



BAY AREA SUNSHARES - REQUEST FOR PROPOSALS FOR THE INSTALLATION OF RESIDENTIAL SOLAR ENERGY SYSTEMS

The Bay Area SunShares Program is administered by Community Initiatives, a California nonprofit corporation recognized as exempt under Internal Revenue Code Section 501(c)(3) (“Community Initiatives”), through its fiscally sponsored program, Business Council on Climate Change (referred to as “Business Council on Climate Change” or “BC3”). Business Council on Climate Change is seeking qualified firms (“Installer”), on behalf of its Bay Area SunShares Program (“SunShares” or the “Program”), to submit proposals for the design, procurement and installation of residential solar photovoltaic (“PV”) systems based upon the scope of work contained in this Request for Proposals (“RFP”). BC3 is looking forward to working with qualified Installers to increase outreach, education, and adoption of solar photovoltaic (“PV”) systems within the San Francisco Bay metro area and outlying counties (“Program Area”) in order to reduce greenhouse gas emissions and protect and preserve the environment.

BC3 seeks proposals from Installers that can provide competitive pricing through a group procurement model for direct ownership using various financing options including but not limited to, cash and loans, Property Assessed Clean Energy (“PACE”), and / or a leasing or power purchase agreement (“Lease / PPA”) model for residential PV systems.

The intent is to select one or more qualified Installer(s) to provide services to Program participants across the Program area (see Section 2.2). Installers shall submit proposals for the geographic Program area in which they are willing to provide services to Program participants.

BC3 will administer the program, managing the RFP process and coordinating with an independent volunteer employee evaluation committee to review proposals and select the Installer(s). Quality of the proposal, experience, proposed equipment, installation practices, and proposed pricing will all be factors in the selection process.

The contents of this RFP are strictly confidential and may only be used for the purpose of this RFP. None of the data or information contained in this RFP shall be disclosed, duplicated, or used in whole or in part for any purpose other than to evaluate proposals or select winning Installers.

1. BACKGROUND

Through council-adopted climate action plans, as well as corporate social responsibility initiatives, municipalities and private sector employers are pursuing diverse strategies to meet energy and greenhouse reduction goals. One of these strategies includes offering residents, through their employers or local



government agencies, the opportunity to participate in a solar group procurement program (“SunShares”). SunShares programs have historically been successful in driving down system soft costs by aggregating purchasing power and simplifying the process of adoption across an organization or community in order to reduce greenhouse gas emissions and protect and preserve the environment.

Since 2016, BC3 has administered the Bay Area SunShares Program and brought together previously separate East Bay, Peninsula, and BC3 SunShares communities into a single, Bay Area-wide Program. Roughly 4,800 Bay Area residents signed up for the Program, resulting in 2.5 Megawatts of newly installed residential solar capacity.

The program is open to any individual who lives in one of the nine Bay Area Counties (Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma) or Yolo or Sacramento counties.

The following communities have confirmed their willingness and ability to participate in and conduct outreach about the SunShares program:

Antioch, Berkeley, Burlingame, County of San Mateo, Daly City, Dublin, Emeryville, Foster City, Fremont, Lafayette, Oakland, Palo Alto, Redwood City, San Mateo, City and County of San Francisco and Walnut Creek.

The following private employers and non-profit organizations have confirmed their willingness and ability to conduct outreach about the SunShares program to their employees and/or members:

Arup (700 employees), Autodesk (2,450), Genentech (13,000), Google (23,000), LinkedIn (13,000), Salesforce (6,000), UCSF (27,000), VMware (5,000), Webcor Builders (2,500), Workday (2,600).

Individuals will participate in the Program in their own individual and personal capacities, not as employees or members of any company or organization, and with no endorsement, explicit or implicit, from their employers or organizations.

1.1 Program Description

SunShares is a residential solar photovoltaic group purchasing program that aims to lower acquisition costs for residential rooftop installations. At its core, SunShares combines four main components:

A. Discounted Pricing: Pre-negotiated group discounts which increase as more people sign up within a target community (i.e., bulk purchasing—the more people that go solar under a SunShares campaign, the



lower the price for everyone in the community that participates).

