



## DRAFT REQUEST FOR PROPOSAL

To Finance, Engineer, Install, Commission and Maintain  
Solar Energy Installations on County Facilities and Lands

Date: June 18, 2018

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## **1 INTRODUCTION**

**1.1** The purpose of this RFP is to solicit proposals from and enter into contracts with qualified firms for solar installations on County facilities and land. The County intends to enter into contracts with one or more providers for each group of sites identified in this RFP. In addition, the County will reserve an option in each contract to add additional sites that will be assessed in the future. The County envisions having a master agreement with set terms and conditions for each contractor with the pricing, operational and maintenance requirement for each site set forth in an addendum pertaining to each individual site.

**1.2** Chatham County, North Carolina ("County") is seeking proposals from qualified firms interested in developing, financing, designing, constructing, operating and maintaining solar photovoltaic power systems ("PV systems") at various County facilities and on County land.

**1.2.1** The County locations that are identified and described in Exhibit 1 consist of County Facilities and Lands such as buildings/structures, parking lots and parks. These locations have been categorized into three groups:

- Group 1 - Solar system sizes anticipated to be less than 20kW which are systems that can be installed by all and do not require additional reviews by the energy provider.
- Group 2 - Solar system sizes anticipated to be less than 100kW which max out the Duke Energy Solar Rebate for non-profit organizations.
- Group 3 - Solar system sizes anticipated to be greater than 100kW

**1.3** The County anticipates selecting one or more firms to efficiently utilize the space for each County location and arrange for direct interconnection of the systems onto the energy distribution system through any combination of ground-mount, roof-mount, or canopy- mount arrays.

**1.4** The County expects that in addition to the sites identified and described in Exhibit 1 the County may identify additional sites for solar installation. The contract(s) that the County executes through this RFP process may be amended to include these additional sites depending on the County's assessment of the sites and performance of contractor with respect to the sites identified in this RFP.

**1.5** The County will consider various financing models depending on the site, including Lease Purchase Agreements.

**1.6** Selection shall be based on the criteria as set forth in Section 12 of this RFP. Once a final agreement(s) is negotiated, the recommended award(s) will be presented to the County Commissioners for final approval.

**1.7** Chatham County has the highest general obligation credit ratings of Aaa/AAA/AAA - "pure AAA" from the three national rating agencies, Moody's, Standard & Poor's, and Fitch Ratings. These ratings express the opinions of the national rating agencies as to the County's ability and willingness to pay debt service when it is due. In general, the credit rating analysis includes the evaluation of the relative strengths and weaknesses of four factors as they affect an issuer's ability to pay debt service: fiscal, economic, debt, and administrative/management. The rating agencies have consistently commented on the County's ability to carefully manage its expenditures to close budget gaps; maintain satisfactory levels of reserves for unforeseen situations, contingencies, and planned future disbursements; maintain strong fiscal controls and sound fiscal policies; and noting the strong capabilities of the County's fiscal and administrative management staff.

## **2 BACKGROUND INFORMATION**

**2.1** This project supports the County's Resolution Supporting a State and National Goal of 100% Clean Energy by 2050 which can be found at:  
<https://chathamnc.legistar.com/View.ashx?M=F&ID=5205174&GUID=D1B39A09-FCFA-4D5E-A2CA-F66436EE09A7>.

**2.2** In the event that there are differences in the information contained in the background material and the material in this RFP document, the provisions of this RFP document shall control.

## **3 MINIMUM QUALIFICATIONS**

In order to submit a proposal, the following minimum qualifications must be met.

### **3.1 ALL GROUPS:**

**3.1.1** The Prime Proposer or at least one of the Partners must have installed, operated, maintained, and monitored three or more solar projects in the three years preceding the date of this RFP, with at least 0.5 MW output total, and that are currently in commercial operations under its management.

**3.1.2** The Prime Proposer or at least one of the Partners must have current State required contractor licenses.

**3.1.3** The Prime Proposer or at least one of the Partners must have direct experience submitting an application for, and coordinating the available energy programs in the three years preceding the date of this RFP.

