



Renew300 REQUEST FOR PROPOSALS TEMPLATE INSTRUCTIONS



SOLAR RFP TEMPLATE GUIDANCE BY SECTION

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Instructions for Using the Solar RFP Template

The **Solar RFP template** is structured and formatted for customization. It contains key elements that are needed to solicit proposals from integrated solar project developers (for systems owned and operated by an outside party on the affordable housing property) or from solar installation firms (for systems owned outright by the housing organization) for one or multiple properties and to enable reviewers to fairly compare qualifications and pricing. The template has been created using HUD-specific experience combined with industry best practices for solar project procurement in the housing and commercial sectors.

Users of the template should check any applicable organizational, local, state and/or Federal procurement requirements and incorporate any necessary provisions and language accordingly. For example, if a public housing authority is using Federal resources for the procured solar services/equipment, the procurement provisions at 2 CFR 200 will apply and need to be incorporated and those standards met. Refer to the **Solar RFP Toolkit Introduction** for additional information and resources.

Each section has placeholders for information **[in brackets]** that needs to be replaced by the user with customized language. The template is provided in a basic Word format for easy integration into a housing organization's typical document editing and formatting. Four **RFP Attachments** are also provided in a format for user customization:

- Attachment A – Listing of Sites and Site Electricity Usage (provided as a separate document in Microsoft Excel)
- Attachment B – Solar PV System Minimum Equipment and Construction Requirements (included within the Solar RFP Template Word document)
- Attachment C – Contractor Insurance Requirements (included within the Solar RFP Template Word document)
- Attachment D – Cost Proposal Form (provided as a separate document in Microsoft Excel)

Additional attachments can be included, as needed, for the particular situation.

This guidance is organized in the same order and structure as the solar RFP template so that readers can follow along as they prepare the RFP. It is recommended that readers become familiar with the entire RFP document prior to beginning customization of the template and include other stakeholders to the potential solar project(s) to ensure a common understanding of the document and process.

1. OVERVIEW

This section of the RFP is intended to provide potential Respondents with information about the issuing Organization, background about this effort to solicit solar proposals, what is being requested, and the overall RFP timeline. Providing this overview explains how the goals of the organization and this solar effort are aligned and establishes expectations for Respondents.

1.1 Introduction

Providing an introduction to the RFP is the first step in helping potential Respondents understand the purpose for this RFP, the scope of the project(s), and how the proposals will be used. This context for the RFP can generate interest among Respondents because they can recognize the serious intent that the Organization has in finding viable development partners or other types of solar vendors. Participation in HUD's Renew300 program and/or other renewable energy efforts should be described in this section as well.

Customizations for this Section

[Respondent type] – Should be based on the desired approach for solar project development – typically an installer for selected locations of solar systems (solar vendor) or a long-term partner to develop solar opportunities over time (solar development partner).

[Organization] – Name of the Organization that is issuing the RFP and looking for solar PV on its site(s).

[State/Region] – Describes the general vicinity where the target sites are located.

[Location] – Describes the specific location site(s) within the state/region. For example, a property in Atlanta [Location] may be one of multiple sites in Georgia or the southeast [State/Region].

[Size/Capacity] – Numerical value of the potential capacity (peak output under standard test conditions) for solar PV expressed in kW or MW for one or many sites in total. This should be expressed either as a range or an “at least” amount to enable best-fit solutions from Respondents. Standard practice in the solar industry is to express capacity in direct current (DC), rather than in alternating current (AC) terms.

[Period in years] – Numerical value for the number of years over which the Organization intends to pursue solar project development, ideally with a selected Respondent to this RFP.

1.2 About Organization

Background information about your Organization provides potential Respondents with information needed to assess constraints, opportunities, and alignment with Organizational goals. Respondents will be interested in the overall opportunities across the affordable housing Organization's portfolio of sites, if applicable, and how Organizational structure and property ownership/management may affect their proposal and its evaluation.

Customizations for this Section

[Organization] – Name of the Organization that is issuing the RFP and looking for solar PV on their site(s).

[Number and location of sites] – Description includes the total number of sites that are owned or managed by the Organization and their locations (state/city/county).

