Request for Proposals
Belmont Goes Solar group solar purchase program

October 30, 2015

This is a request for proposals from Solar PV installers in order to select a single installer to provide a fixed price (discounted) offering to Belmont residents.

1 Introduction

The community of Belmont seeks to pursue a program called Belmont Goes Solar (hereinafter "Belmont Goes Solar" or the "Program"). The Program is similar in function and scope to the Solarize Massachusetts Program offered by the Commonwealth of Massachusetts, Clean Energy Center and the Department of Energy Resources (DOER). Note: The Town of Belmont is serviced by a municipal light plant, Belmont Light, which does not contribute to the RET (Renewable Energy Trust) and therefore is not eligible to participate in the Commonwealth's Solarize Massachusetts Program. The Belmont Goes Solar Program is intended to be similar to the Solarize Mass community programs, but it is not sponsored by the Massachusetts Clean Energy Center.

The selected Installer (hereinafter the "Installer") will propose a fixed discount program for rooftop solar PV systems installed in Belmont during a specified period (the "Program Period"). The Program will be available to Belmont residents and businesses during the Program Period. The Program Period should be no shorter than four months. Belmont Goes Solar will provide a group of dedicated volunteers (hereinafter "Volunteers") to help market and publicize the Program during the Program Period. The Installer will enter into contracts with customers for the installation of solar photovoltaic systems. While the Installer will not have an exclusive right to sell solar installation services in Belmont during this or any other period, all marketing and publicity efforts by the Belmont Goes Solar Program to the community will focus on the selected Installer.

Belmont has approximately 10,000 housing units, of which around 4,500 are single family homes. The Town has recently established a new tariff for solar distributed generation. The Town's Board of Selectmen has requested the Town's Energy Committee to convene a Steering Committee to run a solar program in Belmont to encourage residents to take advantage of a group purchase program with the aim of installing solar PV systems and taking advantage of the Federal tax credit for solar PV that expires at the end of 2016. Selecting and promoting a single Installer offering a

fixed price through the Belmont Goes Solar Program is how the Steering Committee has chosen to implement this group purchase program.

Program success will build on the following factors:

- The Belmont community is very engaged with energy efficiency matters. Recent programs have engaged one in five (20%) of all homes in programs related to energy efficiency. This provides a very large group of homeowners to whom the solar program will be marketed.

- The Town is fully committed to the Belmont Goes Solar Program, with the Board of Selectmen actively supporting the Program.

- The Belmont Goes Solar Steering Committee that will drive the local marketing efforts includes representatives from the Energy Committee, Belmont Light, Sustainable Belmont and Mothers Out Front, a parent-based community group. These groups will conduct outreach efforts to all the local volunteer and faith community groups, the public and private schools and the customers of Belmont Light, amongst others.

NOTE:
This RFP is NOT being issued by or on behalf of either the Town of Belmont or Belmont Light.

2 Project Timing and Proposal Submission Details

Given the upcoming expiration of the Federal tax credit, the Belmont Goes Solar Steering Committee wishes to begin a program as soon as possible. It is anticipated that the program will launch in January 2016 and run through April 2016. An extension could be mutually agreed on depending on progress and continued interest at that time.

Proposals should be sent to Admin@BelmontGoesSolar.org, to arrive no later than 5:00 p.m., Friday, November 13, 2015. If your firm is interested in bidding but cannot meet this deadline, please request an extension by emailing Roger Colton and Ian Todreas, Co-chairs, Belmont Energy Committee, at Admin@BelmontGoesSolar.org not later than 12:00 p.m., Friday, November 6, 2015. If an extension is granted, the same extension will be granted to all bidders.

No mandatory format is being specified for responding to this RFP, although bidders are encouraged to submit brief proposals along the following lines described in Part 4 of this RFP in order to allow the Belmont Goes Solar Steering Committee to compare bidders easily.

3 Scope

The Installer selected for the Program will have primary responsibility for managing leads, performing site assessments, providing general customer service, contracting, installation, and all other functions typically associated with the sales and installation process.

The Installer will play an integral role in public outreach and educational events coordinated between the community and the Installer.

