



**CITY OF NORMAN
NORMAN MUNICIPAL AUTHORITY
CLEVELAND COUNTY, OKLAHOMA**

REQUEST FOR PROPOSAL

City of Norman Community Group-Purchasing Solar Program

**City of Norman
Utilities Department
Environmental Resilience and Sustainability
225 North Webster Avenue, 73069
Post Office Box 370
Norman, Oklahoma 73070**

**Norman Utilities Authority
RFP-2324-20
January 2, 2024**



PUBLIC NOTICE
REQUEST FOR PROPOSAL
R.F.P. NO. 2324-20

The City of Norman, Oklahoma, is soliciting proposals for a contractor to partner in a solar community group-purchasing program to accelerate and reduce the cost of solar installation.

Expected services will include marketing and outreach, as well as pricing and installation services, to help create a community group-purchasing solar initiative, titled, Norman – A Solar Initiative.

Any correspondence, questions or requests for copies of the Request for Proposal can be directed to Michele Loudenback, RPES, CFM, Environmental and Sustainability Manager by phone at (405) 307-7130 or by email at michele.loudenback@normanok.gov.

Proposals must be received by the Utilities Department, Division of Environmental Resilience and Sustainability, by 4:00 P.M., January 29, 2024, 225 N. Webster Ave. (73069), P.O. Box 370, Norman, Oklahoma 73070.



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I. INTRODUCTION

A. Requesting Entity Information

The City of Norman, Norman Utilities Authority, and Norman Municipal Authority (collectively the CITY), with municipal offices located at 225 N Webster, P.O. Box 370, Norman, Oklahoma 73070, is the requesting entity.

B. Project Overview and Objective

The City is seeking proposals from firms interested and qualified to help lead and participate in a community group-purchasing solar energy program titled, Norman – A Solar Initiative (the group-purchasing program). This group-purchasing program will allow Norman residents to purchase solar panel systems at discounted unit prices by (1) combining their orders to get better material pricing, (2) helping lower solar installers' soft costs through improved conversion rates for solar leads, and (3) offering a tiered pricing structure that is based on the number of households participating.

This program is a local coordinated effort to encourage and support community members, including business, homeowners and nonprofits, to install solar photovoltaic (PV) energy systems, most commonly on their home or building's rooftop. The solar PV system then generates carbon-free electricity that the participant can use, reducing the amount of grid-supplied electricity they need from their electric utility provider. By participating in this effort, customers receive a group discount and ease of use. This model addresses concerns surrounding adoption of solar PV energy systems, including cost and lack of knowledge.

This type of program holds significance in several ways. Rooftop solar not only lowers energy bills but also reduces Greenhouse Gas (GHG) emissions from the power sector. It contributes to enhanced grid resiliency through distributed energy generation and empowers participants by granting them more control over their energy sources.

The Selected Contractor will collaborate with City staff and certain stakeholders to roll out a community marketing, education, and outreach campaign with the goal of securing 60+ residential and commercial contracts for solar energy and/or battery storage installations over the course of sixteen (16) weeks. Installations are anticipated to continue beyond the outreach period with the goal of all installations complete on or before **March 31, 2025**. All of the Initiative residential and commercial participants that enroll in the program will be exclusive leads advanced to the Selected Contractor, who will provide the services described in this RFP, including responsive participant communication, a transparent pricing/financing structure, accurate design and engineering proposals, and turnkey design and installation services



The objectives of the Initiative campaign are to:

1. Lower the cost of solar energy and battery storage installations through the power of group-purchasing and reduced contractor acquisition costs and to transfer those savings to the residential and commercial residents of the City;
2. Educate consumers and cultivate a sense of community participation and ownership in the clean energy market;
3. Enhance the implementation of solar energy systems and battery storage installations with a focus on sustaining long-term viability beyond the Initiative campaign period;
4. Reduce the energy burden of vulnerable residents in the City through additional measures available to low and moderate income families to reduce upfront cost; and
5. Advance and encourage renewable energy workforce development opportunities.

The purpose of this Request for Proposal (RFP) is to select a solar energy firm(s) specializing in the design and installation of solar photovoltaic systems to help lead and participate in “Norman – A Solar Initiative”, a community group-purchasing solar program and to provide services to residential, commercial, tax-exempt (including non-profits and municipal departments) and Low-to-Moderate Income (LMI) customers who choose to participate in the Norman – A Solar Initiative group-buying program.

Respondents to this RFP will provide proposal(s) for one or multiple classifications including residential, commercial, and nonprofit, for the installation of solar energy, battery storage and/or other clean energy applications. Bids received by the due date **January 29, 2024 at 4:00 PM** will be reviewed and evaluated by the City. One lead solar contractor¹ will be selected (“Selected Contractor”) to provide products and services to all residential and commercial solar participants for the Initiative.

II. Norman – A Solar Initiative Campaign Summary

This section provides a summary of the Initiative campaign activities and responsibilities. The success of the campaign depends upon the collaboration of the City (and its community team), the Selected Contractor, and the participating community members (participants).