**3.1.4** If you are proposing the use of a Lease Purchase Agreement to finance any of the bidding installations that you propose, then the Prime Proposer or at least one of the Partners must have successfully completed construction and brought a facility on line under a Lease Purchase Agreement, including a Operations and Maintenance Agreement, in the three years preceding the date of this RFP.

### 3.2 GROUP 1 PROPOSERS ONLY:

**3.2.1** In addition to the above minimum qualifications, the Prime Proposer or at least one of the Partners must have completed at least three solar photovoltaic projects on three separate agreements with a minimum of 0.5 MW generating capacity each.

## 4 COMPLETE RFP

**4.1** The following Exhibits and Attachments are included with this RFP:

	Title
Exhibit 1	List and Description of Eligible Sites
Exhibit 2	PV Basis of Design
Exhibit 3	AB 2466 Fact Sheet
Exhibit 4	Sites selected for conceptual site plans (reference section 12.2.1)
Attachment A	Proposal Certification Form
Attachment B	Minimum Qualifications Form
Attachment C	Local/Small Business Enterprise Preference Request
Attachment D	Insurance Requirements

## 5 PROCUREMENT TIMELINE

Date	Event
September 17, 2018	RFP Released
October 1, 2018	Deadline for submitting Questions or Objections (reference RFP Sections 9 and 10). Note that questions may be submitted at any time prior to this date.
October 8, 2018	Non-mandatory pre-proposal conference:  Time and location will be posted in an addendum approximately one week prior to the meeting.  Time: Location:
October 22, 2018	County responds to supplier questions

Date	Event
November 5, 2018	<p>Proposal Submission Date – Deliver Proposals by 3:00 p.m. EST to:</p> <p>P.O. Box 1809, Pittsboro, NC 27312 Attention: Renee Paschal</p> <p>Note that late proposals shall not be accepted! (see Section 11 below)</p>

## **6 RFP CONTACT INFORMATION**

Chatham County  
Second floor, Courthouse Annex, 12 East Street  
Pittsboro, NC 27312  
Attn: Renee Paschal  
Phone: (919) 542-8200  
E-mail: [renee.paschal@chathamnc.org](mailto:renee.paschal@chathamnc.org)

## **7 HOW TO OBTAIN THIS RFP**

**7.1** This RFP may be downloaded from the County website at <http://www.chathamnc.org/business/current-bid-proposal-opportunities>.

**7.2** All addenda and notices related to this procurement will be posted on the County website. In the event that this RFP is obtained through any means other than the County website, the County will not be responsible for the completeness, accuracy, or timeliness of the final RFP document.

## **8 PROCEDURE FOR SUBMITTING QUESTIONS AND INQUIRIES**

Questions pertaining to this RFP should be submitted via e-mail to Lindsay Ray, Clerk to the Board of Commissioners, at [lindsay.ray@chathamnc.org](mailto:lindsay.ray@chathamnc.org). Please submit all questions by the deadline indicated in the procurement timeline. The County will provide a written response to all pertinent questions in the form of an Addendum.

## **9 OBJECTIONS**

Any objections as to the structure, content or distribution of this RFP including the Attachments and Exhibits thereto, must be submitted in writing to the RFP Contact listed above prior to the submission deadline for Objections and Questions. Objections must be as specific as possible, and identify the RFP Section number and title, as well as a description and rationale for the objection.

## **10 SUBMISSION OF PROPOSALS**

**10.1** Submit one original and six copies of your proposal clearly marked as follows: the outside of the box or package and the cover or title page of each proposal shall be labeled: RFP 2018-MIS-Solar, Solar Energy Installation on County Facilities and Lands. In addition, please submit your proposal in electronic format on a CD, DVD, or flash drive in pdf or MS Word format.

