

REQUEST FOR PROPOSALS

**REQUEST FOR PROPOSALS
FOR
SOLAR PHOTOVOLTAIC PROJECT**

Issued by: San Francisco Friends School

**April 16, 15
Responses due by: 3:00 p.m. on May 13, 2015**

**To: Paul Galvin
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solar@sffriendsschool.org**

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PROJECT INFORMATION

1. PROJECT BACKGROUND AND INSTRUCTIONS

It is the goal of the San Francisco Friends School (hereinafter referred to as “School”) to pursue sustainability projects, such as distributed renewable energy installations and energy efficiency improvements that reduce electricity bills and greenhouse gas emissions from school operations. This strategy improves the local environment while creating new economic activity.

The School understands that photovoltaic (PV) installations can lower facility reliance on utility-generated electricity and reduce the carbon footprint of their operations, while providing environmental leadership for the community. The primary purpose of this Request for Proposals (“RFP”) is to identify qualified providers/developers of solar installations to support the School in identifying and developing a desirable, cost-effective renewable energy project at the educational institution.

The scope of this RFP is to identify qualified providers of solar power for the School via on-site generation of solar PV systems (“Systems”). The School is seeking the best value for the direct purchase of an on-site System, but may consider alternative financing options if cost effective and appropriate. The potential installed capacity for solar generation at this site has been estimated to be 72 kW-DC by independent energy consultants.

The School seeks proposals from qualified Proposers for the design, procurement of materials, installation, and all associated documentation, financing (if applicable), maintenance and warranties of Solar PV Systems to be located at the School. It is anticipated that the School will purchase the System outright within the scope of this project. In relation to this RFP, the term “Proposer” shall refer to all organizational members of the respondent team that will, through combined efforts and abilities perform all aspects of solar site development.

Independent energy consultants provided key site information and potential installed capacity, which is summarized in Attachment A: Site Specification Sheet. The School’s historical energy usage data is provided in Attachment B for Proposers to evaluate. The School has strived to ensure that documents and information included in the RFP are accurate and complete, but errors and omissions may have occurred. The School makes no representations with respect to the sites, including their suitability. Proposers take full and sole responsibility for conducting any necessary due diligence in assessing the site and its conditions in order to develop proposals.

Proposers must provide a pricing proposal for Direct Purchase with School ownership of PV systems. The pricing proposals must be submitted using the Attachment D form, which includes input cells for direct purchase and operations and maintenance costs.

Technical requirements: Proposers must comply with all technical requirements as specified in Attachment C and are expected to utilize industry best practices in responding to this RFP and in performing their responsibilities under a contract with the School. Proposed pricing must reflect conformance with all technical requirements in Attachment C, and must also address foreseeable construction considerations,

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including those identified in Attachment A and on the optional site walk. Proposers will be required to acquire a Building Permit and, where applicable, a local business license, before starting construction. Proposers will also be responsible for applying for GoSolarSF rebates, a municipal-provided incentive, on behalf of the solar project (<http://www.sfwater.org/index.aspx?page=133>).

All PV equipment installed must meet the Warranty, Performance and Permanency Requirements outlined in Section 2.5 in the GoSolarSF Handbook (<http://www.sfwater.org/modules/showdocument.aspx?documentid=5698>).

Insurance requirements: Proposers must provide certificates of insurance describing general liability coverage limits of at least \$1 million per occurrence and \$2 million in aggregate, and Workers' Compensation insurance with a coverage limit of at least \$1 million.

Pricing and assumptions: In addition to requirements as specified in this RFP and Attachments, Proposers should use the following assumptions when providing pricing and project cash flow analysis (as required in Section 6 of the proposal):

1. Utility escalations rates set at 4%
2. Electricity rate schedules may be changed for optimal savings, but only if a facility is eligible for recommended change
3. Assume construction start date of 7/07/15, and construction completion date of 08/14/15 for pricing calculations
4. Assume GoSolarSF rebates for non-profit organizations, which will be maintained by the Proposer (<http://www.sfwater.org/index.aspx?page=133>), but no California Solar Initiative (CSI) rebates
5. Pricing must include complete design and construction of the proposed systems, with operations and maintenance (O&M) included as a separate line item for direct purchase proposals. Design shall include all aspects, including, but not limited to, structural investigation, electrical modification, and aesthetics of proposed systems.