B. Community-Driven Outreach: Each stakeholder organization creates a specific plan to conduct outreach which may include but is not limited to social media, e-mails, flyers, workshops, presentations, and other methods.

C. Competitively-Selected Installer(s): Through a competitive bidding process, independent volunteers from participating employers and organizations impartially elected to an evaluation committee select Installer(s) to service the area throughout the duration of the SunShares Program.

D. Limited Time Offer: SunShares campaigns are limited time offers. This motivates homeowners to act promptly, or risk missing the window of opportunity to install solar PV at a reduced rate.

The basic cost savings from the Program results from a coordinated education, promotion, and outreach effort and from the tiered pricing arrangement which takes advantage of economies of scale. These savings ultimately are passed along to the homeowners that choose to register to participate in the SunShares Program.

By educating the local community, streamlining marketing efforts, and aggregating sales, the SunShares Program will help make solar PV a more accessible and affordable energy option in order to reduce greenhouse gas emissions and protect and preserve the environment. The Program will begin August 1, 2019 with the initial launch of outreach and will remain open through November 15, 2019. The Program timeline may be changed if agreed upon by BC3 and the selected Installer(s).

1.2 Program Roles and Responsibilities

1.2.1 Business Council on Climate Change

BC3 will act as the SunShares Program Administrator. Specifically, BC3 will:

- Manage the administration of the Program, including the RFP process, proposal evaluation with a voluntary, independent employee evaluation committee and contract negotiations with the selected Installer.
- Support all outreach stakeholder organizations participating in SunShares with outreach and education materials to engage and educate participants about how the Program operates and the goal of reducing greenhouse gas emissions and protecting and preserving the environment.
- Encourage participation and manage Program tracking via a comprehensive webpage. BC3 will manage participant registration via the Program website. Participant specific data will be provided to the selected Installer(s) for use in contacting Program participants and scheduling no cost / obligation consultations.



- Convene bi-weekly conference calls between BC3 and the Installer(s) to coordinate 1) outreach and education activities and 2) Program status updates.

Indemnification

To the fullest extent allowed by law, the Installer shall indemnify, defend, and hold harmless Community Initiatives, acting here through its internal BC3 program, and its officers, directors, members, managers, employees, volunteers, attorneys, agents, representatives, successors, and permitted assigns (collectively, "CI Covered Persons") from and against any and all liability, loss, claims, damages, fines, penalties, costs and expenses (including reasonable attorney's fees), judgments and awards related to or arising out of the Program (collectively, "Damages") sustained, incurred or suffered by or imposed upon any CI Covered Person resulting from any third party claim alleging (i) any act or omission that would constitute a breach of any of the terms of this Agreement or any false representation by the Installer, or (ii) any negligent acts or omissions or reckless or intentional misconduct of the Installer, and/or its officers, directors, members, managers, employees, volunteers, attorneys, agents, and/or representatives (collectively, "Installer Covered Persons"). If Community Initiatives seeks indemnification pursuant to this Section, it shall provide detailed written notice to Installer promptly after learning of the claim, but the failure to so notify Installer shall not relieve Installer of any liability except to the extent it is materially and actually prejudiced by any delay in such notice. Installer shall assume, at its sole cost and expense, the defense of any claims asserting or seeking Damages with counsel reasonably satisfactory to Community Initiatives; provided, however, that Community Initiatives shall have the right to assume control of the defense and settlement of the claim in its discretion, and Installer shall provide reasonable assistance at Installer's reasonable expense. Community Initiatives shall not be subject to any liability for any settlement made without its consent. Installer shall not, without Community Initiative's consent, effect any settlement or discharge or consent to the entry of any judgment.

1.2.2 Participating Stakeholder Outreach Organizations

Each of the participating stakeholder outreach organizations (employers, organizations or local government agencies) will work with BC3 to create a communications plan to explain the Program to their workforce, or members or residents. While SunShares is being offered to the employees or members or residents of stakeholder outreach organizations, these entities do not and should not be construed in any manner as endorsing any specific Installer whether selected or not by the independent evaluation committee. Any employee, member or resident who enters into the SunShares Program does so in his/her personal capacity and at his/her own risk and will expressly hold each of the participating organizations harmless from any liability associated with his/her decision to participate in this Program for services for his/her project.