[Organization type] – Describes the nature of the Organization so that Respondents can understand how that might impact financing and tax benefit options. Types may include (but are not limited to) non-profit organization, city or county agency, for-profit housing company, real estate partnership, or property management company.

[Attachment A] – This attachment is optional and includes a listing of all the sites that may be considered for solar PV.

[Description of Organizational mission...] – Describes the Organization's overall goals and plans for clean power deployment and should include any external commitments (ex. Renew300 or Better Buildings Challenge) or internal efforts underway and accomplishments to date. This information demonstrates to Respondents the intent, purpose, and commitment of the Organization's pursuit of solar PV development.

[Organization's role in housing] – Describes what the Organization does in the affordable housing sector. This may include multiple roles, such as development, preservation, management and/or financing of affordable, program-enriched housing across the country.

[Housing type(s)] – Describes the type of housing that is provided and the typical clientele and may include multiple types such as low-income families, seniors, or persons with special needs.

[Website] – URL for the Organization's website.

1.3 RFP Timeline

The process and timeline for this RFP will ensure that all potential Respondents know the key dates and internal stakeholders are prepared for events related to the RFP. Language provided in the template also indicates that the dates are subject to revision, if needed. Any changes should be immediately communicated to the pool of potential Respondents.

Customizations for this Section

[Dates, Times] – This information is critical for potential Respondents to understand and comply with deadlines related to the RFP. Times should include time zone for clarity.

2. SCOPE

This section provides the scope of the planned solar PV project(s) that will be used by Respondents to develop their proposals. The scope should explicitly state what is expected and what a successful project and/or partnership would look like in the future. Any additional features, financing, or options that are requested should also be included in this section. No other sections in the RFP should be used to augment the scope in this section to avoid confusion or overlapping requirements. However, attachments can be used to provide detailed information that supports the scope description, as needed.

2.1 Solar PV Projects

An explicit description of the type of project, financing, and project success criteria is a core element of any RFP and ensures that Respondents' proposals include a viable solution to meet these criteria.

Customizations for this Section

[Organization] – Name of the Organization that is issuing the RFP.

[Developing and/or constructing] – Select the appropriate type of vendor contracting relationship for this RFP. Developing means working with a vendor to help select, procure and install a solar project with or without financing (including power purchase agreement or "PPA" financing). Constructing applies to projects for which all of the site details have been determined and the Organization expects to own and operate the PV system.

[Site(s)] – Describes the specific locations for each site. If there are four or fewer, they can be listed individually here. If there are more than four, it is typically easier to reference the geographic area where they are all located and then reference Attachment A – Listing of Sites for a full listing.

[Designing, engineering, permitting, financing, installing, and operating] – These functions are related to the type of contracting relationship referred to above and to the financing arrangement. For vendor construction where the Organization owns and operates the system as a capital project, the appropriate functions to include in this list are: designing, engineering, permitting, financing, and installing. For development agreements with financing, the full list can be used: designing, engineering, permitting, financing, installing, and operating.

[Date] – This sets an end date to the development effort which should include completion of construction for one or more sites.

[Expected outcomes(s)] – Describes the quantity, timeframe, and positive impacts that result from solar PV project development as specified in this RFP. Specific, measurable outcomes should be included to provide clarity and avoid misunderstandings later in the site development process.

[Financing preferences] – Describes the type of financing that would potentially be acceptable to the Organization. This typically includes direct/capital purchase, leases, or PPAs.

2.2 Required Site(s)

This list of the sites must be considered by Respondents and included in their proposal. It is provided in this section to ensure that there is no confusion when there are numerous potential sites, but only a selected group of sites is expected to have a full proposal with system designs and pricing. Generally, requiring full details for more than five sites can become burdensome for potential Respondents and may discourage qualified proposals. This is largely because the average system size for the affordable housing sector is on the smaller end of the scale of non-residential solar PV projects. Including too many sites in a single initial RFP may increase proposal costs relative to potential revenue for Respondents when compared to other customer types.

Customizations for this Section

[Organization] – Name of the Organization that is issuing the RFP.

[Location characteristics] – This information is provided to illustrate the types of facilities and where they are located so that Respondents can take this into consideration in creating their proposals and development approach. Characteristics may include attributes of the sites (ex: number of levels, site layout, common usage of facilities, electricity usage, demand metering data, known development challenges, or previously identified opportunities) and neighborhood information (ex: urban environment, surrounding environment, existing or planned interaction with community and adjacent properties.)