**10.2** Refer to the procurement timeline in Section 5 for due dates, times and delivery locations.

**10.3** All Proposals shall be submitted as hard copy bound documents. The Original hard copy version of the proposal will be considered the official proposal submission.

## **11 LATE PROPOSALS**

Late proposals shall be rejected and returned to the Proposer. This deadline is absolute and proposals received after the due date and time shall not be considered. Proposers must select a method of delivery that ensures proposals will be delivered to the correct location by the due date and time.

## **12 RESPONSE DOCUMENTS / SUBMISSION REQUIREMENTS**

In order to expedite the evaluation process, each Proposal shall be organized in accordance with this Section. Proposals that do not follow the specified format outlined below, or fail to provide the required documentation, may receive lower scores, or if found to be non-responsive, be disqualified.

### **12.1 EXPERIENCE**

**12.1.1** For the Group(s) you are bidding on, list solar projects of equal or greater size and complexity as the project described in this RFP. The projects must demonstrate that the firm, through previously completed work, has developed expertise to provide the equipment and services as required for this project. For each project, describe the scope of the project, financing methods employed, business partners (describe all parties involved in the transaction including, but not limited to, the financier, tax credit investor, project manager, and the customer/host site) and provide reference information including the name and current phone number of the Owner's Project Manager and the customer/host site.

**12.1.2** Provide any additional information that demonstrates your firm has the experience and background to meet the County's goals.

#### **12.1.3 NEGOTIATION TEAM**

Provide the names, titles, and roles of your team that will negotiate a final agreement with the County.



#### **12.1.4 PROJECT TEAM — PRIME**

Provide the staffing plan and qualifications of key team members who will be assigned to the project. This listing should detail each individual's specific experience on projects of this type. Also describe the ability of your firm's principals and staff to work with governmental agencies in general and with Chatham County project staff in particular.

#### **12.1.5 PROJECT TEAM — SUPPLIERS AND SUB-CONTRACTORS**

Provide the name of the Prime Contractor, and key sub contractors and suppliers that you would use on this project.

#### **12.1.6 PROPOSER CAPABILITIES**

Clearly identify the lines of authority, coordination, and limits of capacity for each member of the team. Identify essential management functions and how these functions are effectively integrated during each phase of the project. Delineate the role of Suppliers and Sub- contractors. Organizational charts and graphs may be included.

#### **12.1.7 PROJECT SCHEDULE**

Provide a project schedule showing the critical milestones your team will manage to complete system installation, commissioning acceptance testing, and final punch list closeout.

### **12.2 TECHNICAL PROPOSAL**

**12.2.1** Provide a conceptual site plan for each of the representative sites that are listed in Exhibit 4, Conceptual Site Plan Sites. Your plan should include a sketch or diagram of how your installed system will look at each representative project site. Include the proposed annual energy generation (kWh) on Attachment C, Solar Production Schedule, and the total system capacity for each representative project site.

**12.2.2** Provide information on how you will comply with Exhibit 2, PV Basis of Design and identify areas of specific interest specific to this Exhibit.

### **12.3 COST CONSIDERATIONS**

**12.3.1** Describe your financing plan for this project and how you will select a financing partner.

**12.3.2** Describe your bonding capacity to secure a performance bond (reference RFP sections 15.3 and 15.4).

**12.3.3** Provide evidence that proposer is a creditworthy company registered to conduct business in North Carolina and is in good standing.

**12.3.4** If you proposal includes a Lease Purchase Agreement, then provide an example of your Lease Purchase Agreement and Operations and Maintenance Agreement.

**12.3.5** Provide an example of other alternative financing structures.

**12.3.6** For your proposed financing structure please provide per kwh pricing for each year throughout the term.

**12.3.7** Include in your response any key assumptions that you are making.

## **12.4 OTHER**

Proposers may include other pertinent/additional information at a maximum of ten pages, double sided with minimum font size of 10. Please note that the County does not welcome large volumes of generic boilerplate information about the Proposer's firm, and may lower scores for irrelevant boilerplate information during proposal evaluations.