1.2.3 Installer

In order to participate in the Program, the Installer must provide a competitive dollar per watt (\$/watt) “Purchase Price” for solar PV systems as well as financing options including a lease / PPA, loans, and /or PACE. In addition, Installers are encouraged to offer an incentive rebate for each participant who completes an installation. As such, proposals will not only be evaluated on the Installer’s ability to provide the highest quality design and installation services, but also on the ability to deliver competitively discounted pricing with incentive rebates for the purchase and financing of systems.

Please note: While PACE financing through SunShares should be offered as an option in homeowner proposals, registrants participating in SunShares are not required to use PACE financing to complete their projects.

The selected Installer(s) will provide no cost / obligation site assessments, with site visits or desktop analysis, as appropriate, different ownership (or financing) models, and installation services to Program participants. Program participants with sites that are deemed feasible for a solar PV project will have the option to contract with the selected Installer before the program deadline of December 31, 2019. The Installer(s) will be the technical expert responsible for assessing individual sites, working with interested Program participants to design appropriate systems, and contracting with Program participants for installation of solar PV systems.

The selected Installer(s) will be required to contract with BC3 to participate. It is essential, in order to meet the program goals and timelines, that the Installer(s) is prepared to execute a contract with BC3 soon after their selection. Therefore, each applicant Installer must review the Terms and Conditions outlined in the Community Initiatives and BC3-Installer Contract Agreement (Exhibit D) and identify proposed changes on those Terms and Conditions at the time of application or entering into the contract.

BC3’s facilitation of an Installer proposal pursuant to this RFP should not be interpreted to mean that BC3 will accept any or all suggested revisions which may be requested during contract negotiations. BC3 anticipates that the term of the contract with the selected Installer will commence June 2019 and continue for one year, to accommodate all installations contracted through the program.

BC3 recognizes that this large-scale discount purchase model may generate a great deal of demand. In order to meet this potential demand, the RFP encourages Installers to co-apply as needed and submit one joint proposal based on this partnership with an agreed upon price and service delivery model. Installers may determine their preferred method of allocating or sharing program leads, whether via geographic distribution, alternating allocation, etc.

2. PROJECT SPECIFICATIONS



2.1 Program Timeline

RFP Announced	April 10, 2019
RFP Questions due in Writing	April 17, 5:00PM PST, 2019
Response to Questions (Addendum to RFP)	April 22, 5:00PM PST 2019
Proposals Due	May 10, 5:00PM PST, 2019
Installer(s) Selected	May 31, 2019 (subject to change)
Registration Begins	August 1, 2019
Registration Ends	November 15, 2019
Participant Deadline to Sign Installer Contract	December 31, 2019
Installations Completion Goal	Spring 2020

***If you have any questions about the Program structure or RFP please contact BC3 at SunShares@bc3sfbay.org**

2.2 Program Area

The Program Area includes the nine Bay Area counties (Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma) plus Yolo and Sacramento Counties.

The Program seeks to select two or more installers to cover the Program Area. Please propose coverage on a county-level basis - either you will provide service across a whole county, or not. Please do not propose a service radius from your office location.

Installers may propose service coverage as follows:

Core Service Territory - the base area in which installation services will apply, with no travel adders.

Extended Service Territory (optional) - an area beyond the Core Service Territory where an Installer is willing to provide service, with the addition of a travel adder. Travel adders may be levied on a per-mile or per-county basis (outside the Core Service Territory) and must be delineated at the time of proposal submission.

In addition to the core Program Area, some private employers participating in the program may have a limited number of employees living in the following counties. Installers should address which of these additional counties they could service:

Joaquin, Placer, Butte, Kern, Humboldt, Monterey, Stanislaus, Shasta, Santa Cruz, Merced, Yuba, and



Madera.

In your submission, please indicate which counties are in your Core Service Territory, and which (if any) comprise your Extended Service Territory (and what adders apply therein).

