



REQUEST FOR PROPOSALS

Issued May 4, 2018

Proposals Due May 23, 2018

RFP Overview

This Request for Proposals ("RFP") is issued by Civic Works, Inc. For purposes of this document, the party to whom this RFP is addressed shall be referred to as "Applicant" and any materials submitted in response to this RFP shall be referred to as a "Proposal."

The purpose of this RFP is to solicit Proposals from firms interested in being selected as one of a small group of approved Residential Solar Installation Companies in partnership with Civic Works (each, an "Approved Installer"). The Approved Installers will provide solar photovoltaic (PV) systems to leads generated by Civic Works' Retrofit Baltimore program.

The contents of this RFP include: 1) this RFP Overview Document and 2) the RFP Application, to be filled out by the Applicant.

This Overview document outlines the following information:

- 1) Organizational and Program Background
Describes Civic Works, the Retrofit Baltimore Program, and the Retrofit Baltimore Solar Partnership Program
- 2) RFP Summary
Describes this RFP and its purpose
- 3) RFP Terms and Conditions
- 4) Minimum Contractor Qualifications
Requirements to be selected and remain designated as an Approved Installer
- 5) Weighted Factors
Criteria used to select Approved Installers and rank them within the pool
- 6) Program Requirements
To be agreed upon by the Approved Installer through a Memorandum of Understanding (MOU) with Civic Works
- 7) Applicant's Proposal
Formatting and delivery instructions

The RFP Application requires the Applicant to provide specific information regarding its business and qualifications.

One (1) printed or one (1) electronic copy of the Proposal shall be submitted to Amanda Belles on or before **May 23, 2018**.

1. ORGANIZATIONAL AND PROGRAM BACKGROUND

Founded in 1993, Civic Works' mission is to strengthen Baltimore's communities through education, skills development, and community service. Civic Works' Retrofit Baltimore program is growing the market for clean energy services and ensuring that the resulting job growth benefits underserved residents. The program has been recognized as a national leader in the energy efficiency industry and has successfully expanded its model into the solar industry.

Since 2011, Civic Works' Retrofit Baltimore program pioneered our business partnership model in the residential energy efficiency sector, generating over 2200 leads for home performance contractors. In 2017, Retrofit Baltimore expanded its model into the residential solar market, and now currently generates more than \$2.1 million in new revenue annually for partner companies in both focus sectors. In 2013 Civic Works received the Wintergreen Award for Green Building Leadership from the Maryland Chapter of the U.S. Green Building Council, and the Bright Light Award from the Maryland Clean Energy Center. Both awards were given in recognition of Civic Works' success in expanding access to energy efficiency services. In 2016, Civic Works' Retrofit Baltimore program was recognized with a Leadership and Service Award from the Maryland Sustainable Growth Commission, the Center of Excellence accreditation from the Corps Network, and the Standards for Excellence Seal recertification from the Maryland Association of Nonprofit Organizations.

Retrofit Baltimore recruits, educates, and qualifies all participating homeowners using its innovative community-based marketing strategy. As a trusted third-party messenger, Retrofit Baltimore is able to build trust in the benefits of solar energy and the selected Approved Solar Installers. Once participants are connected with an Approved Installer, Retrofit Baltimore supports homeowners throughout the process as solar companies sell the jobs. The program's energy advisors lend support to homeowners, which increases conversion rates and reduces the likelihood that a customer will opt out at any point during the process.

As one of the Approved Solar Installers in this program, not only will companies receive customer leads, but the companies will also have access to free worker training resources – for expanding the company's workforce and for the professional development of existing employees.