## **12.5 ATTACHMENTS**

**12.5.1** Attachment A, Proposal Certification – must be completed and signed

**12.5.2** Attachment B, Minimum Qualifications Form

**12.5.3** Attachment C, Local and Small Business Preference

Proposers requesting consideration for local and/or small business preference must provide this form. If this form is not included with your proposal, consideration for local and small business preference shall not be granted. This form may not be submitted at a later date.

**12.5.4** Attachment D, Insurance Requirements

## **13 REVIEW PROCESS AND EVALUATION CRITERIA**

### **13.1 PROPOSAL EVALUATION**

Proposal review and evaluation will be a two-phase process. Phase 1 will be a pre-qualification of the most qualified firms in each group based on the highest scoring proposals. The Phase 2 process will allow finalists to perform additional discovery on each of the sites they are bidding on such that a best and final proposal may be submitted that includes firm pricing for each site.

#### **13.1.1 Phase One – Pre Qualification**

**13.1.1.1** Proposals will be reviewed to determine if the minimum qualifications as described in Section 3 of this RFP are met. Proposals not meeting minimum qualifications will be disqualified from further consideration.

**13.1.1.2** The County may seek written clarification from any or all Proposers in order to better understand and evaluate the proposed solution. This process may not be used as an opportunity to submit missing documentation or to make substantive revisions to the original proposal.

**13.1.1.3** Responsive Proposals will be evaluated and scored by an evaluation team comprised of County staff. Proposals will be evaluated against the criteria described in the table below:

**Phase 1 Proposal Evaluation Weighting Criteria**

Criteria	Weight
Cost Considerations*	10%
Experience*	50%
Technical*	30%
Local Business Enterprise Preference	5%
Small Business Enterprise Preference	5%

\* PROPOSALS THAT FAIL TO SCORE AT LEAST ½ OR 50% OF THE AVAILABLE POINTS IN THESE EVALUATION CATEGORIES (EXPERIENCE, TECHNICAL AND COST CONSIDERATIONS) WILL BE DISQUALIFIED

**13.1.1.4** With the exception of points assigned to Local and Small Business Preference, proposers must score at least one-half, or 50%, of the total available points for each category that is being scored. Failure to do so will result in disqualification of that proposal from further consideration.

**13.1.1.5 Oral Presentations:** Based on the scores, the County will invite one or more Proposers for oral interviews for the purpose of confirming the Proposer's understanding of the County's objectives and requirements, addressing any questions or issues that the County may have, and meeting key members of the proposed negotiation team.

**13.1.2 Phase Two – Best and Final Offer**

**13.1.2.1** At the conclusion of Phase 1, the highest scoring proposals for each of the groups will be selected to participate in a Best and Final Offer process that may include but shall not be limited to job site visits, and additional question and answer rounds between the County and the finalists for the purpose of providing sufficient information to each finalist about the sites they are bidding on such that a Best and Final proposal with firm pricing may be submitted to the County. **Note that Phase 1 scores will not carry forward to Phase 2 (scoring is not cumulative). The final selection shall be based on the proposer achieving the highest Phase 2 point score.**

**13.1.2.2** The Best and Final Offer process may include oral interviews / presentations.

**13.1.2.3** At the discretion of the County Manager, the County may follow-up with finalists after their BAFO is received in order to seek additional clarification, prior to final scoring.

**13.1.2.4** 100% of the final selection shall be based on the Best and Final scores per the following evaluation and weighting criteria:

**Phase Two Evaluation Weighting Criteria**

Criteria	Weight
Cost	75%
Final Design /Technical Clarifications	15%
Local Business Enterprise Preference	5%
Small Business Enterprise Preference	5%

**13.1.2.5** Following final award, each selected proposer for each group will negotiate the final terms and conditions with the County on the basis of their proposal.

## **14 BASIS OF AWARD**

**14.1** The final recommendation to County Commissioners for award of contracts in each of the groupings will be based on the selection process set forth in Section 13. In the event that the County cannot successfully negotiate agreements with the selected proposer(s) it reserves the right to award to the next ranked proposer(s).