3. PROPOSAL INSTRUCTIONS

Installers may contact BC3 with any questions or requests for additional information needed to submit a proposal. An addendum will be issued no later than 72 hours prior to the proposal due date to all recorded holders of the RFP if a substantive clarification is deemed necessary.

3.1 Proposal Due Date

- BC3 must receive proposals no later than May 10, 2019 at 5:00PM PST.
- Proposals must be submitted electronically to: SunShares@bc3sfbay.org with the subject line “BC3 SunShares – Solar – Installer Name”. All proposals will receive a confirmation email response to verify receipt.
- Mailed, faxed and late proposals will not be accepted. Proposals may be withdrawn at any time before the due date and time noted above via an emailed request. In order to maintain the fairness and integrity of the selection process, proposals must conform to the requirements of this RFP.

3.2 Communication

- All communications shall be via email to: SunShares@bc3sfbay.org
- Communication with the participating employer organizations or members of the volunteer employee evaluation committee for the purpose of unfairly influencing the outcome of this RFP may be cause for the Installer’s proposal to be rejected and disqualified from further consideration.
- BC3 is not liable for any costs incurred by an Installer in the preparation and/ or submission of a proposal. Any material submitted by Installers will become the property of BC3.
- BC3 may modify the RFP at any time prior to the proposal due date, by issuance of a written addendum to all proposers who are participating in the process.
- BC3 may also cancel, delay, or suspend this solicitation at anytime if in the best interest of the Program participants represented as determined by BC3
- BC3 may also reject any or all proposals, in whole or in part, if in the best interest of the participants represented as determined by BC3.
- During the evaluation process, BC3 has the right to require any clarification it needs in order to understand the Installer’s approach. BC3 and the volunteer employee evaluation team may choose to interview the highest ranked Installers. BC3 anticipates Installer selection by May 31, 2019.



3.3 Proposal Format and Evaluation Criteria

Please create project proposals in 8 1/2" x 11" document sizes using a minimum 11-point font size. Proposal narratives shall not exceed 10 pages, excluding Exhibit C.1 - C.3 (Required) or any appendices.

3.3.1. Executive Summary (REQUIRED Narrative)

The Executive Summary shall discuss the highlights; key features and distinguishing points of the Proposal, as well as any unique problems perceived by the Installer and proposed solutions. The Executive Summary must be prepared and signed by a manager having the authority to make offers and enter into agreements on behalf of the Installer. Installers are welcome to partner, but one Installer must be the lead company on the proposal.

3.3.2. Qualifications of the Project Team (REQUIRED Narrative)

- Describe in more detail the applying Installer(s) ability to manage the potential demand of SunShares, based on your size capacity. Please discuss how your experience on previous projects relates to the SunShares Program.
- Identify the key project team members by name / position and provide experience including but not limited to, partners assisting in project financing, customer service, outreach, project engineering, design and installations.
- Discuss Installers employment practices (including apprenticeship and mentoring) as well as corporate sustainability and environmentally preferable procurement activities. Specifically, please describe how your firm will manage equipment at the end of its useful life (ex. does PV module manufacturer or installer have a cradle-to-cradle lifecycle guarantee / recycling plan).
- Provide a description of Installers health and safety record and practices.

3.3.3. Scope of Services and Schedule (REQUIRED Narrative)

Provide a narrative that outlines a detailed strategy that should at a minimum address the following items:

- Outline what Installers current average installation cost for direct purchased residential system in the greater Bay Area area is. Please provide cost information for both purchased PV systems (\$/watt) and Lease/PPA (\$/kWh) systems, as applicable.
- Program Plan: Provide a plan for implementation for the Scope of Work (Exhibit A), describing the proposing Installer's ability to provide solar PV installation services to participants during the Program period. Specifically, the proposal should describe the Installer's ability to provide timely customer service, site assessments, and installation services.



Please elaborate on the specific intake process for Program participant leads, method for screening sites, and an installation schedule. Include an estimate of the number of residential solar PV projects the Installer team can complete on a monthly basis.

Describe a quality assurance process for the solar PV installations and outline the process for managing any permits, inspections and the interconnection process with the local utility. Finally, outline how the quality of the proposed equipment and installation process will be explained to the Program participant.

