

AUSTERLITZ CLIMATE COMMITTEE INVITATION FOR COMMUNITY SOLAR PROVIDER'S PROPOSALS

June 15, 2021

Background

1. Austerlitz Climate Committee Team Organization and Preparation (Spring – Summer 2021)
 - A. The Austerlitz Climate Committee Team organized a core group of individuals responsible for the implementation of the campaign.
 - B. The Austerlitz Climate Committee Team successfully applied to participate and receive support from NYSERDA.
 - C. The Austerlitz Climate Committee Team has developed an outreach plan and is preparing for community education and marketing during the campaign.

2. Community Solar Providers Selection (June - August 2021) – See **Attachment A** for Key dates
 - A. Eligible Providers interested in participating in this campaign are invited to submit proposals to the Austerlitz Climate Committee Team.
 - B. The Austerlitz Climate Committee Team, with assistance from the NY-Sun's technical assistance provider, reviews and evaluates proposals. Interviews are conducted with a short list of providers.
 - C. The Austerlitz Climate Committee Team plans to choose one to three providers to participate.

3. Community Marketing Campaign (Sept 2021 – Aug 2022) – See **Attachment A** for Key dates
 - A. The Austerlitz Climate Committee Team, working closely with the Selected Providers to coordinate messaging and activities, will implement a community marketing and education campaign. The campaign will utilize media outreach, social media, and online marketing along with other activities to encourage area residents and businesses to sign up.
 - B. The Austerlitz Climate Committee Team and Selected Providers will clearly present to potential Austerlitz Climate Committee participants that, before signing a contract with the Selected Provider, they are free to independently seek other offers.

4. Participant Signup (September 2021 – August 2022)
 - A. Austerlitz Climate Committee will refer interested residential and business customers to the provider's webpage and/or designated contact for information about the provider's offer. Customer's that indicate they wish to participate will be offered a contract by the provider with the substantial terms of the contract submitted for this proposal.

Eligibility Requirements

To be eligible to submit a proposal, Provider's must:

1. Provide a consistent and credible offer and service as agreed to with Austerlitz Climate Committee and the Austerlitz Town Board to Austerlitz area residents, businesses, and/or farms who are rate payers.
2. Agree to, if selected, provide monthly reporting to Austerlitz Climate Committee including customer names, date of contact, date contract signed, initial date of service provided, and relative notes.

Proposal Requirements

Proposal requirements include (1) cover letter on company letterhead, (2) Qualifications and financial statement, (3) Detail Information and (4) standard contract.

Cover Letter: Include Solar Provider Cover Letter (**See Attachment B**) signed by authorized company representative on company letterhead.

Qualifications and financial statement

1. **Provider Team Qualifications:** Describe the project team, including, but not limited to, partners assisting in project financing, customer management and billing, and marketing and outreach.
 - a. Highlight relevant experience, skills, and capabilities necessary to implement this campaign.
 - b. Summarize your experience with group purchasing programs, as well as any other Community Solar campaigns for which you are applying.
 - c. Provide at least two references of your programs with other local communities.
2. **Financial Strength and Credit Relationships:** Describe the state of the financial health of the company and how it will manage the financial requirements of the community solar project for the Austerlitz Climate Committee campaign.
3. **Detail Questions. Please provide your answers in a separate document using the below numbering scheme.**

A. Firm Name _____

B. Firm Address _____

C. Capacity:

- i. Total existing NYSEG Capacity (in nameplate watts):
- ii. Unused existing NYSEG Capacity available for Austerlitz subscribers:
- iii. Planned future Additional NYSEG Capacity:
- iv. Planned Time when Additional NYSEG Capacity will become available to Austerlitz subscribers:

- v. How long does it take to get a subscriber allocated?
- vi. Do you wait to fill a solar development prior to allocation, or are subscribers allocated immediately (pending utility timelines) when they sign up?

