) the development, facilitation and/or financing of energy storage and/or generation projects, (ii) the development, facilitation and/or financing of energy efficiency projects, and (iii) the purchase or facilitation of energy supply and energy services on behalf of the City of Philadelphia, government agencies, institutions and businesses, as well as the education of consumers regarding choices available in the marketplace, and (iv) the promotion of a vital clean energy sector of the Philadelphia economy and increased employment in the sector by undertaking efforts to strengthen the markets for energy efficiency and energy storage and generation projects. The Authority shall have and may exercise all of the powers set forth in the Act that are necessary or convenient for carrying out its purposes and responsibilities.

2.2. About the Philadelphia Green Capital Corp.

PGCC is a Pennsylvania nonprofit corporation that is qualified as a 501(c)(3) charitable organization to make and facilitate grants and program-related investments for environmental action. PGCC is an affiliate of PEA. As a green bank in Southeast Pennsylvania, PGCC's mission is to connect projects to capital to drive a robust, equitable, clean energy market in the region, support PEA, and respond to the local challenges of climate change. PGCC uses proven green bank tools to unlock capital for clean energy projects, to scale and amplify PEA's current work, and to bring new financial products to the Southeastern Pennsylvania region's clean energy economy.

2.3. About Solarize Philly

PEA launched Solarize Philly in April 2017 with the goal of establishing a scalable and replicable model to bring solar to underserved communities. Since then, the program has evolved into a platform for

connecting property owners to approved solar companies to grow consumer trust and accelerate market growth. In addition, Solarize Philly pairs with well-established workforce development programs to train the next generation of skilled solar workers needed to meet growing market demand.

To date, over 3,900 homes (including approximately 2,000 low- and moderate-income (LMI) households) have gone solar, resulting in 22.52 MW of installed rooftop solar capacity. PGCC partners with PEA on the Solarize Philly program by providing financial subsidies for LMI households in the program.

2.4. About Solar Savings Grant Program

In 2020 and 2021, Solarize Philly operated a Solar Savings Grant Program (SSGP) that enabled 50 LMI households to go solar through a combination of a subsidy and a low-cost loan which had no upfront cost to the homeowners and allowed them to start saving in Year 1. PEA continues an ongoing inspection and maintenance program for those 50 homes.

2.5. About Built to Last

The Built to Last Program (BTL) operated by PEA and PGCC seeks to improve the condition of an aging housing stock throughout Philadelphia. BTL serves single-family owner-occupied homes where the occupant households earn 60% of area median income and below. The focus of the repairs includes:

- a. Habitability - to reduce risks of fire, structural failure, water damage, and excessive heat and cold exposure.
- b. Health - to reduce risks associated with trip and fall hazards, mold, lead, and other environmental hazards.
- c. Accessibility - to help people with mobility challenges live with safety and dignity.
- d. Energy Efficiency - to improve affordability, resilience and reduce carbon emissions.

2.6. Potential Additional Solar Programs

Residential solar inspection Contractor(s) will start by working on Solarize Philly and SSGP projects, which are all located within Philadelphia County. PEA and PGCC expect to expand the Solarize program to the rest of Southeast PA (Bucks, Chester, Delaware, and Montgomery Counties) later in 2025 with the Solarize Greater Philadelphia (SGP) program. SGP will support LMI solar adoption with funding provided by the Solar for All (SFA) program from the Environmental Protection Agency (EPA). PGCC is a subrecipient of the Pennsylvania Energy Development Authority's (PEDA) SFA program, which will allow PGCC to use new financial subsidies to dramatically expand the adoption of solar in low-income and disadvantaged communities. However, SFA funding is currently restricted pending legislative action by the Pennsylvania General Assembly to authorize the disbursement of the funds. Additionally, SFA funds may or may not be affected by actions of the current federal administration. Despite this uncertainty, the Program Team encourages Contractors to respond to this RFP under the assumption they will work in all five counties of Southeast PA.

To the extent that PGCC is able to use SFA funding for solar installations and related inspections, the SFA grant imposes flow-down requirements to all contractors, with standard terms and conditions included in Appendix B: PEA/PGCC Contract for Services Exhibit C.

Restrictions on SFA funding do not prevent PEA or PGCC from paying for inspections under this contract using other sources of funding.