- **Timeline:** Provide an expected timeline for the average Program participant registered in the Program to guide participant expectations.
- **Geographic Proximity:** Provide a plan to address the Installer's geographic proximity to the targeted Program area and how this will shape the services provided.
- **Financing Options:** Please describe all financing options Installer will offer Program participants. Include details on credit score requirements, interest rates, terms, and conditions for the various financing product options.

Please add a statement confirming that Program participants are not required to use Installers financing options and may opt to pursue loans with other financial institutions or PACE financing for a direct purchase and / or prepaid leases.

Please note: Installer eligibility to participate in PACE programs may be considered in the evaluation and scoring of proposals.

- **Multi-Family:** The majority of participants will be seeking proposals for single-family occupied homes. However, there will likely be interest from participants living in duplexes and condominium buildings, and in response to the new Solar On Multifamily Affordable Housing (SOMAH) program established by AB 693 that will be rolling out late 2018. Please address whether and how your firm handles these types of installations, as well as, Homeowner Association architectural review processes.
- **Electrification:** Please describe your company's interest in electrification. Outline how you will engage households in conversations regarding home and vehicle electrification opportunities (ie: heat pump water heaters and heating systems, electric vehicle charging stations, electric laundry dryers and induction stoves) and, implications for PV system design and electric panel upgrades.
- Proposal for sites that are not feasible for solar PV: Outline the process by which the Installer will handle leads that do not have feasible sites for solar PV.

3.3.4. Proposing Firm Profile (REQUIRED) - PLEASE SUBMIT via Exhibit C.1 - Excel (XLS) Format

- Please include the number of residential solar installations your company has completed over the past two years, along with the average residential system size (kW) installed.
- Describe Installers ratio of part time to full time employees.
- Installers must be registered contractor in the State of California to be considered for this project.



- At a minimum, the installation contractor must have a C-10 Electrical Contractor or C-46 Solar Contractor license.
- Any company that sub-contracts installation work to a C-10 or C-46 contractor must have a “B” license.
- Any other licenses or certifications that are required by the California Public Utilities Commission or California Energy Commission under the California Solar Initiative solar incentive program (see CSI handbook).
- Contractors shall be licensed, insured and bonded.
- Please provide details regarding average number of systems per week that Installer or subcontractors can complete, for standard installations (i.e. Those with no additional roofing work/panel upgrades/structural reinforcement/tree trimming/ etc.).
- Please describe the minimum / maximum system size (in kW) to be installed for Program participants as part of the SunShares Program.
- Provide references for at least five (5) of its projects.

3.3.5. Pricing Proposal (REQUIRED) - PLEASE SUBMIT Exhibit C as part of your proposal as an XLS file (Please do not convert to PDF or another format).

- Outline the discounted Purchase Price, the discounted Lease/PPA Price (if financing option is offered), and the additional financial incentive based on Program installation capacity milestones that you will provide for the SunShares Program on the Pricing Proposal (Exhibit C). Financial incentive for Program installation capacity milestones can include, though is not limited to, a rebate, gift card, or other financial incentive.
- If offered, the Lease/PPA price should assume the customer is putting no money down for a system that will produce 90 percent of optimal production, and should be presented on a \$/kWh basis if possible. For third-party ownership offerings that are a fixed monthly payment (i.e. \$/month), the payment should be translated into a \$/kWh price for means of comparison. Please include the Lease/PPA term (in years), and any annual rate escalator (%), if applicable.
- Pricing proposals must represent the total installation costs for a residential solar PV system. This should include system design; permit allowance, applicable materials and equipment, transportation, labor, and all equipment and workmanship warranties. The price should be independent of any sales tax or any state or federal tax credits or incentives available to Program participants.
- System Specifications: The Program is interested in high quality as well as cost competitive equipment. Identify system specifications for equipment that will be used for projects going through the Program, including equipment manufacturers, models (ex. module wattages, efficiencies), and warranties for modules, inverters, racking, meters, and data acquisition systems, if applicable. Please include details in your proposal about applicable labor and roof penetration warranties as well. Production guarantees in addition to product warranties are encouraged.