A. Anticipated Roles and Responsibilities

1. **The City** will work with the selected contractor to find hosts for solar open houses and events, as well as help build partnerships among

¹ Bidding contractor may partner or subcontract with other Engineering, Procurement, and Construction firms subject to Section VI. E. of this request for proposal.



various community leaders/organizations to help with outreach. Additionally, Norman will help implement community outreach through hosting outreach events, tabling at existing community events, and sending regular campaign updates to community contacts while helping set community expectations by helping customers understand the campaign approach, goals and methods. Finally, the City will help answer community questions about the campaign, basic solar energy questions, and direct customers to available resources.

2. **The Selected Contractor** will work with the city to find hosts for solar open houses and events. Additionally, they will provide competitive, transparent pricing (on a tiered basis, dependent on number of community participant contracts obtained); give free site assessments; help customers understand and apply for incentives; help manage customer expectations through communication and transparency; and, assist customers with assessing purchase/financing options. To help the campaign reach its goals, the contractor will also collaborate with the City for outreach planning; present at events and workshops; lead community events as appropriate; publicize the campaign on website and social media pages; and, supplement community outreach with direct mail, yard signs, and other similar marketing and outreach activities.
3. **The Customer** is anticipated to provide all necessary information, be responsive to scheduling requests, help promote the campaign through social media and networking circles, consider volunteering to help with the campaign, and attend educational event and ask questions.

B. Contractor Proposal Submission Process

Each contractor shall carefully examine this RFP and any and all amendments, revisions, and other data and materials provided with respect to this RFP process. Contractor should familiarize themselves with all proposal requirements prior to submitting their proposal.

Should a bidding contractor note any discrepancies, require clarifications or wish to request interpretations of any kind, the bidding contractor must send a written request by email to michele.loudenback@normanok.gov for clarifications which will be accepted until **5:00PM CST on January 22, 2024**. The City will promptly respond and make both the question and answer public via the online RFP page. Bidding Contractors are highly encouraged to visit the online RFP page from time to time before submitting written requests to michele.loudenback@normanok.gov.

Proposals must be received by the Utilities Department, Division of Environmental Resilience and Sustainability no later than 4:00 PM Central Time on January 29, 2024, at 225 N. Webster (73069), P.O. Box 370, Norman, Oklahoma 73070 for hardcopy submissions or by email at michele.loudenback@normanok.gov for electronic submissions. Consideration for proposals received after the aforementioned date and time will be at the City's sole discretion. A copy of this



RFP can be found online at the following link:
<https://www.normanok.gov/businesses/bids-rfps-rfqs>.

A duly authorized official of the organization must sign the proposal. No reimbursement will be made for any cost incurred in preparing the proposal or for any cost prior to a formal award of contract.

Proposals must include all elements outlined in [Section VI: Proposal Format and Requirements](#) as listed below:

1. Cover Letter
2. Company and Project Team Experience
3. Program Implementation Plan
4. Participant Experience
5. Partnering and Sub-Contracting with Other Contractors (if applicable)
6. Offerings for Homes Where Fixed Solar PV Is Not Feasible
7. Unique Challenges
8. Outreach and Marketing Strategy
9. Pricing Structure and Financing Options
 - a. Tiered Pricing Structure
 - b. Lease/PPA Contracts
 - c. Increased Pricing Factors
 - d. Adders
10. Community Project
11. Low- and Moderate-Income Projects
12. Attachment A: Contractor Profile
13. Attachment B: Pricing Proposal
14. Attachment C: Equipment Specifications
15. Attachment D: Additional Cost Factors and Price Adders
16. Attachment E: Pro Forma

C. [Community Outreach Campaign](#)

The Initiative will include widespread community education about the benefits of solar energy and outreach to inform residents of the group-purchasing initiative during the course of the campaign. The Selected Contractor will work with the City to coordinate messaging and activities. The City will assist with public workshops and events, open house events, media outreach, email, social media and online marketing, along with other activities to encourage area residents and businesses to enroll in the program. The Selected Contractor is required to have staff available to attend a series (4-6) of informational workshops they have designed to educate the community about the Initiative program, benefits of solar, meet campaign stakeholders and participate in a Q&A session. Additionally, the Selected Contractor should be prepared to have staff attend up to 2-3 press or other similar events throughout the course of the campaign.

The Selected Contractor will agree to market to Norman residents only under the Initiative brand in the Project Area for the duration of the Initiative campaign



period and through the completion of all installations. All potential customers in Norman must be offered the finalized, discounted pricing via the tiered pricing schedule for the duration of the campaign period.

D. Customer Engagement Process

The City will collaborate with the Selected Contractor to create a customer engagement process. The following is an example of the kind of process the City anticipates.

1. Enrollment

- a. Interested residential and commercial participants will enroll through a dedicated campaign webpage, hosted on the City of Norman platform. Said webpage will include relevant campaign information including the campaign, information about the Selected Contractor, selected materials, tiered pricing schedule, financing options, and processes.
- b. Participants will provide address and electricity bill information. Participant data will be accessible to the Selected Contractor and the City through a workflow process to be developed in collaboration with the Selected Contractor. The Selected Contractor is expected to make initial contact to participants as soon as possible upon receipt of participant information.
- c. The Selected Contractor will collaborate with the City to establish an effective method for reporting program progress on an agreed-to basis throughout the campaign.