3. Scope of Work Options

3.1. Scope Option 1: Solar & Battery QAA Inspections (Residential and Commercial), Coordination of Installer Repairs, and Enabling Upgrade Inspections

The Program Team seeks Contractors who will be able to conduct QAA inspections and coordinate with installers to correct deficiencies for up to 200 residential solar projects per year under the Solarize Philly program and its potential expansion into the Solarize Greater Philadelphia program, up to 50 residential solar projects every other year under SSGP, and 50-150 residential solar homes per year under the SFA program (contingent upon funding availability). An estimated 10-50 of these systems each year will also require battery storage inspections. The Program Team may need to occasionally inspect larger commercial projects. These projects will be shared with Contractor on an as-needed basis, and Contractor will be asked to quote a price based on the specific property. The Program Team will not guarantee a minimum amount of work to Contractor. After completing the QAA inspection, Contractor will provide the finished report to the Program Team.

For certain projects (to be determined by the Program Team), Contractor will also share the results with the installer and ensure any issues are corrected. This requires Contractor to highlight any critical failures, contact the installer, set a reasonable timeline for the Installer to correct failures/deficiencies, and confirm the Installer made the correction by reviewing pictures submitted to them by the Installer. The Program Team does not plan for Contractor to conduct second inspections, unless absolutely necessary. Contractor's report should also document non-critical failures, and on a case-by-case basis, the Program Team may request that these non-critical findings be included in Contractor's communication and remediation plan with the installer. Contractor will provide a high-level summary of the inspection and corrections to the Program Team. This service is referred to as "Installer Repair Management" in the pricing request form.

For certain projects under the SFA program, Contractor will also conduct QAA inspections of completed enabling upgrades, including solar-enabling roof repairs and electrical upgrades. Enabling upgrades are defined as investments in energy and building infrastructure that are necessary to deploy or maximize the benefits of a residential rooftop solar project. Candidates must be able to demonstrate a deep understanding of residential construction best practices as well as familiarity with relevant local and international building codes. PGCC anticipates up to 40% of SFA solar inspections will be paired with enabling upgrades inspections. The Program Team will not guarantee a minimum amount of work to Contractor. After completing the Enabling Upgrades QAA inspection, Contractor will provide the finished report to the Program Team and provide "installer repair management" (as defined in the paragraph above) when requested by the Program Team, coordinating directly with installers to manage corrections.

3.1.1. Ability to inspect all housing and roof types in Southeast PA

Contractor should be able to conduct QAA inspections on all types of housing and commercial buildings found in the five-county region of Philadelphia. For residential inspections, Contractor must provide separate pricing breakdowns for basic projects with easy access to the roof (such as a standard two-story rowhome or a larger home with an adjacent building that can be used to achieve access) and more complicated projects (which may require a second inspector to be present or the use of additional equipment). Applicants are expected to account for standard variables (such as porches, trees, driveways and grading) and must explain their criteria for differentiating between basic and complicated projects. Applicants should submit estimated pricing for any additional costs to conduct inspections on the more

complicated roofs, such as those requiring a taller ladder, multiple inspectors on-site, or a cherry-picker rental. Contractor should coordinate work to minimize the impact of these additional costs, such as scheduling all work that requires a cherry-picker rental on the same day. Inspections will be paid on a per-project basis.

Contractor should also provide pricing for residential battery storage inspections and ground-mounted systems. Battery storage inspections are anticipated to always be done in conjunction with a solar inspection, but the majority of solar inspections will not have battery storage.

Contractor will be asked to quote a price for commercial projects, as needed, based on the specific property.

Contractor should expect to service a wide variety of housing, building, and roof types which may include, but are not limited to the following:

- a. Attached two, three, and (rarely) four-story homes with flat/low pitched roofs. Access to upper roofs is often possible from adjacent lower roofs – rowhomes or town homes.
- b. Semi-detached twin or duplex homes with roof combinations that can include: flat, pitched, and mansard. Two, three (most common) and four-story homes – twin or Victorian.
- c. Single, detached homes, single or multiple stories, with a sloped roof (range of pitches) – ranch, bungalow, cape cod, craftsman, etc.
- d. Multifamily properties up to four stories tall.
- e. Commercial properties up to four stories tall.