A 3-month Solar Installation Training Program — offered through Civic Works' Baltimore Center for Green Careers (BCGC) — graduates highly-qualified entry-level solar installation technicians with the skills, knowledge, and abilities to comprehensively meet the workforce needs of industry employers. Designed in collaboration with area installers, this training program aims to help solar companies lower turnover rates and realize higher levels of work quality from their new hires. The program includes customer service and professionalism, the OSHA Construction Safety certification, hands-on training in Civic Works' solar laboratory space, and 320 hours of on-the-job training (OJT). The combination of meaningful employment, a living wage, and marketable trade skills has proven powerfully successful. Since 2003, Civic Works has trained over 800 residents for careers in home weatherization, environmental remediation, and solar installation, with 80% of graduates maintaining employment for at least one year.

Retrofit Baltimore partner companies also have access to free incumbent worker training courses. Enrollment is ongoing for the next NABSEP Associate certification course. Additional trainings are to be decided, based on feedback from partner solar companies.

Civic Work is now releasing its semi-annual RFP to solicit Proposals from firms interested in being selected or maintaining designation as an Approved Solar Installer. Civic Works expects that each party will need to be reasonably flexible in making adjustments when needed, with the goal of perfecting the partnership.

Civic Works and the partner Solar Installer will work together to:

- Provide access to solar energy to homeowners throughout the Baltimore region
- Provide Baltimore City residents with access to solar employment opportunities
- Offer competitive wages that lead to a lasting career-track and high quality labor
- Drive accountability and the continuous evaluation of performance toward goals

2. RFP SUMMARY

The purpose of this RFP is to solicit Proposals from firms interested in being selected or maintaining designation as one of a small group of approved solar installers in partnership with Civic Works (each, an "Approved Installer"). The Approved Installers will provide solar PV systems to homeowners recruited by Retrofit Baltimore ("Retrofit Baltimore participants"). Each Retrofit Baltimore participant will be connected only with one Approved Installer for their solar system.

Civic Works will educate Retrofit Baltimore participants about the solar process and available federal and state incentives. Once Civic Works has qualified Retrofit Baltimore participants, determining that they are likely to purchase solar systems, Civic Works will then immediately connect the homeowner with an Approved Installer. The Approved Installers will contract directly with each Retrofit Baltimore participant and take responsibility for the complete solar adoption process. Retrofit Baltimore will continue to track the customer through the process, and will serve as an advisor and an advocate on behalf of the customer.

The Approved Installers will also have the option to participate in Civic Works On-the-Job Training Partnership Program. Approved Installers who choose not to participate will still receive leads from Retrofit Baltimore.

The Approved Installers will be required to have and maintain certain minimum qualifications and performance standards, as described herein, in order to be selected and remain designated as an Approved Installer. In addition, Civic Works will evaluate Proposals and allocate a fluid ranking system among Approved Installers within the pool, based on a number of weighted factors. The purpose of this system is a) to set a high bar for entry into the pool of Approved Installers and b) to create an internal competition between Approved Installers that encourages ongoing progress towards creating family-sustaining jobs and quality work. The allocation of leads from Retrofit Baltimore to the Approved Installers will be based on this ranking system of weighted factors.

Selection and Implementation Timeline:

- 5/4: RFP Issued
- RFP Q&A for Prospective Partner Installers (2 opportunities)
 - 5/14 at 2pm OR 5/15 at 5pm
- 5/23: Proposal Due
- 6/1: Selections Announced
- 6/4-6/8: In-person Meetings to review MOU and discuss logistics
- 6/11-12/31: Ongoing lead allocation through the end of the calendar year
- November: new RFP issued, opportunity for existing partners to update bids