**14.2** The County reserves the right to accept an offer in- full, or in-part, or to reject all offers.

## **15 KEY COMMERCIAL TERMS**

### **15.1 INSURANCE REQUIREMENTS AND GUARANTEES**

**15.1.1** The selected Proposer(s), at Proposer's sole cost and expense and for the full term of the Agreement or any extension thereof, shall obtain and maintain, at a minimum, all of the insurance requirements outlined in Attachment E.

**15.1.2** Certificate of Insurance, as required, shall be provided to County prior to commencement of work on the contract.

### **15.2 WAGE REQUIREMENTS**

The successful Proposer and any of its subcontractors shall pay its employees performing installation work on the County contract a prevailing wage.

### **15.3 PERFORMANCE BOND**

A corporate surety bond or alternate surety such as letters of credit or self-insurance as agreed to by County - in a sum not less than the full value of the construction contract is required and must be furnished within 15 days after conclusion of negotiations.

### **15.4 PAYMENT BOND**

A corporate surety bond or alternate surety such as letters of credit or self insurance as agreed to by County in a sum not less than the full value of the construction contract is required to guarantee the payment of labor, materials, supplies, and equipment used to construct the Generating Facilities. The bond must be furnished within 15 days after award of the contract.

## **16 PROTESTS**

**16.1** The County shall announce the final award recommendation upon conclusion of a successfully negotiated contract. If an unsuccessful Proposer wants to dispute the award recommendation, the Protest must be submitted in writing to the County Manager's office no later than ten calendar days after announcement of the successful Proposer, detailing the grounds, factual basis and providing all supporting information. Protests will not be considered for disputes of proposal requirements and specifications, which must be addressed in accordance with Section 9. Failure to submit a timely written Protest will bar consideration of the Protest.

**16.2** The address for submitting protests is:

Attention: Renee Paschall  
P.O. Box 1809  
Pittsboro, NC 27312

## **17 GENERAL INFORMATION**

**17.1** Proposals shall be valid for a period of three months from the submittal date (due date) of the proposal.

**17.2** The County reserves the right to accept or reject any item or group(s) of items of a response. The County also reserves the right to waive any informality or irregularity in any proposal. Additionally, the County may, for any reason, decide not to award an agreement as a result of this RFP or cancel the RFP. The County shall not be obligated to respond to any proposal submitted, nor be legally bound in any manner by submission of the proposal.

**17.3** The County is not required to accept the lowest price proposal. Responses will be evaluated to determine the most advantageous proposal based on a variety of factors including but not limited to price, implementation costs, design quality, features, and performance.

**17.4** Statistical information contained in this RFP is for informational purposes only. The County shall not be responsible for the complete accuracy of said data.

**17.5** The County reserves the right to verify any information provided during the RFP process and may contact references listed or any other persons known to have contracted with the Proposer.

**17.6** The County may require financial statements for the last two fiscal years as certified by an independent Certified Public Accountant. Do not submit these documents unless they are requested.

## **18 GROUND FOR DISQUALIFICATION**

**18.1** Any Proposer who violates any items in section 18 will be subject to disqualification. The grounds for disqualification include:

**18.2** Contact regarding this procurement with any County official or employee or Evaluation team other than the RFP Contact or as otherwise designated in the RFP from the time of issuance of this solicitation until the end of the protest period.

**18.3** Evidence of collusion, directly or indirectly, among Proposers in regard to the amount, terms, or conditions of this proposal.

**18.4** Influencing any County staff member or evaluation team member throughout the solicitation process, including the development of specifications.

**18.5** Evidence of submitting incorrect information in the response to a solicitation or misrepresent or fail to disclose material facts during the evaluation process.