D. Pricing, Fees and Contract Terms:

- i. CDG- Community Distributed Generation is an electronic transfer of solar electricity from solar farms thru the utility to the account holder. CDG discounts both supply and delivery charges. Will the service provider guarantee at least a 10% reduction in charges from NYSEG? Yes/No. If yes, how much savings is guaranteed?
- ii. Describe how the savings will be calculated.
- iii. Are there any upfront fees to sign up? Yes / No. If yes, what are they?
- iv. What are the terms/penalties for termination of a contract?
- v. Can a resident discontinue their service arrangement at any time? What time restrictions and applicable fees are there for a resident to terminate a contract?
- vi. Are there any late fees or other unknown fees?
- vii. Do you offer monetary sign-up bonuses to customers and/or municipalities? If yes, please describe.
- viii. Is there a credit check required for the potential subscriber? If so, what are their FICO score requirements?
- ix. Are there any other significant pricing, fees, or terms of agreement with the subscribers that should be noted? If yes, please describe.

E. Billing: Consolidated billing legislation was passed in Dec. 2019 and mandated that utilities consolidate billing in Jan 2021. This was delayed due to Covid, so we're told. Will the charge for community solar be paid through a consolidated NYSEG bill, i.e., a single invoice per month for both supply and delivery electricity charges?

F. Will offers extend to (Y/N):

- i. Commercial Customers _____
- ii. Industrial Customers _____
- iii. Municipal Customers _____
- iv. Agricultural Customers _____

G. Marketing.

- i. Will the service provider be responsible for marketing community solar to the residents of Austerlitz? Yes/No. If yes, provide examples.
- ii. Will the service provider work with the Town of Austerlitz to help ensure as many residents as possible are contacted, or given the opportunity, to obtain community solar?
- iii. Will the service provider also be the organization that provides for both the marketing and the actual community solar supply?

H. As we understand it, CDG shares are typically calculated to produced 90% of utility history consumption. Does the service provide guarantee that the source for 90% all solar energy is within New York State?

I. Do you offer customer support services?

J. Liability. Are you in agreement that all formal relationships will be solely between the subscriber and the service provider, i.e., the Town of Austerlitz is not a party to the agreements made, and the Town of Austerlitz has no liability or responsibility with regards to any decisions or agreements or obligations made between the service provider and the subscribers?

4. **Electrical Customer Contract:** Provide a standard customer contract (or contracts if different contracts will be offered for commercial, industrial, municipal, and agricultural) specifying all terms and conditions for a potential Austerlitz subscriber, including standard customer savings.

Evaluation Criteria

All proposals must meet the proposal requirements outlined above. Proposals will be evaluated on the general criteria below:

1. **Overall quality and value:** Overall quality of proposal and Community Distributed Generation (CDG) contract terms.
2. **Experience:** Provider's experience in providing customer acquisition, billing, and account management.
3. **Implementation and capacity:** Strength and ability to provide timely, quality, and enduring customer service and work well with the Austerlitz Climate Committee Team.
4. **Adequate financial strength:** Selected Providers must be able to demonstrate sufficient capacity to successfully deliver community solar electricity.
5. **Marketing Support:** Marketing Support that will be provided to Austerlitz Climate Committee.

Disclaimer

This request does not commit the Town of Austerlitz to award any funds, pay any costs incurred in preparing an application, or procure or contract for services or supplies. The Town of Austerlitz reserves the right to accept or reject any or all proposals received, negotiate with all qualified applicants, cancel or modify this invitation in part or in its entirety, or change the schedule, when it is in its best interests.