3. RFP TERMS AND CONDITIONS

- a) Civic Works is not liable for any costs or expenses incurred by an Applicant, or any other person or entity, in the preparation of their Proposal.
- b) Civic Works reserves the right to reject any and all Proposals received from Applicants as a result of this RFP, as is in the best interests of Civic Works, as determined solely by Civic Works. In determining which Proposals are best, Civic Works will take into consideration the experience and qualifications of the Applicant as well as its history of providing family-sustaining jobs.
- c) This RFP may be sent as a courtesy to known interested individuals and firms. The receipt of this RFP from Civic Works in no way implies that the recipient is a qualified Applicant.
- d) The Approved Installer understands that this RFP does not create or imply a consulting or other employment relationship between Civic Works and the Approved Installer. Civic Works shall not have any liability for any action or inaction by any Retrofit Baltimore participant with respect to the Approved Installer.
- e) If it becomes necessary to revise any part of this RFP, an addendum will be provided to all respondents or Applicants who respond to the original RFP, and will be posted on the Retrofit Baltimore website – <http://retrofitbaltimore.civicworks.com/solar-installers>
- f) The Approved Installer shall be required to enter into a memorandum of understanding (“MOU”) with Civic Works in a form mutually agreed upon by Civic Works and such Applicant.
- g) Continued participation by the Approved Installer is dependent on a continued source of funding for Civic Works' Retrofit Baltimore Program, and may be withdrawn or canceled in Civic Works' sole and absolute discretion.
- h) Only companies that submit a current application for this RFP round will be considered for Approved Installer status. Civic Works will re-issue the Solar RFP semi-annually.

- i) Civic Works will strongly take into account a previous Approved Installer's track record of good performance in the Retrofit Baltimore Solar Partnership Program when deciding whether to renew its Approved Installer status in a new RFP round.
- j) Civic Works will give preference to Applicants that apply for pitched roof and flat roof leads. Pitched-roof-only applicants are still encouraged to apply and their applications will be considered in full.
- k) Civic Works will give preference to Applicants that apply for leads in all of the following counties: Baltimore City, Baltimore County, Howard County, Anne Arundel County, and Harford County. Applicants with geographic limitations are still encouraged to apply and their applications will be considered in full.

4. MINIMUM CONTRACTOR QUALIFICATIONS

An Approved Installer, at a minimum, must meet the following minimum criteria:

- Licensed by the Maryland Home Improvement Commission
- Fully insured, including commercial general liability insurance, excess or umbrella insurance, professional liability insurance, and worker's compensation insurance.
- Employ solar installer/technicians in-house (not through subcontractor or referral partnership)
- Pay wages of at least \$12/hour after the first 90 days of hire, for all non-supervisory solar installer/technicians.
- Have no history of violating any federal or state wage and hour laws, non-discrimination and equal employment opportunity laws, local building codes, or health and safety standards within the last 5 years
- In accordance with Title VII of the Civil Rights Act of 1964, shall not discriminate on the basis of race, religion, national origin, or sex. In accordance with the U.S. Equal Employment Opportunity Commission (EEOC) guidance on Title VII, the Approved Installer shall not have a blanket policy against hiring individuals who may have convictions on their record, but shall have in place a fair and equitable hiring/employment policy that takes all relevant factors into account when making employment decisions.
- Shall utilize only employees to perform work on a Retrofit Baltimore project, rather than independent Contractors, temporary workers, or any other individuals holding non-employee status. Approved Installers shall classify all workers performing work on a Retrofit Baltimore project as employees of the company and pay and/or withhold appropriate taxes, unemployment insurance, workers compensation, and other benefits as required by law.

5. WEIGHTED FACTORS

The following are the weighted factors that Civic Works will use to evaluate Proposals and allocate a ranking system among Approved Installers within the pool. The purpose of this system is to set a high bar for entry into the pool of Approved Installers and to encourage ongoing progress towards

creating family-sustaining jobs and quality work. Retrofit Baltimore participants will be referred to Approved Installers based on this system of weighted factors.