3.1.2. Additional Process Details for Scope 1

The Program Team will select projects for inspection and detail the type of inspection services required, such as property type, enabling upgrades inspection, battery storage inspection, and/or installer repair management, in the project assignment. Contractor will respond as to whether the home's roof access will be considered basic or complicated, as described in section 3.1.1 above. The Program Team will then either approve the project for inspection or select an alternate.

The Program Team will then conduct initial outreach to the homeowner, informing them that Contractor will be calling. Contractor will then be responsible for scheduling with the homeowner and coordinating any additional resources needed for the inspection. Once the inspection is complete, Contractor will share the QAA report with the Program Team within 5 business days.

For inspection projects where installer repair management is not required by the Program Team, Contractor's work is complete after submitting the QAA inspection report. The Program Team should be invoiced for only the cost of the inspection.

If the Program Team stated that an inspection project would require installer repair management and if the inspection *does not* find critical repair issues, Contractor will report that no installer repair management is required because there are no issues that need a resolution. This will be included in the submitted QAA inspection report and Contractor's work is complete. The Program Team should be invoiced for only the cost of the inspection (not including the additional cost of installer repair management though the project was eligible).

If the Program Team stated that an inspection project would require installer repair management and if the inspection *does* find critical repair issues, Contractor will report that repair management is necessary in their submitted QAA inspection report. Contractor will also share the QAA report, with deficiencies, with the solar installer electronically within 5 business days of completion of the inspection.

Contractor will then start the installer repair management work - they will highlight the issues that need to be corrected with the installer and coordinate with the installer to ensure the issues are resolved. Once the issues are resolved, Contractor will provide a high-level report with a summary of the resolution to the Program Team within one month of the initial inspection. Contractor will report all major safety concerns or system shutdowns directly to the Program Team within 24 hours of the inspection. The Program Team should be invoiced for both the cost of the inspection and for installer repair management.

3.1.3. QAA Inspection Requirements

Inspections should be performed based on the latest adopted [National Electrical Code](#) (NEC) and solar industry standards and best practices.

- a. Visual Inspection of Project Site and photo documentation
 - i. General system aesthetics (array leveling, efficient conduit routing, etc.), wire management, safety, and serviceability
 - ii. Visual inspection of the electrical tie in (supply-side or load-side connection)
 - iii. Visual inspection of the mechanical aspects of the system (racking, conduit, etc.)
- b. Visual Inspection of Inverter and photo documentation
- c. Visual Inspection of Array and photo documentation
- d. Visual Inspection of Grounding Method and photo documentation
- e. Visual Inspection of all Roof Penetrations and photo documentation
 - i. When attic access is available, ensuring there is no evidence of water intrusion resulting from the solar installation
- f. Visual Inspection of Balance of System and photo documentation
- g. Visual Inspection of DC Distribution and J-Box and photo documentation
- h. Visual Inspection of AC Distribution and photo documentation
- i. Visual Inspection of Monitoring System and photo documentation
- j. Visual Inspection of Labels and photo documentation
 - i. Adherence to NEC labeling requirements
- k. Complete and thorough inspector remarks for all deficiencies noted citing specific code reference

The following will be excluded from the Contract Agreement:

- a. Electrical diagnostic which cannot be performed based on visual inspection.

3.1.3.1. Specific additional requirements for the SSGP program

PEA is contracted to provide maintenance services on 50 homes from the SSGP program every two years. Contractor will follow the same process as described in Section 3.1.2, but will repeat inspections on a two-year cycle. PEA's contract for these 50 projects states the following specific points of inspection:

- a. Inspecting for damage to panels, including dirt buildup;
- b. Checking for loose hanging wires around the array and those within the array that can be accessed; as well as conducting basic wire management maintenance;
- c. Inspecting terminations within electrical enclosures (including the inverter, AC Disconnect, and Main Service Panel) to ensure wires are terminated well;
- d. Fastener tightening (nuts and bolts) around the perimeter of the array;

- e. Inspecting penetrations around the periphery of systems with roof penetrations to make sure they are watertight;
- f. Ensuring that the roof drainage is adequate, roof drains are not clogged, and there are no signs of water pooling in the vicinity of the array;
- g. Checking for vegetation growth or other new items creating shade (including conducting an updated Solmetric Suneye shading analysis);
- h. Inspecting expansion joints to confirm their efficacy;
- i. Checking for cleanliness throughout the site (debris in the inverter pad area or elsewhere);
- j. Removing moderate amount of installation debris (such as wire insulation stripping, fasteners, installation hardware, or other debris);
- k. Checking for signs of animal infestation under the array;
- l. Review of actual production compared with estimated production and identification of potential causes for discrepancy.