Roles and Responsibilities

	Town of Austerlitz	Selected Providers	Customer
Organize Solarize Campaign	<ul style="list-style-type: none"> • Gather a community team of volunteers, including a lead contact and a Selected Developer(s) selection committee • Evaluate Provider proposals and select Providers • Build partnerships among various community leaders/organizations to help with outreach 	<ul style="list-style-type: none"> • Submit accurate and complete proposal 	
Reduce Costs	<ul style="list-style-type: none"> • Co-Lead community outreach with the service provider to help the Austerlitz Climate Committee campaign reach target goals • Help community participants understand Austerlitz Climate Committee approach and set expectations 	<ul style="list-style-type: none"> • Provide competitive, transparent pricing 	<ul style="list-style-type: none"> • Provide all necessary information
Marketing/Outreach	<ul style="list-style-type: none"> • Organize/mobilize community networks and utilize a broad range of tactics to get the word out • Host outreach activities and provide tables at existing community venues • Send regular Solarize updates to community contacts • Manage customer expectations during the outreach process. 	<ul style="list-style-type: none"> • Participate in outreach planning • Participate in community outreach where appropriate • Manage customer expectations • Optional: supplement community outreach (direct mail, yard signs, etc.) 	<ul style="list-style-type: none"> • Promote Austerlitz Climate Committee through social media and networking circles • Consider volunteering to help with the campaign
Education	<ul style="list-style-type: none"> • Answer community questions about the Community Solar campaign • Answer basic solar energy questions and direct residents to available resources 	<ul style="list-style-type: none"> • Participate in the Austerlitz Climate Committee launch • Answer technical questions from volunteers/residents 	<ul style="list-style-type: none"> • Attend educational events and ask questions
Web and Media	<ul style="list-style-type: none"> • Assist in providing content (including photos and stories) for Austerlitz Climate Committee web pages and media outreach • Encourage and cooperate in local media coverage • Submit “letters to the editor” to local newspapers 	<ul style="list-style-type: none"> • Cooperate with Austerlitz Climate Committee Team to provide content (e.g., photos, stories) and accommodate reporters 	<ul style="list-style-type: none"> • Consider participating in media coverage
Customer Service	<ul style="list-style-type: none"> • Provide participants with information about the Austerlitz Climate Committee campaign and process • Respond to inquiries and forward to the Providers as appropriate 	<ul style="list-style-type: none"> • Follow up promptly to participant signups and inquiries • Provide explanation for all terms 	<ul style="list-style-type: none"> • Be responsive to Provider communications

Attachment A – Key Dates

RFP Released	Date: __06/15/2021
RFP Questions Due from candidate providers	Date: __06/30/2021
RFP Question Responses Released	Date: __07/15/2021
RFP: Proposals Due	Date: __07/30/2021
Interviews	Date: _ August, 2021
Installer(s)/Vendors selected	Date: _08/30/2021
Launch Event	Date: _09/15/2021
Public Outreach & Education Events	Date: Sept, 2021 – August, 2022
Participant Sign-Up Deadline	Date: _09/30/2022
Participant Contracting Deadline	Date: _12/31/2022
Installations	Date: _TBD_____

Attachment B: Solar Provider Cover Letter

The undersigned is the duly authorized representative of the company or entity identified below (the “Company”), with full authority to sign this document and to submit the Company’s proposal to Participate in the Austerlitz Climate Committee campaign.

I hereby certify:

- The Company is duly organized and in good standing under the laws of the jurisdiction in which it is organized. The financial statements are true, correct, and complete and fairly present the financial condition of the Company as of their date. Since the date of the most recent financial statements, there has been no material adverse change in the Company’s financial condition. All tax returns required to be filed in any jurisdiction have been duly filed, and all taxes due in respect of the Company have been duly paid.
- The Company has read the invitation, understands it and is familiar with its requirements.
- The information contained in this proposal, and any correspondence or other documentation relating to this proposal, are all true, correct, and complete. The information disclosed by the Company in this proposal relating to corporate partnerships, affiliations, and other relationships is true, correct, and complete.
- The Company understands and acknowledges that, until final selections are made, the Austerlitz Climate Committee Team may enter into discussions with the Company to negotiate the terms of its proposal in an effort to reach the most favorable arrangement for the relevant community. Moreover, the Austerlitz Town Board reserves the right (i) to reject any or all proposals; (ii) to waive defects or irregularities in any proposal; (iii) to discontinue discussions at any time and for any reason; (iv) to correct inaccurate awards; (v) to change the timing or sequence of activities related to Austerlitz Climate Committee; (vi) to modify, suspend or cancel Austerlitz Climate Committee; and (vii) to condition, modify or otherwise limit participation.
- By submitting this proposal, the Company represents and warrants that, if it is selected to provide community solar under Austerlitz Climate Committee, it will perform all of the duties and obligations of a “Selected Provider” in accordance with the Austerlitz Climate Committee Invitation for Community Solar Provider Proposals and the Company’s submitted proposal.

Provider: _____
(Printed Name of Provider Organization)

By: _____ Title: _____
(Printed Name of Authorized Representative)

Signature: _____ Date: _____