Once selected, the Installer will work with the Belmont Goes Solar Steering Committee, as well as the Community Solar Coach, to finalize a marketing strategy specific to the community. The Installer will participate in at least one “Meet the Installer” presentation, where the Installer will be introduced to the community. The Installer is encouraged to provide additional training for the Community Solar Coach and other Steering Committee members and volunteers on the Installer’s operations, technical selection criteria, and other relevant topics.

As leads are identified, the Installer will provide site assessments (as appropriate) and system designs for individual solar PV projects. The site assessment will evaluate a site’s suitability for solar PV, including shading, onsite load, and any electrical, structural, or mechanical issues that may increase the cost of the solar PV project relative to the Base Package.

In order to be eligible for the Program, residential and small-scale commercial projects must meet all of the requirements outlined in the Commonwealth Solar II Rebate Program’s Minimum Technical Requirements, except for the “Minimum Design and Estimated Production Requirements” section of the document.

Upon contracting, the Installer will be responsible for providing each customer with a turnkey service, which includes securing all local permits, **and completing the project such that it is fully operational before December 31, 2016**. In addition, the Installer will be expected to provide information regarding Belmont Light’s renewable energy

crediting tariff, the sale of SRECs, and any other federal or state incentives available for the customer.

Belmont Light has recently submitted to the state DPU a renewable energy crediting tariff and accompanying materials (Attachment A) that provides solar customers with credits against their bill for energy generated in real-time that is not used onsite and that instead flows out into the grid. All financial representations to customers must take Belmont Light's solar tariff and policies into account.

The Installer will provide to the Belmont Goes Solar Steering Committee with weekly data as requested, including but not limited to, the number of community initial interest contacts, number of site visits completed, number of feasible sites, number of signed contracts, and contracted capacity.

The Installer will be able to contract with customers through April 30, 2016. The Installer will be required to provide a final report outlining the total number of contracted customers within the community and the resulting prices that will be associated with each installation by May 31, 2016.

4 Suggested format for bids

While there are no mandatory elements to a response to this Request for Proposals, the Belmont Goes Solar Steering Committee has particular interest in the following information:

Element 1: Corporate profile. A description of your company, including sales capacity and installation crew capacity. A list of what solarize or community solar campaigns you have been involved with, the pricing structure for each of those campaigns, as well as the average sold price in those campaigns including any adders. Identify any third-party financing partner(s) that will be offered to residents, with a description of the terms for financing. Highlight relevant experience, skills and capabilities that would be used to undertake this Program. Describe your experience with installations on condos, including a description of your process for helping owners create documents for solar roof rights for condos.

Element 2: Price and Equipment Proposal. The Belmont Goes Solar Steering Committee encourages bidders to bid a fixed price "Basic System" which will not require adders in most instances. Please use the Excel spreadsheet provided as Attachment B for pricing.

Pricing should include total installation cost, which includes (but is not necessarily limited to): system design, permitting, applicable materials and equipment, transportation, labor, a stamped structural letter, and all equipment and workmanship warranties. The price should be independent of any tax credits or incentives available to the customers. Note that the community's expectation is a base price around the previous average price for solarize communities in Massachusetts. Preference will be given to proposals which minimize the use of adders and include a greater proportion of costs in the base price.

Proposed Equipment:
Identify specifications for equipment that will be used for projects going through the Program, including modules, inverters, racking, meters, and data acquisition systems (if applicable) along with manufacturer specification sheets and warranties. Only Tier 1 components may be used.

It is expected that the Installer will offer one well-known brand of solar module (panel). It is appreciated that supply constraints may mean that this brand has to be changed during the program. A string (central) inverter is expected along with online monitoring as typically offered by the inverter manufacturer. This description is intended to broadly describe the "basic system" in the Pricing Proposal attached herein.

If different system/quality options are recommended, please provide package prices for different level systems or alternatively standard price adders (per Watt or flat fee) for such upgrades.

A2 - Expected High-Use Cost Adders:
For costs that are not built into the base tier pricing, the Installer must list any cost adders that are expected to be utilized for more than 25% of contracted projects. Common cost adders may include (but are not limited to): automatic reporting to the Production Tracking System, use of micro-inverters or DC optimizer technology (if not part of base pricing), and others. Installers should note common cost adders, and clarify the expected percent of systems that a cost adder may be applied.