2. Solar Assessment

- a. Initial Solar Assessment: The initial solar assessment includes a desktop review of property and utility bill information. This may include site assessment through satellite imagery and the creation of an energy load profile. The initial site assessment is to determine solar radiance on the property, rooftop conditions, property orientation, estimate the appropriate system size, and conduct an initial analysis of payback and returns. The purpose of the initial solar assessment is to screen participant property to determine suitability of solar and participant ability to finance the system. Participants whose sites are not suitable for solar will be promptly informed, with explanation provided, by the Selected Contractor. This information shall also be shared with City staff campaign organizers.
- b. Detailed Assessment: Upon confirming the suitability of participant property for solar and/or battery storage following a phone or email screening, the Selected Contractor will compile a comprehensive solar assessment report. This report will encompass, but is not confined to, visual representations of the solar energy system on the roof or land, participant energy load profile, environmental benefits, and financial analysis.



- c. Site Visit: A site visit includes but is not limited to meeting the participant; taking measurements; shading analysis; determine tilt and orientation; verify annual energy production, and note any electrical, mechanical, or structural considerations that may incur costs above and beyond the standard pricing schedule for the project. Site visits may be clustered to reduce Contractor costs.

3. Customer Quotes

- a. In all customer quote materials, the Selected Contractor must use the current utility rate for the participant (e.g. kWh AC rate), or the rate the customer will use with the addition of solar (e.g. time-of-use, Net-Energy Billing Option). The Contractor may use a set escalator rate for predicted electric utility price increases at no greater than 2% per year in predicting payback periods, and make clear that all figures are based on given assumptions.
- b. Upon request by the customer, the Selected Contractor is expected to provide multiple assessments based on the type of financing and ownership structure desired without additional cost to participants.
- c. The Contractor must clearly specify all other assumptions for their estimates, including derate factors for their equipment; estimated annual energy production based on the region of the system as per the PV Watts estimator (www.pvwatts.nrel.gov) (or other industry accepted resource, including PVSyst or NREL System Advisor Model) taking into account panel orientation and shading; estimated annual AC energy production decline over 25 years, and any other relevant factors.
- d. Renewable energy credit (RECs) valuations may not be included in financial analysis reports produced as a part of project.
- e. Selected Contractor must clearly represent to potential participants that, previous to signing a contract with the Selected Contractor, they are free to independently seek other offers.
- f. All Selected Contractor claims regarding federal tax credits or other tax benefits must include a disclaimer that the participant contact a tax professional to determine how tax incentives apply to them.

4. Contracting

- a. Selected Contractor contracts should explain and itemize materials, system type, cost, sizing, and energy production.
- b. Individual system designs should be aesthetically pleasing, taking into consideration the preferences of participant; local zoning and building codes; historic preservation, and HOA regulations while minimizing project costs and maximizing solar energy production.
- c. Participants whose sites are feasible for solar will be offered the pricing and financing options established in the Selected Contractor's submitted **Attachment B: Pricing Proposal**.
- d. Selected Contractor shall be responsible for verifying ability to interconnect at any address before entering into a contract.



5. Installations

- a. The Selected Contractor will provide turnkey installation including permitting and inspections, utility interconnection and commissioning services for eligible and interested participants.
- b. The Selected Contractor will provide a clear list of work to be performed and estimated schedule to all participants.
- c. The Selected Contractor is responsible for timely completion of each installation. If and when the Selected Contractor geographically clusters installation work to reduce costs, they must communicate that clearly to the affected participants.
- d. The target date for completion of all installations is before March 31, 2025.
- e. The Selected Contractor will continue to communicate progress to City staff until all installations are complete.

E. Low- and Moderate-Income Program

In addition to providing group discount pricing on solar energy, battery storage, and other clean energy technologies to all participants, the Project will include a program to help reduce the energy burden for low-income and moderate-income (LMI) residents in Norman.

The Selected Contractor will be expected to take part in this program by assessing select properties and provide installation services just as is done for all participants, as well as providing assistance in finding funding through financing and/or capital, as appropriate.

F. Community Project

As part of the Initiative campaign, the Selected Contractor will take part in a charitable community project (this is in addition to the LMI Program described above). The location(s), and beneficiary(ies) of the project will be determined by the City. The Selected Contractor will collaborate with the City to design, develop, and construct the project(s) as well as partially finance the project from a percentage of total The Initiative revenues. See Section VI. Item K. below for more details on the Community Project.