Proposed modules and inverters shall be listed as eligible equipment on the California Energy Commission (CEC) GoSolarCalifornia website:

http://www.gosolarcalifornia.ca.gov/links/equipment_links.php.

Please include these system specifications on Exhibit C.

- Price Contingencies (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 Price Contingencies Form (Exhibit C.3). BC3 will not recognize any project related cost adders if they are not outlined in Exhibit C.3 at the time of the proposal. Installers will be responsible for identifying individual projects that trigger additional pricing and will itemize adders on a Program participant's proposal for transparency. Cost adders, such as Full Panel Upgrades can be included on individual participants' quotes as a discount to encourage further electrification. Upgrading the panel to a higher amperage as allowable by the feeder line to provide capacity for future household electrification. Ideally this would be to a minimum of 200 amps, and up to 400 amps where possible. The full cost of the system, including the panel upgrades, is considered as part of the Solar Income Tax Credit, for which the homeowner may be eligible.
- Participant Proposals: All proposals provided to Program participants shall itemize the cost of each technology option if more than one is offered (example: mid-efficiency vs. high efficiency modules or central inverter vs. micro-inverters) and any adders that may be needed to complete a participant's project. Levelized costs of electricity (LCOEs) in \$/kWh shall be provided for each equipment & finance combination, to allow for directly comparable evaluation of options by each participant. Applicable state and federal incentives should also be included on individual participants' quotes.

4. APPENDIX: SUPPORTING INFORMATION

The Appendix may include any supporting information, such as resumes, or other data such as equipment cut sheets that will support your Firm as the best proposer for the project. You may also include sample customer contracts in the Appendix.

5. PROPOSAL EVALUATION

All proposals must meet SunShares Program objectives and must be responsive to the relevant scope of work and proposal requirements outlined above. Proposals will be evaluated on the general criteria below:

- Threshold Requirements: Applications must meet a threshold review before they will be provided to the volunteer evaluation team. To meet the threshold review, proposals must include the following:
- Installer has demonstrated significant experience installing residential PV systems;
- Completed and signed Exhibits B, C.1, C.2, C.3, and D;
- A Purchase Price option (presented as a \$/watt price) and corresponding financial incentive(s) on



Exhibit C.1, along with clear pricing (\$/kWh for Lease/PPAs) and terms and conditions (including length in years, and escalator, if applicable) for any additional financing options being offered.

- The proposed Purchase Price to Program participants must be discounted off the current installation cost in the Program area
- Identify any project price adders and the range of any price escalators on Exhibit C.3;
- A template copy of a direct purchase contract as well as any necessary agreements (loan, lease or PPA) for any additional financing options offered, specifying the terms and conditions;
- Identification of third-party partners that enable the additional financing options (Loan, PACE and / or Lease / PPA)

Once an Installer proposal passes BC3's threshold review based on the requirements listed in this RFP, the volunteer community evaluation team based on the following criteria will evaluate the proposals:

- Overall quality and value: overall quality of proposal and specified equipment;
- Experience: degree of Installer's experience and proficiency in the scope of work, including demonstrated experience in developing, designing and installing residential solar PV systems. In addition, experience of Installer team (if applying in partnership with other companies).
- Implementation: ability to provide timely, quality customer service and installations within the geographic scope of Program.
- Price structure: quality and simplicity of pricing proposal for both Purchase (\$/W) and any additional financing options along with their corresponding financial incentives. In addition, the value offered by the proposed equipment, price adders, price escalators, and contract terms and conditions will be considered.

6. GENERAL REQUEST FOR RESPONSE CONDITIONS

6.1 Notice of Confidentiality - General Statement

All of the material submitted to BC3 will be considered confidential. As a fiscally sponsored non-profit organization that is not a public entity, BC3 is exempt from publicly disclosing any documentary material data, or other information received from an applicant.

6.2 Contractual Requirements

Upon the RFP evaluation team's selection of a proposal, BC3 and the selected Installer(s) will execute a contract, which will set forth the respective roles and responsibilities of the parties. See Exhibit D for a draft version of this contract.