A3 – Other Cost Adders
It is understood that features of certain installations will result in higher costs. Installers must outline specific electrical, mechanical, structural, equipment, site, or labor features

that will result in greater costs on the *Adder Form*. In addition, Installers must identify a maximum Purchase Price associated with more complicated installations.

Element 3: Marketing and Outreach Services. Please describe the marketing services you would offer and how much money (if any) you would contribute to pay for items such as printed materials, banners, yard signs, mailing and distribution costs, and the like. Please indicate all contributions, if any, to the Belmont Goes Solar Steering Committee. Please provide a typical town information slide deck for a solarize campaign.

Optionally, please suggest any ideas for incentives or discounts for early adopters to ensure that the campaign shows successes early on.

The Installer may, but is not required, to offer financing mechanisms for customers under the Program, including loans, payment plans, or other mechanisms.

Element 4: Customer Service. Describe a plan to provide good customer service to the community, including timely lead contact, site assessments to interested customers, installation services, and SREC aggregation/brokerage. Indicate how, if at all, you will engage in a follow-up evaluation for Belmont customers regarding their experience. Provide a description of your suggestions and incentives, if any, that you can provide to help low-income homeowners participate in the Belmont Goes Solar program.

Element 5: Professional Qualifications. Identify all members of the project team, including but not limited to, partners assisting in project financing, customer service, outreach, project installations, and SREC aggregation or brokerage. Include an organization chart outlining the various key individuals and partners, with a description of each.

Identify any third-party financing partner(s) that will facilitate the Installer's ability to provide a solar loan or lease, and the duration of the existing partnership. Describe the typical terms of such financing options.

Identify any partnerships or resources you provide to your customers to facilitate the sale of their SRECs.

Element 6: Level of Effort. Describe how many people and how many hours per week you will make available for your team to conduct outreach, sales, training, site assessment, project management and installations. Define how much you will provide to

community interactions with the Steering Committee, training and community workshops.

Addendum 1: Standard Agreement Please provide a copy of the standard agreement for Purchase projects. The agreements should outline all of the terms and conditions for a customer under the Program.

Addendum 2: References. Please provide the names and contact information (telephone, email) of key contacts with whom the installer has previously worked on other solar community programs.

5 Installer and Community expectations

The community will expect the Installer to have conducted criminal background checks on all employees that will come into contact with homeowners during the program (including installation).

It is expected that installation will occur within 120 days from contract signature (or whatever time period the bidder deems appropriate), with a financial penalty if a delay beyond that time period is due to a lack of Installer installation capacity.

The Installer can expect that all homeowners interested in solar will be directed to the Installer website or call center. The Belmont Goes Solar Steering Committee and community volunteers will communicate to homeowners the benefits of using the chosen Installer rather than another installer.

6 Selection Criteria

The Installer will be chosen based on a review that will consider the following criteria.

- **Overall quality:** Overall quality of proposal and partnership potential with the corresponding community;
- **Experience**: Degree of Installer's experience and proficiency in the scope of work, including demonstrated experience in developing, designing and installing small-scale solar PV systems. In addition, experience of Installer team in solar campaigns and outreach activities;
- **Installer warranties and financial stability**: Extent of Installer warranties offered, guarantees to complete system installations by the end of 2016, and expected company stability and ability to honor the warranties and to service the equipment in the long run.

- **Marketing plan**: Ability of proposal to drive community adoption of solar PV projects;
- **Implementation capacity**: Demonstrated capacity: to provide timely, quality customer service and installations; to implement well-established mechanism for customer complaint resolution; to communicate and work in partnership with the community; and to bring sufficient resources to bear to achieve significant additional solar penetration in Belmont by December 31, 2016.
- **Equipment quality:** Panel and inverter efficiency and the extent of manufacturer's warranties will be considered. The aesthetics of installations (color of modules, cable run layout and covers, etc.) will also be considered.
- **Price structure**: Value and simplicity of the pricing proposal for Purchase Price ($/kW).

7 Questions

Questions should be directed to Roger Colton / Ian Todreas, Co-Chairs, Belmont Energy Committee, Admin@BelmontGoesSolar.org. Responses will be circulated to all bidding installers if deemed appropriate.