3.2. Scope Option 2: Home Inspections: Energy Efficiency and General Construction

The Program Team seeks Contractors who will be able to conduct either or both of the following types of home inspections on single-family residential homes:

3.2.1. Energy Audits and Quality Control Inspections

These services will include a combination of pre- and post-work inspections. Pre-work inspections will include health and safety testing and energy modeling to inform scope development for energy efficiency and weatherization scopes of work. Inspectors will be asked to identify opportunities for installation of energy conservation measures, including weatherization, insulation, lighting, HVAC equipment replacement, domestic hot water replacement, appliance replacement, window and exterior door repair or replacement. Post-work inspections will include health and safety testing as well as Quality Control Inspections to ensure that work was performed in accordance with code, industry best practices, and work specifications. Contractors must have Building Performance Institute (BPI) certification and equipment to perform combustion appliance zone (CAZ) and blower door testing. Contractor must also be able to perform minimum airflow standard calculations and basic energy modeling. Experience performing services on federally funded projects is highly preferred.

3.2.2. General Whole-Home Inspections

These services will include a combination of pre- and post-work inspections. Pre-work inspections will identify deficiencies with the building structure and envelope, basic systems (plumbing, electric, heating, ventilation, and air conditioning (HVAC)), environmental hazards (e.g. mold, asbestos, lead), and safety risks, as well as opportunities for weatherization and energy efficiency upgrades. These observations will inform the development of the project work scope. Post-work inspections will be performed to ensure that all major health and safety issues have been resolved, and that all work performed was done in accordance with building codes, industry best practices, and program work specifications. Contractors must possess a deep knowledge of home construction and building codes and have familiarity with a variety of building types and ages of construction, including pre-1950s housing stock and rowhomes. The Program Team is interested in seeing Contractor's pre-developed assessment report and is open to using that document, however, Contractor must also be willing to gather and report on information in a manner that is pre-determined by the program.

4. Questions, Proposal Format, and Submission

4.1. Anticipated Procurement Timeline

Milestone	Date
RFP released	April 17, 2025
Deadline to submit RFP questions	May 5, 2025
Responses to RFP questions released	May 9, 2025, at 5pm EST
Deadline to submit Proposals	May 19, 2025
<u>Extended Deadline for Scope 1 Submissions</u>	<u>June 6, 2025</u>
Contractor interviews (estimated)	<u>June 23-July 3</u> May 27-June 6 , 2025
Contractor selections announced (estimated)	<u>July 14</u> June 30 , 2025

4.2. Questions

All questions regarding PEA and PGCC programs, this RFP, and Appendix A: Inspection Services for Solar Installation, Battery Storage Installation, Home Repair, and Energy Efficiency Contractor Response Form must be submitted using [this form](#). Any issues can be emailed to solarize@philaenergy.org.

Responses to questions received before **5pm on Monday, May 5, 2025** will be posted on the RFP pages on the PEA website (<https://philaenergy.org/public-bids/>) and PGCC website (<https://phillygreencapital.org/public-bids/>). Contractors responding to this RFP are urged to check the websites for the responses to the questions. All responses will be issued by **5pm on Friday, May 9, 2025**. Oral responses by any PEA/PGCC employee or agent of PEA/PGCC are not binding and shall not in any way be considered as a commitment by PEA/PGCC.

4.3. Proposal Deadline

Responses to this RFP must be submitted via [this form](#). Contractors will be asked to upload the completed Appendix A: Inspection Services for Solar Installation, Battery Storage Installation, Home Repair, and Energy Efficiency Contractor Response Form and all Exhibits (as separate documents). Responses must be received no later than **5pm on Monday, May 19, 2025**. Responses received after the deadline will not be considered. [The deadline to submit responses for Scope 1: Solar Inspections has been extended to Friday, June 6th.](#)

4.4. Notice to State Requested Exceptions to Contract Terms and Conditions

PEA/PGCC's form of Contract for Services Between Contractor and the Philadelphia Energy Authority/Philadelphia Green Capital Corp. is attached to this RFP as Appendix B. By submitting a Proposal in response to this RFP, the Respondent agrees that, except as provided here, it will enter into

a contract with PEA or PGCC containing substantially the Contract Terms and Conditions contained in Appendix B.