2.3 Additional Project Information

This additional information contains Organizational requirements for Respondents including their compliance with local, state, utility, and Federal regulations, insurance coverage, and other key certifications for successful project development. Some Organizations have unique requirements that should be included here (ex: public agencies may require certain wage levels or be subject to an existing labor agreement).

Also included is an optional description of future development activities that may be pursued by mutual agreement between a successful Respondent and the Organization. At the very least, the Respondent should be asked to consider how it will ensure completing the project on time and on budget – especially where more than one project site is being developed concurrently.

Customizations for this Section

[Organization] – Name of the Organization that is issuing the RFP.

3. RESPONDING TO THIS RFP

This section describes exactly what is expected from interested Respondents and the format for their proposals with references to attachments, as appropriate. This section is essential to ensuring that the Organization can make apples-to-apples comparisons between proposals and that Respondents have clarity on how to respond and how their proposals will be evaluated. It is important to make sure that evaluation criteria are aligned with the required elements in the proposals. If they are not aligned, then the evaluation process may not yield an ideal outcome because of avoidable information gaps or internal decision-maker uncertainty during the selection process.

Customizations for this Section

[Organization] – Name of the Organization that is issuing the RFP.

3.1 Prior to Submission

A description of the activities prior to proposal submission are included here including the handling of Respondent questions and the approach to site visits and/or webinars. The appropriate strategy for site visits depends on if there are many sites over a relatively large geographic area. If so, it is advised to conduct a virtual (web-based) site walk so more Respondents can review site characteristics with the Organization's facilities staff. Preparation for this important step must occur in advance so Respondents get a full picture of meaningful site attributes and risks. However, if there are only a few sites within a short distance of each other, on-site visits by Respondents can be scheduled and would be beneficial.

Customizations for this Section

[Organization] – Name of the Organization that is issuing the RFP.

[Date] – This sets a date by which Respondents must submit RFP Questions to guarantee a response.

[A webinar will be held...] – This is where an alternative to on-site visits can be scheduled in the form of a webinar that includes sample site details to simulate the experience and provide information that would typically be gathered by Respondents during an on-site visit. Sample text is included in the RFP template in this section.

[Site visits....] – This is where the Organization can indicate that it will (or will not) host an on-site visit for Respondents on a given day. Generally, if there are only a few sites, this can and should be scheduled. However, for development of a large portfolio of sites, it may not be efficient or effective to have Respondents visiting all sites.

[Information for site visits....] – This information should be provided if site visits are planned and should include specific locations, times, and dates for Respondents and any visit logistics including reservations and identification.

3.2 Proposal Submittal Date, Format, and Method

Details regarding how and when to submit the proposal are included in this section (with some dates provided on the cover page for convenience). Proposal formatting and submission processes are described and verification of receipt is provided assuming that all proposals are submitted electronically only. If required, paper submission processes can be added, although it is much more convenient and traceable for both the Organization and Respondents to use electronic communications.

Customizations for this Section

[Organization] – Name of the Organization that is issuing the RFP.

[Dates, Time] – This information is critical for potential Respondents to understand and comply with deadlines related to the RFP. Times should include time zone for clarity.

3.3 Evaluation of Responses

Providing clear guidance on how proposals will be evaluated enables potential Respondents to submit a tailored proposal that is likely to meet expectations and ensures alignment between Organizational decision-making and Respondent qualifications. Each of the six criteria in the RFP template is included to cover a key aspect of the qualifications and strength of the Respondents' proposals. There is a description for each criterion that includes a high-level explanation of what a successful response would include. The first three criteria are focused on Respondent experience, capabilities, and approach to project development, and can be evaluated by all decision-makers based on real-world considerations and experience. The next three criteria are technical and financial and ideally should be evaluated by experts in these areas, including the contractual process, terms and conditions which should be evaluated both by business leaders and legal counsel. The final criterion is related to additional community or resident benefits that may be offered as part of a solar development agreement (e.g., workforce development, resident engagement, etc.) and can be adapted as needed to meet the Organization's goals.