-- End RFP Narrative --

Attachment A: Belmont Light
Distributed Energy Tariff and Policies

BELMONT LIGHT
POWERING YOUR COMMUNITY SINCE 1898

RATE EFR
(TARIFF FOR INTERCONNECTING CUSTOMERS WITH EMISSION-FREE RENEWABLE GENERATING FACILITIES)

MDPU No. 151
Cancels Net Metering and Buyback Tariff for Emission-Free Renewable Generating Facilities Serving Customer Load Effective November 28, 2011

The Belmont Municipal Light Department (Belmont Light) sets forth in this rate the rules and regulations for a customer electing to develop an Emission Free Renewable (EFR) Generation Facility at its premises. Belmont Light will have the exclusive right to determine what mode of generation is applicable to this rate.

Applicability

Any customer in Belmont Light's service territory who elects to install an EFR Generation Facility located on the customer's property and is owned or leased by the customer for the sole purpose of serving electricity to the customer or selling a portion or all of the electric energy output of the EFR Generation Facility to Belmont Light.

Metering

Belmont Light shall furnish and install net metering capable of determining the amount of energy delivered by Belmont Light to the customer and energy (Excess Energy) delivered to the Belmont Light distribution system. The net metering requirements shall be in accordance with Belmont Light's Interconnection Standards for Emission Free Renewable Generation Facilities.

Excess Energy Rate

Belmont Light will purchase all Excess Energy metered by Belmont Light at the following rates:

From the Effective Date of this rate until December 31, 2017, Belmont Light will pay $.11/kWh for all Excess Energy delivered to Belmont Light's distribution system.

For the period after December 31, 2017, Belmont Light will pay Belmont Light's applicable Residential Rate A Generation Charge plus $.02061/kWh for all Excess Energy delivered to the Belmont Light distribution system. The Residential Rate A Generation Charge may be changed from time to time.

Billing

A customer on this rate shall be responsible for paying all their applicable monthly billing expenses. If during the billing period the customer's EFR Generation Facility produces Excess Energy, then the Excess Energy Credit will be an amount equal to the Excess Energy in kWh times the effective Excess Energy Rate. The Excess Energy credit will be applied to the customer's bill following the month the Excess Energy was generated.

Interconnection

Belmont Light has Interconnection Guidelines and Specifications for Emission Free Renewable Generating Facilities, one for installations up to 20 kW of capacity output and another for installations above 20 kW of capacity output.

Belmont Light's Interconnection Specifications, which are guidelines required for the interconnection of an EFR Generation Facility to the customer's internal electric system, must be followed and required equipment will be purchased and installed at the customer's expense. When the installation of the interconnection equipment is complete, it will be inspected and accepted by Belmont Light prior to the operation of the EFR Generation Facility.

General Terms

Service and billings under this rate are subject to Belmont Light's Terms and Conditions, which may be amended from time to time.

Bilateral Agreements

At Belmont Light's sole option, it may agree to sign a bilateral agreement with the owner of an EFR facility, which will outline the terms and conditions of the purchase and sale of all electric energy output from EFR Generation Facilities including price, term, delivery point, warranties, assignment, etc.

Sale to Other Customers

Any customer on Belmont Light's system who owns or leases an EFR Generation Facility is strictly prohibited from selling the electric energy output of the EFR Generation Facility to any customers located on Belmont Light's system.

BELMONT LIGHT
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Policy on Emission-Free Renewable Energy Facilities
Effective November 1, 2015

The following policy has been adopted by the Belmont Municipal Light Board (the "Light Board") to establish a program for the extension of credits for excess generation from emission-free renewable energy facilities installed by customers of the Belmont Municipal Light Department ("Belmont Light"). This policy was approved by the Light Board on September 30, 2015, with an effective date of November 1, 2015, and replaces Belmont Light's 2011 Net Metering and Buyback Tariff for Emission-Free Renewable Generating Facilities Serving Customer Load.

Section 1.01 Definitions

Capitalized terms used in this policy shall have the meanings set forth below.

Applicable Customer Tariff means any tariff of Belmont Light, as may be selected by the Host Customer, under which the Host Customer is entitled to receive electric service from Belmont Light.

Billing Period means the period of time set forth in Belmont Light's terms and conditions for which Belmont Light bills a Customer for its electricity consumed or estimated to have been consumed.