If the Respondent wishes to request revisions to the attached Contract, Respondent must provide an annotated copy of the Contract with the Requested Revisions (Exhibit E). For each requested revision, the Respondent must propose alternative language or terms using tracked changes and state the reason for the request in a comment.

Requested Exceptions to PEA/PGCC's Contract Terms and Conditions will be approved only when PEA and PGCC determines in their sole discretion that a Requested Revision makes business sense, does not pose an unacceptable risk to PEA/PGCC, and is in the best interest of PEA /PGCC. By submitting its proposal, the Respondent agrees to accept all Contract Terms and Conditions to which it does not expressly seek a Requested Revision in its proposal. Blanket reservation of rights to exceptions to the full contract will not be accepted. PEA/PGCC reserves the right, in its sole discretion, to evaluate and reject proposals based in part on whether the Respondent's proposal contains Requested Revision to Contract Terms, and the number and type of such requests and alternative terms proposed.

If, after PEA and PGCC issue a notice of intent to contract to a Respondent, the Respondent seeks Requested Revision to Contract Terms that were not stated in its proposal, PEA and PGCC may, in their sole discretion, deny the Requested Revisions without consideration or reject the proposal.

PEA and PGCC reserve the right, in their sole discretion, (i) to waive any failure to comply with the terms of this Notice if it determines it is in the best interest of PEA and PGCC to do so; and (ii) to require or negotiate terms and conditions different from and/or additional to the Contract Terms and Conditions in any final contract resulting from this contract opportunity.

4.5. The Philadelphia Tax Clearance Statement

It is the policy of the City of Philadelphia and the Program Team to ensure that each Contractor and subcontractor has all required licenses and permits and is current with respect to the payment of City taxes or other indebtedness owed to the City (including, but not limited to, taxes collected by the City on behalf of the School District of Philadelphia), and is not in violation of other regulatory provisions contained in the Philadelphia Code. To assist the Program Team, through the City of Philadelphia Department of Revenue and Department of Licenses and Inspections, in determining this status, each Respondent is required to submit with its proposal a Tax Clearance Certificate from the City of Philadelphia which can be requested at <https://www.phila.gov/services/payments-assistance-taxes/taxes/get-tax-clearance/>. This document should be submitted as Exhibit D of the Proposal.

If the Respondent is not in compliance with the City's tax and regulatory codes, an opportunity will be provided to enter into satisfactory arrangements with the City to achieve compliance. If satisfactory arrangements cannot be made, Respondents will not be eligible for award of the contract contemplated by this RFP.

The pre-approved Respondent will also be required to assist the Program Team in obtaining the above information from its proposed subcontractors. If a proposed subcontractor is not in compliance with City Codes and fails to enter into satisfactory arrangements with the City, the non-compliant subcontractor will be ineligible to participate in the contract contemplated by this RFP and the pre-approved Respondent may find it necessary to replace the non-compliant subcontractor with a compliant subcontractor. Respondents are advised to take these Program Team policies into consideration when entering into their contractual relationships with proposed subcontractors. If a Respondent or a proposed subcontractor is not currently in compliance with the City's tax and

regulatory codes, please contact the Revenue Department to make arrangements to come into compliance at 215-686-6600 or revenue@phila.gov.

Respondents need not have a City of Philadelphia Business Income and Receipts Tax Account Number (formerly Business Privilege Tax Account Number) and Commercial Activity License Number (formerly Business Privilege License Number) to respond to this RFP, but will be required to obtain both prior to commencing work if pre-approved for award of the contract contemplated by the RFP.¹ Applications for a Business Income and Receipts Tax Account Number or a Commercial Activity License² may be made online by visiting the City of Philadelphia Business Services Portal at <https://eclipse.phila.gov/phillylmsprod/pub/lms/Login.aspx> and selecting eCLIPSE to submit online applications. If you have specific questions, call the Department of Revenue at 215-686-6600 for questions related to City of Philadelphia Business Income and Receipts Tax Account Number or the Department of Licenses and Inspections at 215-686-2490 for questions related to the Commercial Activity License.