6.3 Waiver Authority

BC3 reserves the right, at its sole discretion, to waive minor irregularities in submittal requirements, to modify the anticipated timeline, to request modifications of the application, to accept or reject any or all applications received, and /or to cancel all or part of this RFP at any time prior to awards.

6.4 Disclaimer

This RFP does not commit BC3 to award any funds, pay any costs incurred in preparing an application, or procure or contract for services or supplies. BC3 reserves the right to accept or reject any or all applications received, negotiate with all qualified applicants, cancel or modify the RFP in part or in its entirety, or change the application guidelines, when it is in the best interests.

SUNSHARES - PROGRAM ADMINISTRATION FEES

A \$0.15 per watt Program administration fee based on the total installed PV capacity will be applied to the selected Installer(s) for the Program administration services described above. Please do not include this fee as an adder. Please include fee in your Firms single fixed pricing structure.

Exhibit A – Scope of Work

Installer(s) selected for the 2019 SunShares 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. Installers will play an integral role in outreach and educational events coordinated between BC3 and participating organizations.

As leads are identified (registered through the Program website), the Installer will provide site assessments (as appropriate) and system designs for individual residential 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 proposed cost. The system design should maximize system production while minimizing project cost and shall itemize any adders for transparency.

Upon contracting, the Installer will be responsible for providing each customer with a turnkey service, which includes securing all local permits, and completing the installation within one year of the Program end date. In addition, the Installer will be expected to provide information regarding net metering, and any other local, state or federal incentives available for the customer.

In order to be eligible for the Program, residential projects must meet all applicable requirements for the



local Authority Having Jurisdiction (AHJ) where the Program participants' home is located.

The Installer will provide to BC3 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, financing options associated with signed contracts and contracted capacity.

The Installer will be able to contract with customers through December 31, 2019. The Installer will be required to provide BC3 with a final report outlining the total number of contracted customers within the Program and the resulting prices and volume rebate associated with each installation by January 6, 2020.

Installer responsibilities:

1. Cooperate and collaborate with BC3 and its Program partners;
2. Provide customers within the Program area with discounted pricing, and provide tiered incentives based on volume, as outlined in the Installer's competitive bid, to all customers under the Program.
3. Track the pricing associated with each project, and detail why a specific project requires a cost adder;
4. Track the total contracted capacity under the Program;
5. Provide objective information to enable customers to choose either a cash purchase, lease/power purchase agreement or financing through various PACE programs;
6. Provide weekly metrics, as directed by BC3, which shall include, but is not limited to, the number of leads generated, the number of feasible project sites identified, the number of contracted projects, and the tracked information maintained by Installer;
7. Make a reasonable effort to track why customers decide not to contract for a solar PV project;
8. Utilize equipment listed in the Pricing Proposal ("Exhibit C") submitted by Installer for all projects contracted during the Program. If an equipment substitution is required during the course of the Program, the Installer is responsible for getting BC3 approval in advance of submitting proposal to customers.
9. Refer to the Program as "Bay Area SunShares" or "SunShares."
10. Collaborate with BC3 on all press releases or events concerning the Program. In any media produced by the Installer, the Installer will not represent that positions taken or advanced by it represent the opinion or position of BC3 or the participating Program organizations;
11. Include a disclaimer on all Installer customer intake forms and media (such as sign-up sheets) that outlines how customer contact information will be used under the Program and provide the customer with the ability to opt out of communications unrelated to solar PV installations under the Program; sign-up period an evaluation of how successful various marketing material disbursement methods were relative to the sign-up and adoption rate within the Program;
12. Participate in appropriate marketing and outreach events within the Program area, as well as any



- meetings organized by BC3;
13. Upon request by BC3, provide to BC3 at the end of the Program sign-up period an evaluation of how successful various marketing material disbursement methods were relative to the sign-up and adoption rate within the Program;
 14. Upon request by BC3, provide feedback at the end of the Program to assist BC3 in the analysis of the efficiency of different outreach strategies and community drivers in increasing community adoption of solar; and
 15. Provide any other information reasonably requested by BC3