III. **THE INITIATIVE TIMELINE**

Milestone	Date
RFP Release	1/2/2024
RFP Bids Due	1/29/2024
Interviews with Contractor(s), if Appropriate	2/6/2024
Announce selected solar installer	2/14/2024
Council Approval of Contract	2/27/2024



Campaign Launch Event (Signups Begin)	3/5/2024
Campaign Public Outreach and Education Events	2/28/2024-5/17/2024
Customer signup period ends	6/30/2024
Deadline for residential contracts	8/31/2024
Deadline for commercial contracts	12/31/2024
Residential installations complete	12/31/2024
Installations complete	3/31/2025

IV. CONTRACTOR ELIGIBILITY THRESHOLD REQUIREMENTS

In order to be eligible to submit a proposal, Solar Contractor must:

- A. Demonstrate experience and proficiency in solar energy installations through a minimum of two years of solar energy project installations and through the demonstrated installation of a minimum of seven (7) solar PV projects, at least two (2) of which should be commercial property systems with a capacity to generate at least 200 kW. Five (5) of the seven projects should be projects that were installed in Oklahoma.
- B. With a goal of supporting the local solar industry, preference will be given to firms located within Oklahoma.
- C. Be, at minimum, licensed to conduct business in Oklahoma and registered with the Oklahoma Secretary of State and the Construction Industries Board.
- D. Include on the project team at least one licensed electrical contractor with Oklahoma privileges.
- E. Include on the project team at least one NABCEP Associate-level certification. Preference for board-certified specialist group.
- F. Maintain standard insurance policies for Worker's Compensation (\$1,000,000 per accident) and Commercial General Liability (\$2,000,000 per occurrence). All coverage maintained by Contractor shall be primary to any insurance coverage carried by Participant, shall contain waivers of subrogation, and shall not be amended or terminated without notice to Participant. Proof of this coverage will be provided by the Selected Contractor.
- G. Proposals must be received by the Utilities Department, Division of Environmental Resilience and Sustainability, by 4:00 P.M., January 29, 2024, at 225 N. Webster (73069), P.O. Box 370, Norman, Oklahoma 73070 for hardcopy submissions or by email at michele.loudenback@normanok.gov for electronic submissions.

V. SELECTION PROCESS

- A. Right to Reject



The City unequivocally reserves the rights to reject any or all proposals, to waive any informality or minor defect, and to award a contract, if any, in the best interest of the City without further explanation or liability to any party.

B. Criteria

The RFP Selection Committee will be composed of City staff and volunteer community members. Proposals will be scored in the following categories, with a maximum possible score of 100 points. The final scoring of each proposal will be at the exclusive discretion of the RFP Selection Committee.

Subject	Description	Top Score Possible
System Quality	Evaluates the quality and performance of the proposed equipment including panels, inverters, racking systems, and batteries. Panels should be Tier 1 according to Bloomberg New Energy Finance Corporation, have efficiencies greater than 17% and be rated for wind loads up to 150 mph.	20
Pricing	Assesses the proposed tier prices for base turn-key solar PV systems provided by the respondent and ranks them competitively. Project “Adders” should be reasonably priced when compared with market rates. Additional consideration will be given to the extent bulk-purchasing of “adder” materials such as battery storage and EVSEs are provided. Respondents are encouraged to show a tiered-pricing, group-purchasing schedule for adder materials in <u>Attachment D</u> where possible.	20
System and Workmanship Warranty	Evaluates the equipment warranty of the proposed panels and inverters along with the proposed workmanship warranty provided by the Contractor. Panels require a 25 year power warranty with 80% of nameplate power by year 25. Inverters require a warranty of at least 15 years for microinverters and 10 year for string inverters, however longer inverter warranty periods will be viewed favorably. The contractor workmanship warranty are required to be at least one year; however, longer workmanship warranty periods will be viewed favorably. All warranties need to be transferrable without limitation to number.	15
Contractor Experience, Implementation Plan	Evaluates the respondent based upon their number of years in business, the quality and experience of the proposed project team, the number and size of projects previously completed. Assesses the respondent’s proposed plan for tracking leads, handling project volume, customer service, proposed timeline from site evaluation to contract to installation, and their ability to handle projects within HOAs and historic districts.	15



Hiring	Assesses Contractors willingness and ability to hire from within the Project Area, including creating or participating in training programs for low-income and at risk populations.	5
Local Preference	With a goal of supporting the local solar industry, preference will be given to firms located in the state of Oklahoma.	5
System Aesthetics	Evaluates the degree to which selected components and installations are aesthetically pleasing and blend in with structure and adjacent surroundings.	2.5
Financing	Assesses Contractor's ability to offer financing options to program participants including innovative financing options for the low-income community.	5
Innovative Concepts	Assesses the level of innovation the respondent proposes as a part of the core project and as additional items of value for customers to consider. Innovative ideas may be associated with creative use of outdoor spaces, energy efficiency solutions, solutions for low-income communities, early-bird bonus for early signups, equipment upgrades, incentives for early adopters, support for the community project, and models for financing or leasing equipment to low-income communities as a part of the project.	5
Community Project	Evaluate the ingenuity, level of commitment (i.e., monetary contribution), and services the respondent proposes for a project to support the community.	5
Marketing Plan	Assesses the respondent's ability to support education and marketing efforts associated with the project. This will be evaluated on the quality of the promotional materials and the level of support offered for the educational and promotional portions of this project.	2.5

C. RFP Review Process

The City will review proposals that meet the requirements herein and are received prior to the designated closing date. Firms without adequate insurance, in minimum amounts set forth herein to protect the City's interests, may not be considered or evaluated.