4.6. Good Faith Efforts

This procurement and all procurements of subcontracts by Contractor(s) are subject to the six good faith efforts for contracting with disadvantaged business enterprises (DBEs) specified at 40 CFR 33.301 and incorporated by reference. The Program Team encourages DBEs to apply to the RFP. The Program Team additionally encourages non-DBE Respondents to subcontract with DBEs and encourages consortiums of DBEs to apply for this RFP if the contract is too large for one firm to handle individually. If the contract is funded through SFA, Contractor(s) will be required to submit information on their total procurement and DBE procurement annually to enable PGCC and PEDA to complete EPA Form 5700-52A.

4.7. Format for Proposals

All proposals in response to this RFP must submit all relevant requested information in Appendix A - Inspection Services for Solar Installation, Battery Storage Installation, Home Repair, and Energy Efficiency Contractor Response Form, which is a fillable PDF form. When the form is completed, it must be saved with a file name that includes the Respondent's business name (e.g. "Inspection Services Response Form for Sunshine Solar, Inc.").

Respondent Background Information (Parts I - II) requires information about Contractor's business, location, employees, revenues, management, subsidiaries, affiliates, and business relationships, as well as details about Contractor's operations and capacity.

Scope Selection (Part III) requires Contractor to select which options they will be applying to. Within Scope Option 1, Contractor should select whether they can provide the services of coordinating installer repairs and enabling upgrade inspections.

Scope 1 Responses (Parts IV-VIII) requires Contractor's inspection history for residential systems and battery storage in 2021-2024 and requests customer references. These sections also include

¹ Respondents that have a Business Privilege Tax Number should use that number, as it is automatically their Commercial Activity License Number, and need not apply for a new Commercial Activity License Number. Similarly, Respondents with a Business Privilege Tax Account Number should use that number as their Business Income and Receipts Tax Account Number.

² Commercial Activity Licenses are not typically required for non-profit organizations; however, Business Income and Receipts Tax Account Numbers typically are required.

Contractor's proposed pricing for standard and non-standard roofs, ground-mount systems, additional costs for a battery system, and estimated pricing for any further additional costs, as well as client references. Inspectors are eligible to apply even if they do not have prior experience working in Philadelphia. The three customer references required in the RFP are not required to be Philadelphia projects. Strong applicants will be able to show familiarity and experience working with the region's housing stock, which includes rowhome construction.

Scope 2 Responses (Parts IX-XIV) requires Contractor to indicate their intention to pursue 1) Energy Audit and Energy Efficiency Quality Control Inspections, 2) General Whole-Home Repair inspections, or 3) both inspection typologies. Each section of the Scope 2 Responses requires Contractor to indicate their experience and qualifications to perform the scope(s), provide information about staff, and furnish references from previous clients. These sections also include Contractor's proposed pricing for each inspection type, as well as a prompt to provide other pricing considerations.

Respondent's Signature (Part XV)

Exhibits (Part XVI) Exhibits must be saved as PDFs and submitted electronically.

- a. Exhibit A: Copies of applicable licenses such as: Philadelphia Contractor and Electrical Contractor Licenses and NABCEP certifications (or certification numbers).
- b. Exhibit B: 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.
- c. Exhibit C: Current certificates of liability and workman's comp insurance (COI).
- d. Exhibit D: City of Philadelphia Tax Clearance Certificate (the certificate can be obtained [here](#)).
- e. Exhibit E: Requested revisions to the Contract, provided as an annotated copy of Appendix B.
- f. Exhibit F: (Optional) Respondent's Diverse Business and Local Hiring Plan. Though not required, Respondent is invited to explain its 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:
 - i. 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.
 - ii. 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.
- g. Exhibit G: [Scope 1] Responses to the questions in Part IV. Technical Proposal and Part V. Capacity for Solar Inspections.
- h. Exhibit H: [Scope 1] Contractor's sample inspection sheet or scoring report, along with an explanation of the framework for scoring and determining how a project passes or fails.
- i. Exhibit I: [Scope 1] A list of 10-20 past residential or commercial projects inspected, preferably in the Southeast PA area, including and preferably 5-10 within Pennsylvania, and preferably at least 3 solar+storage projects.
- j. Exhibit J: [Scope 1] Resumes for key personnel.
- k. Exhibit K: [Scope 2] Responses to the questions in Part IX- Home Energy Audits and Quality Control Inspections.
- l. Exhibit L: [Scope 2] Energy Audit and Energy Efficiency Quality Control Inspection staff resumes.
- m. Exhibit M: [Scope 2] Samples of Energy Audits and Quality Control Inspection Reports.
- n. Exhibit N: [Scope 2] Responses to the questions in Part XII General Whole Home Inspections.