Contract Negotiations: Proposers submitting responses to this RFP do so with the understanding that the School does not guarantee the award of any contract or work. The School reserves the right, in its sole and absolute discretion, to abolish, refresh, amend, or extend the scope or limitations of this Project.

2. RFP PROCESS AND INFORMATION

The RFP documents, including an addendum (if necessary), will be posted on the School website, http://newmedia.sffriendsschool.org/~support/SFFS_solar_rfp.html. To request information or be notified of the posting an addendum, please contact Paul Galvin at the SF Friends School **via e-mail only** at solar@sffriendsschool.org. Please include in your request: *Company Name, Contact Person, Mailing Address, Valid E-mail Address, and Telephone Number.*

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Timeline: Following is the RFP selection process timetable, subject to change at the School's sole discretion:

04/16/15: Request for Proposals Issued
04/29/15: Optional Site Walk @ 9:00am
05/01/15: Deadline for Proposer Submittal of Questions
05/06/15: Addendum Issued, if necessary
05/13/15: Deadline for Submittal of Proposals
05/20/15: Vendor Interviews
05/22/15: Select Vendor for Negotiation
05/25/15: Start Contract Negotiations
06/05/15: Contract Presented for Approval

RFP Due Date: The School shall receive, no later than **3:00 p.m. on 5/13/2015**, a digital copy of the completed submittal documents in PDF format except for Attachment D, which shall be submitted in Excel format. This can be sent in one of two ways:

- (1) Email to Paul at **solar@sffriendsschool.org** as an attachment or a link to download from a cloud server (like Google Drive, Box, Dropbox, etc.), or
- (2) Send a sealed envelope with one (1) electronic CD/DVD/flash drive copy to:
Paul Galvin, Director of Finance and Operations
San Francisco Friends School
250 Valencia Street
San Francisco, CA 94103

Where noted, all responses shall utilize forms provided in this RFP.

Requests for Information: Proposers may submit requests for information regarding this RFP only via e-mail to **solar@sffriendsschool.org**, up to 5:00 p.m. on 5/1/15. All questions and Requests for Information will be addressed, and responses will be issued via an Addendum, which will be posted to the School's website. All parties interested in receiving email notification of new postings to the website should email contact information to **solar@sffriendsschool.org**. Any attempt by a Proposer to contact any other School staff member in regards to this RFP may result in disqualification of the Proposer.

Proposal Interviews: Between 5/20/15 and 5/22/15, the Selection Committee may conduct individual interviews with selected Proposers. Those Proposers will comprise a short-list of preferred vendors, and will be notified of the time and exact location in advance of the interview. The Selection Committee shall be composed of School staff and technical advisers. This Committee will evaluate all proposals, and members of the Committee will conduct Proposer interviews.

The purpose of this interview is to confirm information provided in proposals submitted by the Proposers, and to allow Proposers to respond to Selection Committee questions and to provide clarifications and expand on the information provided in their proposals. Each Proposer shall have their proposed key

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personnel assigned to the project present as the primary representatives during this process. Presentation materials typically include Electronic Media (PowerPoint) and supporting materials.

Upon completion of interviews and proposal evaluations, a preferred vendor will be selected, and contract negotiations will begin. If the selected Proposer is unable to effectively execute a contract with the School, other Proposers may be contacted in an effort to develop the proposed projects.

Award: Any contract for this Project will be awarded to the qualified Proposer able to effectively negotiate terms for the project that provides the “best value” for the School, as determined solely by the School and its agents. The Selection Committee, on behalf of the School, reserves the right to reject any or all proposals or to waive any irregularity in any proposal and to determine which, in its sole judgment, best meets the goals of this RFP.

Confidentiality: If proprietary information is contained in documents or information submitted to the School, Proposer must clearly mark such information “Confidential and Proprietary”, and identify the specific lines containing the information. The School reserves the right to withhold information that would reveal the number of proposals submitted or the identities of the Proposers, as well as copies of all proposal documents, until after negotiations are completed.

Criminal Background Check: Proposers must supply an affidavit verifying that its employees, agents and representatives have not been criminally convicted of a violent felony within the last 7 years, nor have been convicted of any crimes against minors at any time in the past. If proposers are unable to provide an affidavit asserting the above, then proposer shall, upon being awarded the direct purchase contract, agree that all of the proposer’s employees, agents and representatives who visit the job site must submit to a State of California Dept. of Justice criminal background check verifying the above requirements, and must do so before such personnel can be permitted on the job site.