Performance Standards

	Max Points Available	Points Awarded
<p>1) Customer Service and Experience <u>Points:</u> a) Based on Retrofit Baltimore administered customer surveys and interviews of participants b) Based on Retrofit Baltimore's log of participant complaints and the satisfactory resolution of complaints within a timely fashion c) Based on compliance with Retrofit Baltimore deadlines d) If not a large enough sample size, based on online customer reviews and references, customer service staffing and company practices, and quality control procedures</p>	15	
<p>2) Conversion* Rates *A lead is defined as qualified if the roof is not immediately disqualified and the customer proceeds with a proposal consultation. *A qualified lead is defined as "converted" after the completed installation of the solar system. <u>Points:</u> a) Based on percentage of qualified Retrofit Baltimore leads that complete their solar system installations within 3 months b) If not a large enough sample size, based on track record</p>	20	
<p>3) Price and System Quality <u>Points:</u> a) Based on competitive pricing (for varied housing stock) b) Based on system quality c) Based on system warranties</p>	15	

Workforce Standards

	Max Points Available	Points Awarded
<p>1) History of employing Civic Works' Baltimore Center for Green Careers (BCGC) graduates: <u>Points:</u> a) Based on the number of full-time equivalent workers that are graduates of BCGC; partial points awarded for graduates from past BCGC classes b) Additional points for overtime hours c) Additional points for promoting BCGC graduates (i.e. crew leader,</p>	25	

<p>trainer, etc.)</p> <p>d) Additional points for providing free professional development in solar-, energy efficiency-, or construction-related areas</p>		
<p>2) Providing family-sustaining wages and benefits:</p> <p><u>Points:</u></p> <p>a) Providing family-sustaining wages to BCGC graduates above the program minimum of \$14.50 per hour after the first 90 days of hire</p> <p>b) Health insurance consisting of Major Medical/traditional plans; HMO/managed health care; PPO; or POS. "Mini-med" insurance is not included. (If employer payment is less than 100%, points are prorated by percentage of employer subsidy)</p> <p>c) Dental and vision insurance</p> <p>d) Health insurance for employee's dependents</p> <p>e) Pension or other retirement plans</p>	15	
<p>3) Status as, or subcontracting envelope improvements with, a Local* Business or Minority-, Woman-, or Veteran-Owned Business:</p> <p>*"Local Business" is a business whose principal place of business is located within or near Baltimore City.</p> <p><u>Points: pro-rated based on distance from Baltimore City</u></p>	10	

Optional

	Max Points Available	Points Awarded
<p>1) Integrating Energy Efficiency* (optional)</p> <p>*Goal: integration with Home Performance with ENERGY STAR program</p> <p><u>Points:</u></p> <p>a) Based on providing an integrated sales process, that reduces the number of separate site visits and steps in the sales process</p> <p>b) Based on providing an integrated Proposal</p> <p>c) Based on providing an integrated loan product</p>	5	
Performance Standards Total	50	
Workforce Standards Total	50	
Total	100	
Optional Bonus	5	
Possible Total	105	

6. PROGRAM REQUIREMENTS

An Approved Installer shall enter into a MOU with Civic Works, which shall include the following provisions:

Performance Standards

- a) Any staff of the Approved Installer interfacing with a Program Participant or responding to customer inquiries must be familiar with Civic Works' Retrofit Baltimore Program. The first staff member to interface with a Program Participant should introduce his/herself as an employee of the Approved Installer as well as a partner of the Retrofit Baltimore Program.
- b) Once the Approved Installer receives information regarding a new Retrofit Baltimore participant, the Approved Installer will be responsible for the complete solar process: including qualifying the roof, conducting sales visits and site assessments, engineering, issuing a Proposal, securing permits and approvals, and installation.
- c) The Approved Installer and Civic Works will work together in good faith to develop a project timeline, to be established as an addendum to the terms and conditions of the MOU with Civic Works. The Approved Installer will deliver a written Proposal to the Program Participant within the agreed upon timeframe. In the event that a Proposal is overdue, Civic Works will stop referring new participants until the overdue Proposal is delivered. If the Proposal is delivered electronically or by mail, the Approved Installer will follow-up promptly to review the reports and answer questions.
- d) The written Proposal will include, at minimum, price quotes for at least one recommended solar system option. The Approved Installer will notify Civic Works and provide an explanation of any extenuating circumstances that prohibit the inclusion of price quotes, or require the subcontracting of installations to companies outside the scope of the MOU.
- e) The Approved Installer will adhere to the standardized pricing structure, as provided in the RFP Application and established as an addendum to the terms and conditions of the MOU with Civic Works. The Approved Installer's first written Proposal will quote the base price with the minimum required adders; upgrades must be presented as optional, rather than incorporated into the original quote.
- f) The Approved Installer will honor the original pricing for at least 6 months. The Approved Installer and Civic Works will establish the exact service term in an addendum to the terms and conditions of the MOU with Civic Works. After the service term, the Approved Installer may reissue price quotes and may charge additional fees at the discretion of the Approved Installer.
- g) The Approved Installer is responsible for securing all city/county permits and interconnection approvals. The Approved Installer is also responsible for securing historic permits, HOA approvals, or other permits, as necessary.
- h) The Approved Installer is responsible for paperwork related to all federal and state incentives. The Approved Installer will allow Retrofit Baltimore participants who own their own solar system to take ownership of their SRECs and provide guidance for selling their SRECs.