Buyback Credit is the amount credited to the bill of a Host Customer in accordance with the terms of this policy for a Billing Period for the Buyback kilowatt-hours ("kWh"), calculated as set forth in Section 1.06 of this policy.

Buyback kWh means the kWh of electricity generated by the EFR Facility which is fed from the EFR Facility into the system of Belmont Light in an applicable Billing Period.

Buyback Metering means the process of Belmont Light, in accordance with the terms of this policy, of measuring for any given Billing Period, (a) the electricity generated by the EFR Facility and fed into the system of Belmont Light and (b) the total electricity delivered by Belmont Light to the Host Customer.

Buyback Price means the price used in conjunction with the Buyback kWh to calculate the Buyback Credit.

Buyback Services means the process of Belmont Light, in accordance with the terms of this policy, of differentiating, with the use of Buyback Metering, between (a) the electricity delivered by Belmont Light to the Host Customer which is billable to the Host Customer under the Applicable Customer Tariff and (b) the electricity generated by the EFR Facility and fed back into the system of Belmont Light, which results in the Buyback Credit calculated pursuant to this policy and credited on the bill of the Host Customer.

Customer means any person, partnership, corporation, or any other entity, whether public or private, who obtains distribution service at a customer delivery point and who is either an

existing or a new customer of record of Belmont Light for its own electricity consumption.

EFR Facility means a plant or equipment located on the premises where a Host Customer takes electric service from Belmont Light (i) that is used to produce, manufacture, or otherwise generate electricity on the Host Customer's side of the meter for the consumption of the Host Customer at the premises and for injection into the system of Belmont Light and for no other purposes; (ii) that is not a transmission facility; (iii) that is a Solar EFR Facility; (iv) that when interconnected to the system of Belmont Light pursuant to the Interconnection Standards of Belmont Light, results in an aggregate capacity for all EFR Facilities so interconnected no greater than the EFR Facilities Aggregate Capacity Limit; and (v) has a capacity rating of 250 kW or less.

EFR Facilities Aggregate Capacity Limit means the aggregate capacity limit of all EFR Facilities interconnected to the system of Belmont Light pursuant to the Interconnection Standards and receiving buyback services under this policy, as such limit shall be set forth by Belmont Light from time to time pursuant to Section 1.06 of this policy.

Host Customer means a Customer with an EFR Facility that generates electricity on the Customer's side of the meter.

Interconnection Standards means Belmont Light's standards and/or guidelines for the interconnection of distributed generation to the system of Belmont Light as set forth from time to time in its public policies or filed tariffs, as the case may be.

Solar EFR Facility means a facility for the production of electrical energy that uses sunlight to generate electricity, is interconnected to the system of Belmont Light pursuant to the Interconnection Standards, and meets all requirements of an EFR Facility under this policy.

Section 1.02 Applicability

(a) Host Customers may own or lease an EFR Facility which meets the requirements of this policy. Ownership or lease arrangements of Host Customers shall be entered into at the sole risk of the Host Customers who will be responsible for the terms and conditions of any such arrangement. This policy applies only to Solar EFR Facilities. Other types of distributed generation facilities, except for existing distributed generators as of the effective date of this policy as set forth in (b), below, shall not be entitled to services under this policy. Sales by owners or operators of other types of distributed generation facilities to customers of Belmont Light are not permitted in the service territory of Belmont Light.

(b) Host Customers may receive service from Belmont Light under any Applicable Customer Tariff. Host Customers without demand meters shall be responsible for the Customer Charge, and Host Customers with demand meters shall be responsible for the both the Customer Charge and the Demand Charges only under the applicable tariff.

(c) The total generation of the EFR Facility which is fed back into the system of Belmont Light shall be the basis for a Buyback Credit as set forth in Section 1.06 below.

(d) Other than buyback service under this policy, this policy does not entitle the Host Customer or any different owner or operator of the EFR Facility, as the case may be, to have access to the lines, wires or any other facilities of Belmont Light for

any other purpose, including, without limitation, for the purpose of making retail or wholesale sales to any other person or entity with the use of such lines, wires or other facilities of Belmont Light.