Other Requirements: Proposer and any subcontractors shall comply with all federal, state and local laws and regulations applicable to the performance of the work hereunder, including but not limited to, the California Building Code, local building codes, utility interconnection regulations, the Americans with Disabilities Act, and any copyright, patent or trademark law. Proposer’s Failure to comply with any law(s) or regulation(s) applicable to the performance of the work hereunder shall constitute a breach of contract.

The RFP specifications, terms, conditions, Attachments, Addendum, and Proposer’s proposal may all be incorporated into and made a part of any contract that may be awarded as a result of this RFP.

3. SUBMITTAL REQUIREMENTS

Each Proposer must conform with and be responsive to the submittals required by the School. Any deviation from the standard application forms (where applicable) or failure to provide the required information will be considered non-responsive and grounds for rejection of the proposal. The Selection Committee, on behalf of the School, may reject any or all proposals or to waive any irregularities in any responses received, at its sole discretion. Submittals for past projects with the School are not applicable.

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Format for proposal submittals must follow the structure as shown below:

Section 1. Executive summary. This section includes a high-level description of the project management approach, proposed PV system, financing methods, professional background of company and project team, and description of relevant experience with equivalent projects.

Section 2. Preliminary system designs. This section must adhere to the design specifications in Attachment C, and include:

- Site overview with module layout, including proposed azimuth and tilt
- Preliminary Single-line electrical diagram
- Product spec sheets for proposed racking, modules, inverters, and monitoring
- Product warranty information for proposed racking, modules, and inverter.

Section 3. Pricing proposal and production. Proposal includes direct purchase pricing of Systems, which includes 10-year inverter warranties. This pricing must be submitted in the Attachment D spreadsheet. Pricing for 20-year Operations and Maintenance shall be included as a separate line item, which will be evaluated separately from the direct purchase price. Pricing must include all aspects of providing a turn-key PV system and must address the requirements in Attachment C and foreseeable contracting and site conditions, including, but not limited to, those identified in Attachments A, site walks, and RFP Addendum. Attachment D also requires the input and submittal of proposed system components and projected solar generation, which must match production detailed in submitted CSI EPBB calculator models, as described in Section 5 below.

Section 4. Alternative financing option(s) (optional). Included alternative financing should include terms and conditions, and indicate costs and benefits to the School. If not applicable, submit a proposal page stating “Not Applicable”.

Section 5. First-year system production estimates. Estimates should be made in accordance with CSI EPBB calculator outputs (available online at <http://www.csi-epbb.com/default.aspx>). Production estimates shall accurately reflect location and proposed system specifications (components, azimuth, tilt, under-module clearance, etc.). Production estimates detailed in these calculator outputs must match and be used for completing Attachment D, as noted in Section 3 above.

Section 6. Financial analysis. Analysis should demonstrate the impact of proposed PV development based on current facility electricity bills and/or cash flows for all proposed financing methods. See Attachment B for historical energy usage information. See “Pricing and Assumptions” on Page 4 of this RFP for additional information for developing a pro forma financial analysis.

Section 7. Alternative energy solutions (if applicable). Technologies other than or in addition to systems complying with specifications of Attachment C should be included in this section. If not applicable, submit a proposal page stating “Not Applicable”.

Section 8. Proposed construction schedule. Schedule should assume a Notice to Proceed issuance on 7/7/15. If included as a Gantt chart, the schedule must also be submitted electronically as a PDF file.

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Section 9. Relevant project experience. Describe the experience of organizational team members and key personnel, during their time at the current firm. Description of the Development Team structure, including member firm addresses, contacts, and roles in the proposed project. Please highlight any previous experience working with private schools within the City of San Francisco.

Section 10. Project references. Minimum of five (5) references for successfully completed projects of similar size and scope. If applicable, please include any projects completed on other private schools, particularly those within the City of San Francisco. Note that the School or its agents will contact some or all of the provided references.