- i) The Approved Installer and Civic Works will work together in good faith to develop a reporting schedule relating to the Services actually performed by the Approved Installer. The form, format, frequency, and exact schedule for such reporting will be determined by Civic Works. The Approved Installer agrees to deliver to Civic Works copies of documentation related to the Services.
- j) All Solar Data collected by the Approved Installer under the Retrofit Baltimore projects will be jointly owned by Civic Works and the Approved Installer. Civic Works and the Approved Installer will each have the right to use and exploit all of its respective rights to the Solar Data as if each were a sole owner of such data.
- k) The Approved Installer shall respond to all inquiries made by Program Participants in a timely fashion. Civic Works highly recommends responding within 24 hours (even if the answer is initially "I don't know") and within 72 hours at a maximum.
- l) The Approved Installer agrees to conduct itself in a professional manner at all times, including requiring that its staff refrain from smoking in or on a participant's property, using illicit drugs, or drinking alcohol while on the job. The jobsite should be left clean. No construction debris, personal items, or trash should be left on the premises.
- m) The Approved Installer shall agree to honor the legal terms and conditions of their own Work Contracts. The Approved Installer shall notify Civic Works if any changes are made to the terms and conditions of their own Work Contracts.
- n) The Approved Installer's and Civic Works' first responsibility is to do no harm. The Approved Installer shall employ risk and mitigation strategies to protect both participants and workers from harm, due to the presence of environmental hazards or shock and fire hazards.
- o) The Approved Installer shall follow all relevant OSHA standards (i.e. Fall Protection, Electrical Safety, Lockout/Tagout, Crane and Hoist Safety, Heat/Cold Stress, and Personal Protective Equipment). The Approved Installer shall also be prepared to design solar systems with knowledge of ongoing fire safety rules and practices (including Baltimore County and Howard County setback rules).
- p) The Approved Installer shall address any suspected hazards with a sense of urgency. If the Approved Installer creates a hazard at the home of a Program Participant, the Approved Installer is responsible for remediating the hazard at its own expense.
- q) Upon request by the Program Participant, the Approved Installer shall allow Civic Works to mediate conflicts.

Workforce Standards

- r) The Approved Installer will utilize the Civic Works Baltimore Center for Green Careers (BCGC) as the "First Source" for all new hires. "First Source" by definition means that the Approved

Installer will notify Civic Works of all new solar installer/technician job opportunities and interview candidates from BCGC's Solar Installation Training Program. Civic Works also encourages participation in a workday interview process. In the event that a hire is made from an alternative source instead, the Approved Installer will notify Civic Works.