**18.6** Offering gifts or souvenirs, even of minimal value, to County officers or employees.

**18.7** Existence of any lawsuit, unresolved contractual claim or dispute between Proposer and the County.

**18.8** Evidence of Proposer's inability to successfully complete the responsibilities and obligations of the proposal.

**18.9** Proposer's default under any County agreement, resulting in termination of such Agreement.

## **19 ADDENDA AND INTERPRETATION**

**19.1** The County shall not be responsible for nor be bound by any oral instructions, interpretations or explanations issued by the County or its representatives. Should discrepancies or omissions be found in this RFP or should there be a need to clarify the RFP, requests for clarification may be sent via e-mail to the attention of the contact named in Section 6.

**19.2** Proposer requests for clarification shall be deliverable as stated in Section 8. Any County response to a request for clarification will be made in the form of an addendum to this RFP. All addenda shall become part of this RFP.

## **20 PROPOSAL SUBMISSION**

**20.1** This RFP does not commit the County to pay any costs incurred in the submission of a proposal or in making any necessary studies or designs for the preparation thereof, nor the purchase or contract for the services.

**20.2** After acceptance of the successful proposal by the County, the successful Proposer(s) shall be obligated to enter into an agreement consistent with the proposal submitted.

## **21 EXAMINATION OF PROPOSED MATERIAL**

The submission of a proposal shall be deemed a representation and certification by the Proposer that they have investigated all aspects of the RFP, that they are aware of the applicable facts pertaining to the RFP process, its procedures and requirements, and that they have read and understood the RFP. No request for modification of the statement shall be considered after its submission on grounds that Proposer was not fully informed as to any fact or condition.

## **22 CODE ADHERENCE, PERMITS AND FEES**

Proposer shall agree to abide by all laws, rules and regulation of the United States, State of North Carolina, Chatham County, securing all necessary licenses and permits in the connection with resulting contract at no additional cost to the County.

## **23 TERMS AND CONDITIONS OF AGREEMENT**

**23.1** As requested in RFP Section 12.1.4, all Proposers are invited to submit Agreement Terms and Conditions as part of their proposal.

## **24 LOCAL AND SMALL BUSINESS PREFERENCE**

In order for the Proposer to be eligible for local and/or small business preference, the Proposer must complete Attachment E, Request for Contracting Preference for Local and Small Businesses. If the Proposer fails to complete this form and submit it with the proposal, the Proposer will be denied consideration for local/small business preference. This information cannot be submitted later.

## **25 PUBLIC NATURE OF PROPOSAL MATERIAL**

**25.1** All correspondence with the County including responses to this RFP will become the exclusive property of the County and will become public records under the North Carolina Public Records Law. All documents that you send to the County will be subject to disclosure if requested by a member of the public. There are a very limited number of narrow exceptions to this disclosure requirement.

**25.2** Therefore, any proposal which contains language purporting to render all or significant portions of their proposal “Confidential”, “Trade Secret” or “Proprietary”, or fails to provide the exemption information required as described below will be considered a public record in its entirety.

**25.3** Do not mark your entire proposal as “confidential”.

**25.4** The County will not disclose any part of any proposal before it announces a recommendation for award, on the ground that there is a substantial public interest in not disclosing proposals during the evaluation process. After the announcement of a recommended award, all proposals received in response to this RFP will be subject to public disclosure. If you believe that there are portion(s) of your proposal that are exempt from disclosure under the Public Records Law, you must mark it as such and state the specific provision in the Public Records Law which provides the exemption as well as the factual basis for claiming the exemption. For example, if you submit trade secret information, you must plainly mark the information as “Trade Secret” and refer to the appropriate section of the Public Records Law that provides the exemption as well as the factual basis for claiming the exemption.

**25.5** Although the North Carolina Public Records Law recognizes that certain confidential trade secret information may be protected from disclosure, the Chatham County may not be in a position to establish that the information that a Proposer submits is a trade secret. If a request is made for information marked “Confidential”, “Trade Secret” or “Proprietary”, the County will provide Proposers who submitted the information with reasonable notice to seek protection from disclosure by a court of competent jurisdiction.