Based upon the preceding criteria, a selection committee will review and rank all proposals through its own judgment and process. At the City's discretion, up to the three highest ranked firms may be brought in for interviews. The selection committee will re-rank these firms through its own judgment and process, and the highest ranking firm will then be selected but, at the discretion of the City, may be asked to make a brief presentation for further evaluation. The City will then attempt to negotiate a fair and reasonable contract with the highest-rated firm. If unsuccessful, the City shall follow with the next, highest-rated firm(s) until successful.



D. Inquiries

If you have any questions regarding this RFP, please contact Michele Loudenback RPES, CFM, Environmental and Sustainability Manager by phone at (405) 292-9731 or by email at michele.loudenback@normanok.gov.

VI. PROPOSAL FORMAT AND REQUIREMENTS

The Core Proposal must be submitted as a single PDF document and should be concise and prepared without the use of elaborate marketing materials or non-essential text. Each page must be numbered and include the company's name. Clearly label each of the subsections outlined below:

A. Cover Letter

Include cover letter (one page) signed by authorized company representative on company letterhead. The cover letter should summarize highlights, key features, and distinguishing points of the proposal, as well as any unique problems identified and proposed solutions.

B. Company and Project Team Experience

Describe the bidding Contractor: Highlight relevant experience, skills, and capabilities necessary to undertake this type of campaign, including, but not limited to, number of systems, and kW capacity installed in each of the last 3 years, how long the company has been in business, ability to handle a large number of leads and projects over a short timeframe. Do not repeat information provided in **Attachment A**.

Identify all members of the project team, including, but not limited to, sub-Contractors and/or partners assisting in project financing, participant service, outreach, and project installations. Include a brief description of each member's experience and role. Include an organization chart of your company and the project teams.

Identify ability to hire from within the Project Area. This includes current job openings, apprenticeships, or training programs offered by Contractor and any partnerships with schools or programs in the Project Area.

C. Program Implementation Plan

Outline the intake process for participant leads; method for screening sites and follow-up with those participants; and data-tracking systems for leads, participants and installations.

Describe a plan for ensuring that Contractor has adequate capacity to accommodate the anticipated increase in volume of leads, including initial contact with participants, site visits, follow-up visits, outreach events, and installations. Estimate the number of residential and small commercial solar PV projects the Contractor could reasonably complete on a monthly basis. Describe a contingency plan if outreach results in a workload exceeding the Contractor's expectations and staff capacity.



The plan should include an anticipated installation schedule based on your expectations for the campaign and the Contractor's strategy for completing installations no later than 120 days after contract approval for each participant. For these estimates, an average system size of 5kW may be used. Include an assessment of the firm's upper limit of capacity for site assessments and installations within a given time period. Provide information about how many site assessments and quotes the firm can perform on a weekly basis. Include details outlining the number, size and types of systems per set time-period that your firm or subcontractors are capable of installing, and what factors are accounted for in these estimates.

Describe the internal quality assurance process for the solar PV equipment and installations, including any Contractor warranties on equipment installed and/or labor. Manufacturers' warranties for equipment components should be listed in **Attachment C**, Equipment Specifications.

Describe the operation and maintenance agreement that will be offered to participants, and describe the provisions to address scheduled and corrective maintenance, system monitoring and communications protocols, as well as associated participant costs for each, if applicable.

D. Participant Experience

Describe the process a participant will experience from inception as a lead to project completion or determination that the participant site is not viable for solar. Please include:

- i. All aspects of participant experience, including site evaluation, securing of any financing or leasing or PPA agreement arrangements, installation, and any follow-up;
- ii. Information on quality assurances to participants and examples that might indicate exemplary participant experience;
- iii. Expected timeline for the average participant from evaluation to installation; and
- iv. Customer service practices and communication strategies with customers.

E. Partnering and Sub-Contracting with Other Contractors (if applicable)

Bidding contractors may choose to partner or subcontract with other contractors to diversify and strengthen their bid and avoid strains in capacity.

If bidding contractor chooses to do so, it must specify the name of the company and the relationship that exists between the companies.

The partnering or subcontracting firm must meet the same threshold eligibility criteria as stated in **Section IV** of this document.

In addition, the bidding contractor must disclose the relationship and obtain approval in advance from the City.



F. Offerings for Homes Where Fixed Solar PV Is Not Feasible

The City aims to help guide participants unable or uninterested in moving forward with a fixed solar installation toward other energy-related resources, and reduced environmental footprint, such as portable solar/battery systems, home energy audits, weatherization, insulation, roofing, more efficient electrical use and appliances, and/or other clean energy products. Explain how you might be able to support this aspect of the project. This effort may include existing relationships with other energy service companies, or in-house expertise related to other energy services.

G. Unique Challenges

Identify areas or tasks that might result in delays or extensions of the anticipated program schedule.

Examples of unique challenges may include, but are not limited to: property located within a historic district, property with size challenges, etc. Please describe unique challenges perceived by the Contractor and proposed solutions.

H. Outreach and Marketing Strategy

Describe ways in which a collaborative marketing strategy between the community and the Selected Contractor can expand the number of solar projects within the community. Cite specific examples of items, marketing services that will be provided, or marketing materials that will be offered by the Selected Contractor, as well as list marketing, outreach and lead screening tasks the City and its volunteer partners can perform as part of this plan to help reduce Contractor's soft costs.

