

ATTACHMENT B: INDIVIDUAL RESPONSE FORM FOR ON-SITE SOLAR INSTALLERS

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 this information pursuant to the **CNY RPDB’s** Request for Proposals (the “RFP”).

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 RFP, understands it and is familiar with its requirements.
- The information contained in this response, and any correspondence or other documentation relating to this response, are all true, correct and complete. The information disclosed by the Company in this response relating to the nature of the Installer partnership (if applicable), corporate partnerships, affiliations and other relationships is true, correct and complete.
- The Company understands and acknowledges that, until a final selection is made under the RFP, the CNY RPDB may enter in discussions with the Company to negotiate the terms of its response in an effort to reach the most favorable arrangement for the relevant community. Moreover, the CNY RPDB reserves the right (i) to reject any or all responses; (ii) to waive defects or irregularities in any response; (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 the **EnergySmart CNY Community Campaigns**; (vi) to modify, suspend or cancel the **EnergySmart CNY Community Campaigns**; and (vii) to condition, modify or otherwise limit the mandate pursuant to the RFP.

By submitting this response, the Company represents and warrants that, if it is selected under this RFP, it will comply with the terms of the RFP and will perform all the duties and obligations of the “Selected Installer” under the RFP.

Printed Name of Installer Organization

Printed Name of Authorized Representative

Title

Signature

Date

INSTRUCTIONS

Please answer all the questions on this form. If more room is needed or questions are better answered by separate documents, please attach the document to your response and clearly refer to them in the answer (e.g., see Attachment A, Staff List).

INSTALLER INFORMATION

COMPANY INFORMATION

Company Name	
Headquarters Address	
Additional locations with proximity to Central New York (Cayuga, Cortland, Madison, Onondaga, and Oswego Counties)	
Company Website	
Technologies to be installed	

Are you listed on EnergySage?	
Are you a listed contractor on NYSEERDA's NY-SUN Website?	
Service Territory	

COMPANY TEAM

Primary Point of Contact	
Contact Title	
Contact Phone	
Contact Email	
Total number of full-time employees	
Total number of part-time employees	

List all relevant key staff (e.g. salespeople, site assessors, Installers, project managers, and key administrative staff) in your company who will be working on the **EnergySmart CNY Community Campaigns**, as well as roles, years of experience, and relevant certifications/licenses held by each. Add additional rows as necessary. This information may also be submitted as an additional addendum.

Staff #1	
Staff #2	
Staff #3	
Staff #4	
Staff #5	
Staff #6	
Staff #7	
Staff #8	

RESPONSE TEAM

Please provide the names and contact information of any subcontractors (e.g. electricians) who would support installations through this program.

Company Name	Technology/Role and Certifications	Contact Person	Contact Phone Number	Contact Email

TECHNOLOGIES OFFERED

If applicable, please list the manufacturers, models, and place of manufacture of technologies you expect to offer to EnergySmart CNY Community Campaign Participants. If not applicable, mark "NA".

Solar Panels	
Inverters Please specify if they are central inverters, microinverters, etc.	
Battery storage	
Solar Racking Systems	
Other clean energy technologies (e.g. L2 charging stations, etc.)	

COMPANY EXPERIENCE

Number of years in operation	
What is your ownership structure?	
How would you describe your business?	
Are your salespeople paid a salary or strictly by commission?	
Do you offer signing bonuses? If so, please describe.	
Number of solar installations in New York State in past 12 months	
Number of solar installations in CNY (Cayuga, Cortland, Madison, Onondaga, and Oswego Counties) in past 12 months	

<p>Please describe any other relevant experience, skills, and capabilities of your company.</p>	
<p>Please provide references, locations, and descriptions for at least five (5) projects within the state completed within the last three (3) years.</p>	

CAPACITY

Describe the number of full- or part-time staff who will be made available to serve the **EnergySmart CNY Community Campaigns** over the course of the campaign, as well as their capacity for site assessments, installations, and marketing.