- o. Exhibit O: [Scope 2] General Whole Home Repair staff resumes.
- p. Exhibit P: [Scope 2] General Whole Home Repair Inspection Reports.
- q. Exhibit Q: [Required] Signed Byrd Anti-Lobbying Certification (provided as Attachment 1 and as an independent fillable pdf document on the RFP page).

5. Public Disclosure and Confidential Information

All Responses, Exhibits, and other information submitted in response to this RFP are subject to the public disclosure requirements of applicable law, including the Pennsylvania Right to Know Law, to which PEA is subject. To the extent permitted by applicable law, PEA will use its best efforts to keep from public access specific information that is identified by Contractor as confidential. If a Contractor claims an exception to public disclosure requirements and desires that PEA keep certain information from public disclosure, then Contractor must include a notice in the Proposal as follows:

“Confidential Information Notice Pages _____ of this Proposal, identified by a bold vertical line along the right-hand margin, contain information that is excluded from public disclosure under applicable law. Contractor requests that such marked information be utilized by PEA only for evaluation of this Proposal, but Contractor understands that PEA is bound by applicable law and that such information may be disclosed in accordance with such law. The legal basis for the claim for protection of the marked information from public disclosure is set forth as follows: [Contractor to provide basis].”

Notwithstanding any such notice, however, PEA may disclose such marked information to individuals participating in the review or evaluation of Proposals, including members of the Selection Committee, other PEA employees, and advisors, attorneys, and consultants.

6. Minimum Eligibility Thresholds

Respondents must meet the minimum eligibility thresholds below to be considered for a contract:

- Respondents must not be debarred by any federal, state, or local government agency.
- Respondents must be in good standing with federal, PA, and Philadelphia taxes.
- Respondents must not have a history of bankruptcy, regulatory violations or noncompliance, or fraud.
- Respondents must not be an entity owned by, controlled by, headquartered in, or subject to the direction of a government of a covered nation under 10 USC 4872(d), nor a subsidiary of such an entity. As of the date of the SFA Terms and Conditions, covered nations under 10 USC 4872(d) are the Democratic People’s Republic of North Korea, the People’s Republic of China, the Russian Federation, and the Islamic Republic of Iran.
- Respondents must have proper licensing and insurance.

7. Evaluation Criteria

Proposals in response to this RFP will be evaluated by a Selection Committee made up of PGCC and PEA employees. PEA may invite finalists to make a brief oral presentation and be interviewed by the Selection Committee and may conduct reference checks to confirm quality of previous work. Selection criteria may include:

- a. Capacity of Company & Team Qualifications: (30%)

- i. The firm’s qualifications of key personnel, financial strength, and capacity to complete the project tasks.
 - ii. Ability to provide timely, quality customer service, inspection, and installer management services. Selected Contractors must be able to demonstrate sufficient staff capacity to successfully carry out this program (e.g. number of dedicated inspection crews).
 - iii. For Scope 1: Corresponds to Parts I-II, Part V, and Exhibits A, B, C, D, E, F (optional), G (Part V responses), and Q.
 - iv. For Scope 2: Corresponds to Parts I-II, Part IX and/or XII (staff qualifications), and Exhibits A, B, C, D, E, F (optional), K and/or N (staff qualifications), and Q.
- b. Relevant Experience and Technical Proposal: (35%)
 - i. The firm’s demonstrated experience and technical competence related to project tasks, including references from prior clients.
 - ii. Scope 1 additional explanation:
 - 1. Clear explanation of what Contractor considers to be basic roofs vs complicated roofs and what additional costs may be expected on top of a complicated roof. Contractors with more expansive definitions of basic roofs/fewer access limitations will be prioritized.
 - 2. Contractors with the experience & ability to inspect solar, enabling upgrades, and battery storage projects will be prioritized over contractors with exclusively solar experience.
 - 3. Scope 1 Contractors should demonstrate proficiency with the flat roofs common in Philadelphia rowhomes. The Program Team is also interested in Contractors who can work on more advanced structures like pergolas or roof decks. Respondents should note if Contractor does not serve certain types of roofs.
 - iii. For Scope 1: Corresponds to Part IV, Part VI, Part VIII, and Exhibits G (Part IV responses), H, I, and J.
 - iv. For Scope 2: Corresponds to Parts IX and/or XII (relevant work experience & documentation/reporting), Parts XI and/or XIV, and Exhibits K and/or N (relevant work experience & documentation/reporting), L and M, and/or O and P.
- c. Cost Proposal (35%)
 - i. High cost-effectiveness and efficient use of funds.
 - ii. For Scope 1: Corresponds to Part VII.
 - iii. For Scope 2: Corresponds to Part X and/or XIII.