I. Pricing Structure and Financing Options

Provide additional description of proposed pricing and financing options to be offered to participants. Include existing relationships with banks or financial institutions and any other access to financing tools and products. Explain all relevant financing solutions for commercial and industrial projects. Explain all relevant financing solutions for nonprofit and tax-exempt organizations. Identify any factors or special conditions which would result in additional costs.

Tiered Pricing Schedules

- i. Residential tiered pricing.
 1. In **Attachment B**, provide a dollar per watt (\$/W) installed price for **residential solar PV systems** that will decrease by tier levels as the total amount of aggregate capacity from signed contracts increases.
 2. During the campaign period, all participants benefit from reaching the highest Tier (lowest price), regardless of when they signed a contract. Participants who sign a contract at a higher-priced tier will receive a rebate check from the Selected Contractor once the final tier is determined.
- ii. Commercial tiered pricing.



1. In **Attachment B**, provide a dollar per watt (\$/W) installed price for **commercial solar PV systems** that will decrease by tier levels as the total amount of aggregate capacity from signed contracts increases.
2. During the campaign period, all participants benefit from reaching the highest Tier (lowest price), regardless of when they signed the contract for solar. Participants who sign a contract at a higher-priced tier will receive a rebate check from the Selected Contractor once the final tier is determined.

Lease or Power Purchase Agreement (PPA) Contracts

- iii. If the Contractor opts to offer a Lease or PPA model, they must provide a base dollar per kilowatt hour (\$/kWh) Lease or PPA price (Purchase Price) that will decrease by defined tier levels as the total contracted capacity within the community increases.
- iv. The Lease or PPA contract must include a “not to exceed” lease payment or PPA payment that is applicable until the campaign concludes.
- v. This provision includes any extensions or date modifications implemented if agreed to by all campaign participants.
- vi. At the conclusion of the campaign, all participants will be notified of the final Purchase Price, based on the final pricing Tier achieved.

Increased Pricing Factors

- vii. Features of certain installations will result in higher costs. Contractor must outline specific electrical, mechanical, and structural equipment as well as site or labor features that will result in greater costs by completing the “Increased Pricing Factors” in **Attachment D**.
- viii. Throughout the campaign, the Contractor will be responsible for clearly identifying individual projects that trigger additional pricing and including this information in their proposal to participants.

Adders

- ix. Provide a list of additional system features in **Attachment D** otherwise known as “adders,” along with associated costs of such features, which may be preferred by the participant and would affect the final project cost.
- x. Examples of adders can be equipment upgrades, energy storage, home energy monitoring, etc.
- xi. Therefore respondents to this RFP are encouraged to show a tiered-pricing, group-purchasing schedule for adder materials in **Attachment D** where possible. If tiered-pricing for adder materials is not possible, please explain why.

Do not duplicate information provided in **Attachment B**.

J. Community Project



The City will seek to identify a community project for this campaign in which the Contractor is expected to contribute. Describe how the Contractor will contribute to the community project. These contributions could include: designating a percentage of the campaign gross revenues, utilizing contract workers from the Project Area, discounting installation fees, and/or providing a demonstration project on a nonprofit or municipal property. This item will be evaluated on an innovative approach and total commitment proposed by the Contractor.

K. Low- and Moderate-Income Program

For residential customers, detail experience working with Low- and Moderate-Income (LMI) customers. Include relevant existing partnerships with interested and qualified financing or other parties to assist with implementation. Include any existing capital solutions. Include relevant existing strategies to execute LMI projects. Describe any working partnerships that are in place to allow LMI customers to perform energy efficiency work in tandem with solar installations. Preference will be given to contractors that are prepared to offer energy efficiency evaluation and offer measures for customer consideration when appropriate whether it be internally or through a subcontractor as part of the Community Project.

VII. STANDARD SYSTEM SPECIFICATIONS

Use Attachment C to identify standard system specifications for equipment that will be used for program installations. Specifications listed in this section are listed with the intent of establishing a standard for baseline performance, which the City has made best efforts to outline for the purposes of pricing.

The Selected Contractor remains fully responsible to meet all applicable local, state, federal and other codes, as well as applicable industry standards and best practices. In the proposal, include a narrative describing the merits of the proposed equipment and outline a contingency plan should any equipment become unavailable, e.g., due to circumstances such as a plant closure or more demand than available product. The City is interested in high quality as well as cost-competitive equipment.

A. Photovoltaic Panels

- i. All panels must have a Tier 1 ranking as defined by Bloomberg New Energy Finance Corporation and have at least a 25 year power warranty with: specified performance degradation curve showing acceptable levels of performance or replacement and show achievement of a minimum of 80% of the nameplate rated power at STC by year 25: and PTC/STC ratio greater than 0.9, having no negative PTolerance. PTolerance may be positive or zero for both the positive and negative tolerance ratings. Independent of the mounting systems, panels must be rated for snow and wind load up to 5400 PA. Panels should have efficiencies of no less than 17%, for the base price, and for the Premium Efficiency Alternative Price, please specify a panel with substantially higher efficiency, which may be used for situations with space limitations.