Internally within the Organization, a template evaluation matrix should be used to compare all aspects of each proposal in an apples-to-apples format by both the evaluation team and senior leaders so that the rationale for selection is clear and sound. If weighting among the criteria has been established in advance, then the Organization may share the weighting in this RFP section for clarity with potential Respondents, although this is not required. If the weighting is shared, then a best practice is to base it on a 100-point scale with all criteria weighting adding up to 100 in total.

Additional evaluation processes are described, including follow-up information gathering, proposal clarifications, interviews, notifications, and contract negotiations. All potential steps in the evaluation process that may involve the Respondents should be considered and communicated in the RFP. However, steps and processes entirely internal to the housing Organization should generally not be included (ex: who exactly will make the final decision).

Customizations for this Section

[Date] – This information is provided for potential Respondents to plan for when they can expect to receive an initial response to their proposal from the Organization.

3.4 RFP Terms and Conditions

Additional disclaimers are important for setting the right expectations and limiting risk for the Organization issuing the RFP. These conditions include the right to modify the process and to take no action as a result of this RFP, if desired. Also, Respondents are responsible for all costs incurred in preparing and submitting their proposal. If the Organization has required boilerplate terms and conditions for RFP processes, they can be added here. However, it is important not to unnecessarily burden the process with legacy requirements of the affordable housing Organization that are not applicable or appropriate for this type of project. Overcomplicating the RFP process will discourage participation by solar firms. However, publicly-funded Organizations may be subject to mandatory processes and requirements which should be included.

4. Information to Submit in the Proposal

All required and optional proposal elements are described in this section along with guidance on the overall approach to creating the proposal. Where appropriate, the format for each section is specified, including maximum page counts and templates that must be used. The cover page is described and sections are listed in the order that they are expected in proposals. A note is included to assure Respondents that their confidential information will not be shared with competitors or externally, including pricing, which can be very sensitive to the business interests of Respondents.

- ***Cover Page***

Respondent is required to include a cover page with specific information elements including: business name, primary address, contact person, contact information, date, and table of contents using the section numbers shown below.

- ***SECTION I***

- ***Company Background and Qualifications***

Respondent capabilities, experience, team bios, and project references are expected in this section. There is generally a page limit so proposals are not burdened by extensive corporate marketing materials that do not provide meaningful insight or comply with the necessary elements for evaluation. Also requested is a list of extended team members (sub-contractors) and prior working experience. For overall business stability, legal proceedings must be disclosed along with financial information to determine risks and relative organizational strengths among Respondents. It also includes a request for any resident or community benefits incorporated in the deployment of solar projects.

- ***SECTION II***

- ***Solar PV Project Development Approach***

This section captures the Respondents' forward-looking approach to developing solar project(s) with the Organization. The key aspects should be described, including prior experience and results in the affordable housing sector and how development activities will be planned and managed. Respondents can also highlight unique value that they can add to the Organization's efforts and overall mission. This section is relevant regardless of the potential relationship with the Respondent because it provides important qualitative factors for comparison among Respondents. There should be a page limit for this section and the information provided will be used to augment the evaluation of relevant industry experience and the potential for Respondents to be a successful partner.

- **SECTION III**
Proposed Solar PV System Description

All aspects described in this technical section should be provided by Respondents for each required site in their proposals. This includes detailed system designs and component specifications that must conform to the technical requirements in Attachment B – Solar PV System Minimum Requirements. Also included are the system electricity output forecasts using solar industry standard modeling tools that must match the data included in Section IV. A construction schedule is required to understand how the Respondents will manage the project(s) and any major technical items that are included or excluded in the project costs or overall proposal must be disclosed. In practice, exclusions and inclusions may differ meaningfully between Respondents and bear special attention by the Organization.

- **SECTION IV**
Solar PV Cost Proposal

This section provides a common understanding about the costs involved with the solar project from each Respondent. It is expected that cost quotes will be firm and held constant for a specified period, after which they may be subject to further refinement and negotiation. As described, there should be no costs that are excluded from the proposal that might be borne by the Organization above what is submitted in this section, unless explicitly characterized as such. It is important to receive the cost proposals in their native Microsoft Excel format from Respondents and to perform a quality and consistency check on the worksheet that has been submitted to ensure that no unauthorized changes have been made. The structure of the worksheet will enable the Organization to conduct rapid comparisons on lifetime project costs among proposals.