- s) The Approved Installer shall employ qualified persons for the work required on a Retrofit Baltimore project. In accordance with Title VII of the Civil Rights Act of 1964, the Approved Installer shall not discriminate on the basis of race, religion, national origin or sex. In accordance with U.S. Equal Employment Opportunity Commission (EEOC) guidance on Title VII, the Approved Installer shall not have a blanket policy against hiring individuals who may have convictions on their record, but shall have in place a fair and equitable hiring/employment policy that takes all relevant factors into account when making employment decisions.
- t) Approved Installers shall utilize only employees to perform work on a Retrofit Baltimore project, rather than independent Contractors, temporary workers, or any other individuals holding non-employee status. Approved Installers shall classify all workers performing work on a Retrofit Baltimore project as employees of the company and pay and/or withhold appropriate taxes, unemployment insurance, workers compensation, and other benefits as required by law.
- u) The Approved Installer will pay wages of at least \$14.50 per hour for graduates of BCGC after the first 90 days of hire. Furthermore, it is the goal of this program to ensure that BCGC graduates secure long-term and sustainable employment. Civic Works encourages the Approved Installer to provide professional development opportunities.

General Provisions

- v) The Approved Installer understands and agrees that, in order to retain its designation as an Approved Installer, the qualifications required by this RFP for selection as an Approved Installer must continue to be satisfied. The Approved Installer shall agree to maintain and provide access to records to verify compliance with provisions within the Civic Works MOU.
- w) The Approved Installer shall provide contact, qualification, capacity, service and other related information, as reasonably requested by Civic Works.
- x) For each signed contract by a Retrofit Baltimore participant, the Approved Installer will pay Civic Works a referral fee in accordance with the following (Civic Works will not collect payment until the Approved Installer has received full payment from the customer):

Type of Roof Solar System is Installed On	Referral Fee
Flat Roof	\$0.08 per Watt
Pitched Roof	\$0.15 per Watt

- y) Any Party may without cause terminate this partnership with immediate written notice provided to the other Party. In the event that Civic Works terminates the MOU, Civic Works will

notify the contractor in writing and may choose to transfer Retrofit Baltimore projects to an alternative Approved Installer.

- z) If the Approved Installer violates a term of the MOU, Civic Works may at its sole discretion choose to terminate the MOU or designate a probationary period for the Approved Installer in lieu of termination. The criteria Civic Works may use in making this decision include, but are not limited to: the severity of the violation, whether the violation put the homeowner's safety or health at risk, whether the contractor broke any laws, the extent to which the Approved Installer quickly took responsibility for the violation, and, if appropriate, the extent to which the Approved Installer worked to swiftly resolve the violation at its own expense. Civic Works will reinstate the Approved Contractor if it determines that the Approved Installer has identified the root causes of the MOU violation and has satisfactorily corrected its internal systems to ensure future compliance.
- aa) To drive accountability and the continuous evaluation of performance toward goals, the Approved Installer and Civic Works will:
- On a monthly basis, review the Approved Installers' ranking overall and within each weighted factor.
 - On a semi-annual basis, reconvene in-person to reflect on the Approved Installer-Civic Works partnership and identify plans for improvement.

7. APPLICANT'S PROPOSAL

Required Materials. The Applicant must include the following information in the Proposal:

- a) Fill out the Application attached. The Proposal shall include all of the required information indicated in the Application. Failure to submit all required information may result in a request for prompt submission of missing information, a less favorable evaluation of the Proposal, or rejection of the Proposal.
- b) Submit copies of relevant documents (as listed in the Application).
- c) Signed Copy of these RFP Terms and Conditions.

Format. The Proposal shall satisfy the following formatting requirements:

- The Proposal should be organized in the order in which the requirements are presented in the attached Application and should clearly indicate the section that is being addressed.
- The Proposal shall include all of the required information indicated on the attached Application.
- Any additional information may be included in the Proposal and will be considered.

Delivery Requirements. One (1) printed OR one (1) electronic copy of the Proposal shall be submitted to Amanda Belles on or before **May 23, 2018**, at the following addresses:

Electronic: abelles@retrofitbaltimore.org

Printed: Attn: Amanda Belles, Contractor Partnerships Coordinator
6260 Frankford Avenue, Baltimore, MD 21206

All correspondence should be marked "Retrofit Baltimore Solar Installer Application" in the subject line or on the envelope, as applicable.