Agenda

- Overview of Templates & Tools
- Procurement Process Outline
- System Specifications
- Vendor Proposal Checklist
- Pricing Template
- Evaluation Criteria
- LCOE Calculator
- Getting Started
## Overview of Templates & Tools

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<td>o Solar Procurement Process Outline (PV100)</td>
<td>o “How-to Guide” on procurement for solar projects</td>
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<td>o RFP Issuance Checklist (PV105)</td>
<td>o Ensure all necessary information is gathered</td>
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<td>o System Specifications* (PV102/SHW102)</td>
<td>o Standardize proposals and ensure best practices</td>
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<td>o Vendor Proposal Checklist (PV101)</td>
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<td>o Evaluation Criteria (PV104)</td>
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<td>o LCOE Calculator</td>
<td>o Evaluate informal/unsolicited bid pricing</td>
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*Different version for Solar Hot Water
Forms Available in Native Formats

- How-To
- RFP Checklist
- Evaluation
- Cost Proposal
- Specifications
- LCOE Calc
Managing Unsolicited Proposals

Potential Risks
- Due diligence not performed by proposer
- Internal stakeholders not involved
- Pricing not realistic or not competitive
- System specifications not market best practice
- Contract terms not competitive
- Procurement process not administratively acceptable

Suggested Handling

1. Informal Proposal Received
   - Review to become familiar with approach
   - Use LCOE Calculator for pricing evaluation
2. Provide System Specifications (PV102)
3. Proceed with Procurement process (next page)
Procurement Process Outline

Gather Project Data
• Include 12+ months of utility data, technical details and requirements, financing preferences using checklist PV105

Create RFP Package
• Use standardized procurement documents with templates PV101, PV102, PV103, PV105 and customize as needed

Issue RFP & Evaluate Proposals
• Manage procurement process and perform a detailed review of proposals using evaluation matrix PV104

Contract Negotiation & Construction Planning
• Ensure continuity between proposed systems and pricing through the contracting process and develop realistic timeline for installations

LCOE Calculator
Solar System Specifications  (Form PV102, SHW102)

- Includes component-level specifications
  - Modules, inverters, monitoring
- System construction best practices
- Warranty requirements
- Post construction hand-off process

Utilize to ensure that pricing and system designs are based on latest national best practices, and to standardize proposal assumptions along with final contract terms.
Vendor Proposal Checklist (PV101)

- Outlines all proposal requirements
- Provided to facilitate vendor responses
- Can be adapted to incorporate unique needs
- Includes insurance and state-level requirements
- Describes use of pricing template
- Includes vendor attestation of proposal accuracy

*Provides guidance to vendors to ensure that all relevant information needed to evaluated proposals is received*
Pricing Worksheet Template (PV103, SHW103)

- Provides major input assumptions
- Standardizes pricing and performance comparisons
- Uses Levelized Cost of Energy model (LCOE)
- Analyzes both direct/capital purchase and Power Purchase Agreement (PPA)
- Can be expanded to include and compare multiple sites

Utilize to ensure that proposal pricing is captured in a consistent format for easy analysis and transparency to vendors
Evaluation Criteria (PV104)

- Evaluates 5 major categories
- Proposer Qualifications
- Technical Proposal
- Project Costs
- Implementation Plan and Schedule
- Contract Terms and Conditions
- Plus key pricing statistics

*Use to determine ranking for vendor proposals, can be tailored and re-weighted for specific buyer and facility needs*
Solar PV LCOE Calculator

• Use to evaluate pricing only from informal or unsolicited bids
• Not directly comparable between vendors without requiring minimum specifications and standard contract terms
• Captures all costing and performance inputs
• Calculates LCOE for comparison to current energy pricing
• Includes both direct/capital purchase and PPA
• Some edits may be required for certain situations
Solar Hot Water Evaluation

• Can combine Solar PV and Hot Water in procurement effort
• Capture and provide additional data on hot water usage
• Use form SHW102 for Solar Hot Water technical specifications
• Use form SHW103 for pricing submittal
• Can use form PV104 for evaluating proposals
Getting Started

- Review solar procurement “how-to” guide
- Collect information from your potential solar host sites
- Convene a working group to review and customize RFP
About Optony

Optony develops and deploys solar best practices across the entire project lifecycle for government agencies, schools and commercial organizations.

Working with clients across all phases of solar projects creates deep insight into true performance drivers which is used to reduce costs and improve performance at any stage in the process.

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