In addition, Respondents are expected to forecast net cost savings by year over a 20- or 25-year project lifetime. These numbers are more subjective than the cost quotes described above because of the embedded assumptions that each Respondent uses on the Organization's avoided electric utility costs. Nonetheless, this is useful information for understanding how Respondents view the potential for savings and to determine what methods and assumptions are included.

- **SECTION V**
Sample Power Purchase Agreement/ Project Contracts

This sample document and related addenda will provide insight into the specific legal terms and conditions that the Respondent requests. These documents affect project risks and potential costs and should be used to evaluate proposals holistically, rather than deferring contract evaluation until after a Respondent has been selected. Depending on the preferred financing structure, the Organization may ask only for the PPA and license agreement, but if all financing options are being considered, then relevant capital purchase contracts should also be requested.

Customizations for this Section

[Organization] – Name of the Organization that is issuing the RFP.

[Date] – This information is used as an anchor for creating a project timeline. This should be based on a reasonable date for completing contract negotiations as a planning tool, but it is not an obligation on the part of the Organization.

ATTACHMENTS

These additional requirements and informational attachments are included at the end of the RFP to include technical details and proposal templates while simplifying the core document for better readability. This approach makes the RFP template usable for procurement at additional properties by updating the attachments and some of the deadlines in the core RFP. In addition to reducing the time and complexity of the procurement process, this breakout of the core RFP from its Attachments can accelerate contract negotiations because some of the Attachments (ex: technical requirements) from the winning solar bidder can be extracted from the RFP response and included in a formal PPA, lease, or system purchase contract.

Attachment A – Listing of Sites and Site Electricity Usage (*Provided as Microsoft Excel template*)

This information is provided to indicate where all potential solar PV projects that should be reviewed by Respondents are located so Respondents can look for synergies in project planning, construction, and financing from combinations of sites, along with potential opportunities or challenges that exist in specific locations. The information in this attachment can be provided in Microsoft Excel format using tabs to enable faster and more accurate analysis by Respondents. This worksheet can be used by affordable housing Organizations that seek bids for a single site or for multiple sites.

Electricity information for sites is generally provided in detail for at least the past 12 months. Ideally, the data for each site would be based on “interval data” from 15- or 30-minute usage increments over an entire year. However, because such data are not always easily accessible even with assistance from the local electric utility, an alternative would be monthly data over a 12-month period or, without that, summaries of all energy usage and demand components from the past 12 months of bills for all electricity meters at the sites. Also included should be the utility provider and the current electricity rate schedule that the site is using. The template in Microsoft Excel format is based on the minimum requirement of electricity by month and usage category; however, not all rate schedules match this format, so customization may be required. Additional tabs should be created if the RFP includes multiple sites.

Attachment B – Solar PV System Minimum Equipment and Construction Requirements *(Included in RFP Document)*

These requirements include the minimum specifications for solar PV components, design, construction, maintenance, and monitoring that are all expected to be included in the full cost proposed by the Respondents. The template provided may need minor modification based on building codes or unique facility characteristics, but it should largely be kept intact to ensure that all essential solar development practices are included. This attachment can and should be included in the final contract with the solar vendor for continuity between the RFP response and the installed system.

Attachment C – Contractor Insurance Requirements *(Included in RFP Document)*

These items should reflect typical requirements for contractors to the Organization, including the types of insurance, coverage limits, and any exceptional conditions that may need to be considered. Coverages typically include commercial general liability, property, business auto, workers’ compensation, and professional liability. The template attachment has general requirements in a format that is intended to be updated based on specific project and Organizational needs.

Attachment D – Cost Proposal Form *(Provided as Microsoft Excel template)*

This form is provided in Microsoft Excel format so Respondents can insert each solar vendor's values in a standardized worksheet that can be compared directly to the other proposals. The form includes both expected annual performance (electricity output in kWh) and costs over a 20-year solar PV project lifespan. It also allows for bids structured as capital investment prices for direct purchase of systems by the affordable housing Organization and, alternatively, as pay-as-you-go arrangements such as PPAs or leases for systems financed, owned, and operated by third parties. The worksheet calculates some values automatically based on inputs provided by the Respondents and can be customized to include one or many sites.