## **26 NON-DISCRIMINATION/NON-PREFERENTIAL TREATMENT**

The successful Proposer agrees that there shall be no discrimination against, or segregation of, any person, on account of race, sex, color, age, religion, sexual orientation, actual or perceived gender identity, disability, ethnicity, national origin, marital status, or family status, in connection with or related to the performance of Chatham County contracts.

## **27 COUNTY BUSINESS TAX**

The Proposer(s) shall be required to comply with the County Business Tax prior to any commencement of work.



## EXHIBIT 1: LIST AND DESCRIPTION OF ELIGIBLE SITES

**Group 1: Solar system sizes anticipated to be less than 20kW**

Facility Name	Site Address	Rate Schedule	Energy Use (kWh)	Roof Area (s.f.)	Parking Lot and other (s.f.)	Shading Issues/ Other Notes
		Total				

Group 2: Solar system sizes anticipated to be less than 100kW

Facility Name	Site Address	Rate Schedule	Energy Use (kWh)	Roof Area (s.f.)	Parking Lot and other (s.f.)	Shading Issues/ Other Notes
		Total				

**Group 3: Solar system sizes anticipated to be greater than 100kW**

Facility Name	Site Address	Rate Schedule	Energy Use (kWh)	Roof Area (s.f.)	Parking Lot and other (s.f.)	Shading Issues/ Other Notes
SCHOOLS						
Bennett						
Bonlee						
Chatham Central						
Chatham Middle						
Horton						
J.S. Waters						
Jordan-Matthews						
Margaret B. Pollard Middle						
Moncure						
North Chatham						
Northwood						
Perry Harrison						
Pittsboro						
SAGE Academy						
Science & Engineering						
Siler City						
Silk Hope						
Virginia Cross						
		Total				

## **Exhibit 2**

### **PV Basis of Design**

The requirements of this section shall be in addition to all applicable codes and laws.

#### **Electrical**

- All wiring to be installed in conduit.
- No overhead wiring (e.g. connecting canopy to building).
- Surface mount on building face only at express written consent of owner.
  - Where allowed surface mount conduit shall be strapped to prevent movement.
  - Where allowed surface mount conduit shall be installed to minimize visibility, including installation in new or existing raceways, painting.
- Electrical pathways shall be coordinated with owner to ensure operational needs such as travel ways are not compromised.
- Installer shall provide one empty electrical conduit stubbed at the base of the canopy section and run parallel to the installer's conduit to its endpoint. Conduit shall be 2" diameter or equivalent in size to installers smallest size electrical conduit.

#### **Roofing**

- Rooftop pathways shall be protected with walking mats during construction and permanently following construction.
- Roof penetrations shall be coordinated with owner. Installer shall contract with owner's roofing contractor for roofing at installer's expense.
- The existing roof drainage shall be maintained all the time.

#### **General**

- All work shall maintain architectural integrity of facility.
- The color and finishes of the PV and supporting structure systems shall be compatible and consistent with the original building design intent as well as with the surrounding environment.
- For the PV systems not mounted on buildings, considerations shall be given such that the main features of the building are not obscured.
- Other elements of the PV systems, i.e. conduits and equipment, shall be installed inconspicuously, for instance, hidden in wall or ceiling spaces.
- Coordinate with the owner for approval of the design concept at the beginning of the design phase.
- Installs shall allow for walking space and clearances for maintenance and inspection activities.
- Exposed metals shall be corrosion resistant or painted per owners specifications.
- Canopy structures in parking lots shall be center post cantilever construction.

- Canopy structures shall be designed to provide vertical clearance appropriate for site per owner direction.
- Power shutdowns shall be minimized and shall occur outside of regular facility operating hours.
- Installation shall provide for lighting of publicly accessible areas at a level equivalent to pre-existing conditions.