Section 11. Proof of valid contractors license. Only Proposers with proof of valid and current California B, C-10 and/or C-46 Contractors license and who have been approved through this process will be eligible to contract for the Project. Only installers who have been certified through the GoSolarSF program will be eligible, or are otherwise eligible to apply for the GoSolarSF rebate.

Section 12. Criminal background affidavit. Proposers must supply a signed affidavit or an agreement for the School to conduct criminal background checks on employees, agents and representatives prior to visiting the job site. This must meet the requirements in "Criminal Background Check" in Section 2 of the RFP (Page 6).

Section 13. Installer safety record and plan. Installer safety record; claims history and judgments; and worker's compensation experience modification rating from the past 3 years, and safety plan for this project.

Section 14. Certificates of insurance. Proposers must provide proof of valid general liability and worker's compensation insurance that meets the specifications in Section 1 of the RFP (Page 6).

Section 15. Template purchase contract. Also include any related required contractual documents.

Section 16. Response checklist. Complete Attachment E in the RFP to assure application completion.

Section 17. Additional supporting documents. Provide documents and financial information that can help the Selection Committee evaluate Proposer qualifications more accurately. Documents inserted here may include: indications of Proposer and partner firms' financial strength; indications of proposed component manufacturers' strength; explanations of judgments and pending lawsuits against the Proposer and partner firms; and any other documentation needed to clarify or augment the proposal.

Cost of Proposal Development: The School shall not bear any financial responsibility for costs incurred by the Proposer in responding to this RFP or any subsequent proposal, whether or not the Proposer's proposal is successful, including the costs for bonding, legal costs for any reason, visitation costs, reproduction, postage/mailing and other related costs.

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4. EVALUATION OF SUBMITTALS

Requirements for Qualifications: The RFP evaluation is solely for the purpose of determining which contractors are deemed responsible, qualified, and able to offer the best value to the School. Qualifications of applicants will be reviewed and determined by the School based upon the submitted documents and any other information available to them. Applicants may be asked to submit additional information pertinent to the Projects, or to be present for an interview. The School also reserves the right to investigate and rely upon information from other available sources in addition to any documents or information submitted by the Proposer.

The School Selection Committee retains the sole discretion to determine issues of compliance and to determine whether a Proposer is responsive and responsible. The School will determine a Proposer's quality, fitness and capacity to perform projects satisfactorily. Each submittal will be judged as a demonstration of the Proposer's capabilities of delivering the services requested with high quality and low total lifetime costs. Evaluation of the responses will be based on a competitive selection process, in which the evaluation of proposals will not be limited to price alone. The Selection Committee's decision will be based on the evaluation of several factors including but not limited to the following:

Proposer Qualifications & Experience (20 points)

- Strength of qualifications and experience of partner firms and key personnel
- Strength of project references in regards to customer satisfaction, completion of projects equivalent to those included in this RFP, and success in maintaining project budgets and schedules
- Financial stability and proof of funding for this project, with proven financing track record

Technical Proposal (20 points)

- Projected energy production is realistic and appropriate for each facility
- Preliminary system design is appropriate for site needs and accounts for site conditions
- Module, inverter, racking, and monitoring components are high-quality, available, and have strong track record and warranty coverage, with stable and financially strong manufacturers

Project Costs (40 points)

- Levelized cost of energy over 20-years of system life
- Direct Purchase price
- Operations & Maintenance costs over first 20-years of system life
- Financial analysis of total system costs and benefits, including possible rate schedule changes

Implementation Plan and Schedule (15 points)

- Project schedule is realistic, yet efficient (construction completed by 8/14/15)
- Proposal is complete and addresses requirements and preferences stated in the RFP

Contract Terms & Conditions (5 points)

- Template contract and documents contain terms likely to be acceptable to the School.

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The Selection Committee will develop preliminary scores, which will then be augmented for a short-list of Proposers during or after Proposer interviews. The Proposer with the highest consensus score will enter into contract negotiations with the School.

Proposers are urged to review evaluation factors listed above and tailor the response in order to provide clarity in all areas including, but not limited to, financial options and cash flow analysis, technical design, projected system production, warranties, performance guarantees, and company experience.

5. TERMS AND CONDITIONS

If there are any conflicts between the terms and conditions of the RFP and any applicable federal or local law or regulation, or any ambiguity related thereto, then the provisions of the applicable law or regulation shall control and it shall be the responsibility of the Proposer to ensure compliance.