B. Inverters

- i. Inverter technologies will have a warranty that allows for replacement due to premature failure over the lifetime of the system, and UL certification. Warranties shall be at minimum 15 years for microinverters, and 10 years for string inverters; however, longer warranties will be viewed favorably.

C. Racking

- i. Roof: Pre-engineered roof racking systems must be at minimum in accordance with City of Norman Building Codes.
 - a. Current adopted codes in the City of Norman include: International Building Code (2018), National Electrical Code (2020), International Residential Code (2018), International Fire Code (2015), International Mechanical Code (2015), and International Energy Conservation Code (2006).
- ii. Ground: Pre-engineered ground mount racking systems at minimum, compliance with UL 2703 or be 2703 certified.

VIII. PARTICIPANT PROPOSAL AND CONTRACT SAMPLES (Provided in a PDF file)

A. Proposal/Estimate

Sample of typical participant proposal/estimate, showing system size, project energy production, and expected financial savings. Participant proposals must clearly state all assumptions, including utility price and utility price escalator.

B. Purchase Contract

Sample of typical residential and commercial participant contracts. For the campaign, Contractors will be requested to show estimated savings to the participant gained by participation in the campaign. Include a section explaining how the final price will be adjusted for all participants when the final pricing tier is determined at the end of the campaign.

C. Lease or PPA Contract

If applicable, Contractor's direct purchase contract and/or PPA or lease agreement with the participant, specifying all terms and conditions for a participant under the campaign.

IX. GENERAL PROVISIONS

A. Indemnification

- a. Contractor will protect, indemnify and hold harmless the City, its partners, directors, officers, board, trustees, employees, volunteers, agents and/or representatives from and against all liabilities, losses, claims, damages, judgments, penalties, causes of action, costs and expenses (including, without limitation, expert and attorney fees and expenses) imposed upon, incurred by or asserted against the City resulting from, arising out of or



relating to the Contractor's work under contracts entered into as part of this campaign.

- b. The obligations of the Contractor under this paragraph will survive the expiration or termination of the Initiative program.

B. Insurance

For the duration of the campaign, the Contractor shall maintain standard insurance policies for Worker's Compensation (\$1,000,000 per accident) and Commercial General Liability (\$2,000,000 per occurrence). All coverage maintained by Contractor shall be primary to any insurance coverage carried by Participant, shall contain waivers of subrogation, and shall not be amended or terminated without notice to Participant. Proof of this coverage will be provided by the Selected Contractor.

C. Limitation of Liability

The City, its partners, affiliates, agents, officers, directors, employees, volunteers, successors and/or assigns shall not be liable to the Selected Contractor for any special, indirect, incidental, consequential, punitive, or exemplary damages of any kind whatsoever, whether based on contract, warranty, tort (including negligence or statutory liability), or otherwise.

D. Non-discrimination

The Selected Contractor agrees and warrants that they will not discriminate or permit discrimination against any person or group of persons in any manner prohibited by the laws of the City of Norman, the United States, or the State of Oklahoma.

E. Waiver Authority

The City reserves the right, at its sole discretion, to waive minor irregularities in submittal requirements, to modify the anticipated timeline, to request modifications of the proposal, to accept or reject any or all proposals received, and/or to cancel all or part of this RFP at any time prior to Contractor selection.

F. Confidentiality Statement

The City will endeavor to keep information confidential if the Contractor marks the subject information as confidential, provided that the City is required to adhere to the Oklahoma Open Records Act with respect to such information.



ATTACHMENT A: CONTRACTOR PROFILE

Contact Information		
Name of Contractor (EPC Firm)		
Address		
Contact Name		
Contact Title		
Contact Phone	(Office)	
	(Cell)	
Contact Email		
Company Website		
Contractor Profile		
Experience with residential installations		
Experience with commercial installations		
Number of years in operation		
Number of Installations	Residential	
	Commercial	
Number of installations in the City of Norman limits (specify type, size and location)		
Employee Information	# of full-time employees	
	# of part-time employees	
	Total #employees	
	# of employees located in Project Area	
	# of NABCEP Certifications (specify type)	



References		
Residential	1	
	2	
	3	
Commercial	1	
	2	
	3	

Financing Partners (specify if loan or lease/SEPA)		
Residential	1	
	2	
	3	
Commercial	1	
	2	
	3	
Licenses and Certifications		
Licenses (contractor and electrical)		
Certifications (NABCEP or otherwise)		
Other		



ATTACHMENT B: PRICING STRUCTURE

Name of Contractor:

Instructions: The total number of installed nameplate kilowatts (kW) in each tier bracket represents the total amount for all signed contracts at the end of the Initiative campaign. Do not differentiate price according to system size. Any variation in \$/W installed cost resulting from variations in system size may be defined under Attachment D. Guideline for price structure:

- As the total number of signed installation contracts increases and moves from one tier to the next, the Contractor's proposed cost per watt pricing should decrease.
- Pricing proposals should include total turnkey installation price, which includes system design, permitting, applicable materials and equipment, transportation, labor, and all equipment and workmanship warranties. The price should be independent of any tax credits or incentives available to the customers.