<p>Expected average number of full-time equivalent (FTE) staff active in community during campaign period (please specify salespeople vs installation crew)</p>	<p>Salespeople:</p> <p>Installation crew:</p>
<p>Expected average number of physical site assessments conducted <u>per week</u> during campaign</p>	
<p>Average estimated number of installations that could be performed <u>per month</u> for this campaign</p>	
<p>Expected average number of hours <u>per month</u> available to assist with marketing for the campaign (including in-person events)</p>	
<p>What impact do the changes to the federal tax incentives have on your capacity over the next 12 months?</p>	

CAMPAIGN AND ENROLLMENT DETAILS

<p>Are you serving or applying to serve as the selected Installer of any other NYSERDA Clean Energy Hubs campaigns?</p>	
<p>Beyond single-family homes, what other project types (e.g. 2-4 unit multifamily, multi-family/condo associations of 5+ units, small commercial, nonprofits, etc.) does your company complete?</p>	
<p>If applicable, please provide details on any additional discount for installations of Low and Middle-Income households.</p>	
<p>If applicable, please describe any discounts (e.g. flat/tiered pricing), customer incentives (e.g. referral bonuses, discounted/free systems after a certain number of contracts signed) you will offer to EnergySmart CNY Community Campaign customers.</p>	

<p>What are the terms of your warranty for parts and labor? Do they require an annual maintenance contract, and if so, what is the rate? Please attach an example maintenance contract, if applicable.</p>	
<p>Describe the financial health of your company and how you will continue to service projects installed through the EnergySmart CNY Community Campaigns for the life of the system. How will you manage the financial requirements related to the volume of installations the EnergySmart CNY Community Campaigns are expected to produce?</p>	
<p>Describe your customer management process, including lead intake, screening, site visit, and installation process</p>	
<p>Describe the typical timeline for customers from lead intake through to project close-out.</p> <p>If applicable, provide the timeline for each technology offered by your team if they differ significantly.</p>	

<p>Describe your quality assurance process, including measures to commission and protect equipment installed and how you will address any customer disputes.</p>	
<p>Describe your geographic proximity to the region and how this will affect your ability to provide services to all regions included in the EnergySmart CNY Community Campaigns.</p>	
<p>If applicable, describe any financing options (including lease/power purchase agreements) you will offer to customers.</p>	
<p>Please describe how you will pass NYSERDA incentives onto the customer (if applicable) and provide support to customers to obtain other incentives.</p>	

Which utility areas are you willing to serve through this campaign? Please check all boxes that are applicable.

- | | |
|--|---|
| <input type="checkbox"/> NYSEG | <input type="checkbox"/> RG&E |
| <input type="checkbox"/> National Grid | <input type="checkbox"/> Solvay Electric |
| <input type="checkbox"/> Hamilton Electric | <input type="checkbox"/> Skaneateles Electric |
| <input type="checkbox"/> Madison-Oneida Rural Electric Cooperative | <input type="checkbox"/> Other |
| <input type="checkbox"/> Marathon Electric | |

Which counties are you willing to serve through this campaign? Please check all boxes that are applicable.

- | Full | Partial | County | |
|--------------------------|--------------------------|---------------|---------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Cayuga | Please describe any partial coverage. |
| <input type="checkbox"/> | <input type="checkbox"/> | Cortland | |
| <input type="checkbox"/> | <input type="checkbox"/> | Madison | |
| <input type="checkbox"/> | <input type="checkbox"/> | Onondaga | |
| <input type="checkbox"/> | <input type="checkbox"/> | Oswego | |

COMMUNICATION AND OUTREACH DETAILS

Please provide details below on how you will support the campaign's outreach and communication.

What additional in-kind advertising (ex: mailers, social media advertisements, marketing collateral) or support are you willing to provide for the campaign?	
Do you or any subcontractors/3rd party affiliates engage in any door-to-door marketing techniques?	

Describe your process for handling customer leads that are not suitable for the technology(-ies) you are offering.	
How would you plan to share campaign participant details and status with the CNY RPDB's EnergySmart CNY program?	

LICENSING AND INSURANCE

Please provide information about all licenses and insurance held by your company.

New York State license number(s)	
Liability insurer, coverage, and policy number	
Worker's compensation insurer, coverage, and policy number	