The Contract for Services for Solarize Philly and SSGP is included here as Appendix B. If PEA and PGCC elect to issue multiple contracts under this RFP funded by different federal, state, and/or local sources for successor programs, contracts funded by such sources may include additional terms. Required terms and conditions for contracts supported by federal funds are included as Exhibit C to Appendix B, including terms & conditions that need to be passed down to subcontractors. By responding to this RFP, Respondent agrees to the terms of the Contract, except as specifically provided in Section 4.4 of this RFP. To ensure objective contractor performance and eliminate unfair competitive advantage, contractors that develop or draft specifications, requirements, statements of work, or invitations for bids shall be excluded from competing on those procurements.

8. The Program Team’s Additional Procurement Rights

The Program Team reserves the right to modify this selection process, which may be exercised in its sole discretion at any time during the procurement process to:

- a. Cancel this RFP or the procurement process, with or without the substitution of another pre-qualification or procurement process;
- b. Waive any informality, defect, non-responsiveness, or deviation in a Proposal, or other submission, that is not material;
- c. Require one or more Contractors to supplement or clarify the Proposal or to provide additional information after the submission of Proposals including with respect to any exceptions to PEA/PGCC's Contract Terms and Conditions;
- d. Take any action affecting the RFP process that would be in the best interests of PEA, PGCC, or City;
- e. Conduct investigations and make inquiries concerning any aspect of any Proposal;
- f. Reject any or all Proposals;
- g. Reject a Contractor that has been delinquent or unfaithful in the performance of any contract with or obligation to the PEA, PGCC, or the City; is financially or technically incapable; or is otherwise not responsible; and/or
- h. Make judgments about the contents of any Proposal with respect to the requirements and criteria set forth in this RFP.

9. Costs

Any and all costs incurred by Contractor, or other party in connection with this RFP or other aspect of the procurement process shall be at such party's expense and risk. The Procurement Team accepts no liability and will not be responsible under any circumstance for any cost or expense incurred to respond to this RFP or otherwise participate in the procurement process.

10. Indemnification

Respondent agrees to hold harmless and indemnify the Issuers, their officers, employees, agents, consultants and representatives, individually and collectively (for purposes of this section, the "Indemnified Parties"), from and against, and shall assume all liability for, any and all losses, expenses, demands, claims or damages of any kind whatsoever (including loss of use), including losses, expenses, or damages sustained by the Indemnified Parties, arising out of, related to, or in connection with the Respondent's preparation and submission of a Response and any actions Respondent takes in connection therewith, including, but not limited to, the actions of the Respondent's principals, members, directors, officers, employees, contractors, consultants, representatives and agents, and shall defend any suit or action brought against any Indemnified Party, based on any such alleged injury (including death) or damage (including loss of use), and shall pay all damages, judgments, costs, and expenses, including attorneys' fees in connection with said demands and claims resulting therefrom.

1. Attachment 1 – Byrd Anti-Lobbying Certification

BYRD ANTI-LOBBYING CERTIFICATION

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.
4. The responding Respondent listed below certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Respondent understands and agrees that the provisions of 31 U.S.C. Ch. 38, Administrative Remedies for False Claims and Statements, apply to this certification and disclosure, if any.

Solicitation Name: Inspection Services for Solar Installation, Battery Storage Installation, Home Repair, and Energy Efficiency

Responding Vendor Name:

Physical Address (Address, City, State, Zip Code):

Signature of Bidder's Authorized Official:

Name and Title of Vendor's Authorized Official:

Date:

SIGN AND RETURN THIS FORM WITH YOUR SUBMISSION