(e) Only the accounts of the Host Customer (and if applicable, any tenants of Host Customer) at the premises where the EFR Facility is located shall be eligible to receive a Buyback Credit during the applicable periods. No other accounts of the Host Customer, nor any accounts of any other customer of Belmont Light, nor any other person or entity, shall be allocated any portion of the Host Customer's applicable credits.

(f) An EFR Facility may provide electricity for the end use of only the Host Customer (and/or the tenants of Host Customer) under the accounts of the Host Customer (and/or the tenants of Host Customer) at the premises where the EFR Facility is located. No other account of the Host Customer or any account of any other customer of Belmont Light, nor any other person or entity, may receive electricity for end use or for resale from an EFR Facility subject to this policy.

(g) Service provided by Belmont Light under this policy is also subject to Belmont Light's printed requirements and Belmont Light's Terms and Conditions – Distribution Service, each as in effect from time to time.

Section 1.03 Interconnection

Interconnection of EFR Facilities is governed by the terms of Belmont Light's Interconnection Standards and sets forth the following information for buyback services:

(a) Application procedures;

(b) Information necessary for requests;

(c) Metering and technical requirements; and

(d) Termination and suspension provisions.

The Host Customer at any time may indicate its request for Buyback Services on its application pursuant to the Interconnection Standards.

Section 1.04 Metering and Reporting of Generation

The existing Host Customer's meter must be able to record or calculate for each month (i) the electricity generated by the EFR Facility and injected into the system of Belmont Light, and (ii) total electricity delivered by Belmont Light to the Host Customer. The Host Customer's meter must also be in compliance with all other metering requirements and policies of Belmont Light in effect at the time. If the Host Customer's meter does not meet the above requirements, Belmont Light shall install, at the expense of the Host Customer, metering of a type chosen by Belmont Light; either installed by Belmont Light or by a contractor approved by Belmont Light; and paid for by the Host Customer, either in a lump sum or over time as Belmont Light may reasonably determine.

Section 1.05 Buyback: Billing for Deliveries under the Applicable Customer Tariff and Administration of Buyback Credits

1. Belmont Light shall bill a Host Customer under the Applicable Customer Tariff for all electricity delivered by Belmont Light to a Host Customer for any Billing Period.

2. Belmont Light shall calculate a Buyback Credit as set forth in Section 1.06 below, and provide the Buyback Credit only to the Host Customer's applicable account for each Billing Period for the electricity generated by the EFR Facility and fed into the system of Belmont Light, if any.

Section 1.06 Calculation of the Buyback Credit

1. For an EFR Facility, Belmont Light shall calculate for each applicable Billing Period a Buyback Credit equal to the product of the Buyback kWh and the Buyback Price.

2. For Billing Periods ending on December 31, 2017 or before, the Buyback Price shall be $0.11 per kWh.

3. For Billing Periods ending in the period January 1, 2018 to December 31, 2018, and for each calendar year thereafter, the Buyback Price in a given year shall be the sum of $0.02061 and Belmont Light's Residential Rate A Generation charge in effect on December 1st of the immediately preceding year, rounded to the nearest whole cent.

4. For any Billing Period for which Belmont Light calculates a Buyback Credit for a Host Customer, Belmont Light shall apply the Buyback Credit only to the Host Customer's applicable account. Belmont Light shall carry forward, from Billing Period to Billing Period, any remaining Buyback Credit balance. The quantity and allocation of Buyback Credits shall be limited in accordance Belmont Light's Terms and Conditions – Distribution Service, each as in effect from time to time.

Section 1.07 Determination of EFR Facilities Aggregate Capacity Limit

Belmont Light shall not process new applications after such time that the aggregate capacity of all solar distributed generation in Belmont receiving new metering or buyback services in addition to all applications previously submitted to Belmont Light under this policy exceeds 1,000 kW (one megawatt). Upon reaching the 1,000 kW limit, the Light Board will promptly assess the advisability of further EFR facilities. The Light Board may then increase the EFR Facilities Aggregate Capacity Limit at its discretion.

Section 1.08 Renewable Energy and Environmental Attributes

The provision of net metering or buyback services does not entitle Belmont Light to ownership of, or title to, the renewable energy or environmental attributes, including renewable energy certificates, associated with any electricity produced by an EFR Facility.