Residential Pricing Structure (must be aggregate bulk-purchase pricing)				
Tier		Purchase Price (per watt)	Lease/SEPA Price (if applicable) (per KWh)	
			Price	Escalator
1	≤50kW			
2	51-100kW			
3	101-150kW			
4	151-200kW			
5	201-250kW			
6	251-300kW			
7	301-350kW			
8	≥351kW+			
Commercial Pricing Structure* (may be aggregate bulk-purchase or flat system size pricing)				
Tier		Purchase Price (per watt)	Lease/SEPA Price (if applicable) (per KWh)	
			Price	Escalator
1	≤50kW			
2	51-100kW			
3	101-150kW			
4	151-200kW			
5	201-250kW			
6	251-300kW			
7	301-350kW			
8	≥351kW+			

*please indicate whether commercial project capacity will apply to residential capacity for tier pricing.



ATTACHMENT C: EQUIPMENT SPECIFICATIONS

Name of Contractor:

Instructions: Information provided on this worksheet pertains to the standard equipment that will be offered with the Tier Pricing Proposal. (Equipment or procedures that will add to the price of the standard tiered pricing should be included on Attachment D).

Standard PV System Equipment*		
Modules	Brand	
	Wattage	
	Efficiency	
	Production Warranty	
	Equipment Warranty	
	Country of Origin	
Microinverters and/or Optimizer	Brand	
	Wattage	
	Voltage	
	Warranty	
	Country of Origin	
	Brand	
String Inverters	Brand	
	Wattage	
	Voltage	
	Warranty	
	Country of Origin	
Racking	Roof	
	Ground	
Monitoring System		
Other Equipment Options (specify)		
Other Equipment Options (specify)		
Other Equipment Options (specify)		

*If needed, provide any additional information on a separate piece of paper.



ATTACHMENT D: ADDITIONAL COST FACTORS AND PRICE ADDERS

Name of Contractor:

Instructions for Additional Cost Factors: In this section, outline any Additional Cost Factors and Price Adders that may increase the base pricing proposal in **Attachment B**. Additional Cost Factors include costs from the Contractor excluding any potential costs related to services already provided by the Contractor (e.g. tree removal, additional electrical work, or structural reinforcement of rafters). If an Additional Cost Factor involving a service not provided by the Contractor is listed in the table below, please note this under “description of work” and leave cost fields blank. For factors involving additional costs from the Contractor, please indicate increased cost as \$/W or \$/kWh wherever possible. A flat cost is also acceptable if appropriate. If a cost estimate is impractical, please briefly indicate why and provide an estimated range of total added cost. If needed, provide any additional information on a separate piece of paper.

Additional Cost Factors*		For Purchase: Increased Cost (per/watt)	For Lease/SEPA: Increased Cost (per/kWh)	Flat Rate	Description
Roof	Standing seam				
	Ballast mount				
	Other				
	Other				
Roof Slope					
Roof Height					
Structural Review					
Ground Mount					
Car Canopy/Shade Structure					
Electrical	Panel Upgrade				
	Sub-panel				
	Meter upgrade/change				
	Conduit				
	DC Disconnect				



Additional Cost Factors*	For Purchase: Increased Cost (per/watt)	For Lease/SEPA: Increased Cost (per/kWh)	Flat Rate	Description
Other (i.e. tree removal, structural reinforcement, etc.)				

* Please use additional sheet for more Additional Cost Factors if needed.

Instructions for Price Adders: Outline below any Price Adders offered by the Contractor no included in the base pricing proposal in **Attachment B**. Price Adders include extras and options from the Contractor excluding any potential costs related to services already provided by the Contractor (e.g. equipment upgrades, battery storage, EVSE, etc.). If a Price Adder involving a service not offered by the Contractor is listed in the table below, please note this under “description of work” and leave cost fields blank. Represent Price Adders that can be calculated as \$/W or \$/kWh wherever possible. A flat fee Price Adder is also acceptable if appropriate. If a Price Adder amount is impractical, please briefly indicate why and provide an estimated range of total cost.

Price Adders*		For Purchase: Increased Cost (per/watt)	For Lease/SEPA: Increased Cost (per/kWh)	Flat Rate	Description
Equipment Upgrades	Panels				
	Inverters				
	Racking				
	Other				
Battery Storage					
Electric Vehicle Charging Station					
Energy Management					
Other					
Other					
Energy Efficiency Upgrades	LED Lighting				
	Weatherizing				
	Thermostat Upgrade				



Price Adders*		For Purchase: Increased Cost (per/watt)	For Lease/SEPA: Increased Cost (per/kWh)	Flat Rate	Description
	Other				
	Other				
Other Adders					

* Please use additional sheet for more Adders if needed.

Price Adder equipment (i.e., battery storage):		
Tier (# of units, kW, or other)		Purchase Price
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		

Optional: Tiered pricing for Price Adders. The City encourages leveraging group-purchasing and economies of scale to reduce the cost of Price Adders. The below tables allow for the tiered-pricing of Price Adder materials including but not limited to battery storage and EVSEs. If the bulk-purchase of Price Adder materials is possible, please complete the table below by naming the equipment, the quantifying metric, and the purchase price per price tier. Use your own discretion to complete the number of tiers possible.



Price Adder equipment (i.e., battery storage):		
Tier (# of units, kW, or other)		Purchase Price
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		