**EXHIBIT 4**  
**Sites Selected for Submitting Conceptual Plans**

Group 1 – Solar system sizes <20kW

Group 2 – Solar system sizes <100kW

- County Buildings - Animal Shelter Expansion and Renovation

Group 3 – Solar system sizes >100kW

- Community College - Health Sciences Building
- Schools - Chatham Grove Elementary School
- Schools - New Central Services Building
- Schools - Seaforth High School

## ATTACHMENT A – PROPOSAL CERTIFICATION

**NO PROPOSAL SHALL BE ACCEPTED WHICH HAS NOT BEEN SIGNED IN INK IN THE APPROPRIATE SPACE BELOW**

**Proposing firm is submitting a proposal for the following groups as described in RFP Section 1 (please check all that apply):**

☐ Group 1

☐ Group 2

☐ Group 3

<u>Proposing Firm Name:</u>		
<u>Address:</u>		
<u>Telephone:</u>		
<u>Email:</u>		
<u>Contact person name and title:</u>		

### PROPOSER REPRESENTATIONS

1. Proposer did not, in any way, collude, conspire or agree, directly or indirectly, with any person, firm, corporation or other Proposer in regard to the amount, terms, or conditions of this proposal.
2. Proposer additionally certifies that neither proposer nor its principals are presently disbarred, suspended, proposed for disbarment, declared ineligible or voluntarily excluded from participation in this transaction by any federal department or agency, any North Carolina State agency, or any local governmental agency.
3. Proposer acknowledges that all requests for deviations, exceptions, and approved equals are enclosed herein and that only those deviations, exceptions, and approved equals included in the RFP document or permitted by formal addenda are accepted by the County.
4. Proposer did not receive unauthorized information from any County staff member or County Consultant during the Proposal period except as provided for in the Request for Proposal package, formal addenda issued by the County, or the pre-proposal conference.
5. Proposer hereby certifies that the information contained in the proposal and all accompanying documents is true and correct.

6. Please check the appropriate box below:

☐ If the proposal is submitted by an individual, it shall be signed by him or her, and if he or she is doing business under a fictitious name, the proposal shall so state.

☐ If the proposal is made by a partnership, the full names and addresses of all members and the address of the partnership, the full names and addresses of all members and the addresses of the partnership, the full names and addresses of all members and the address of the partnership shall be stated and the proposal shall be signed for all members by one or more members thereof.

☐ If the proposal is made by a corporation, it shall be signed in the corporate name by an authorized officer or officers.

☐ If the proposal is made by a limited liability company, it shall be signed in the corporate name by an authorized officer or officers.

☐ If the proposal is made by a joint venture, the full names and addresses of all members of the joint venture shall be stated and the bid shall be signed by each individual.

**By signing below, the submission of a proposal shall be deemed a representation and certification by the Proposer that they have investigated all aspects of the RFP, that they are aware of the applicable facts pertaining to the RFP process, its procedures and requirements, and that they have read and understand the RFP.**

**NO PROPOSAL SHALL BE ACCEPTED WHICH HAS NOT BEEN SIGNED IN INK IN THE APPROPRIATE SPACE**

Authorized Representative Name (sign name):	
Authorized Representative Signature (print name):	
Authorized Representative Title (print title):+	
Complete additional signatures below as required per # 6 above	
Authorized Representative Name (sign name):	
Authorized Representative Signature (print name):	
Authorized Representative Title (print title):	
Authorized Representative Name (sign name):	
Authorized Representative Signature (print name):	
Authorized Representative Title (print title):+	



## **Attachment B – Minimum Qualifications Form**

In order to submit a proposal, the following minimum qualifications must be met: Please complete this form by providing the requested information.

### **All Groups:**

1. The Prime Proposer or at least one of the Partners must have installed, operated, maintained, and monitored three or more solar projects in the three years preceding the date of this RFP, with at least 0.5 MW output total, and that are currently in commercial operations under its management.

**Please indicate the partner that meets this requirement and list three projects and include the name and complete description of the project, customer name, contact names, and contact phone number.** NOTE: EACH REFERENCE MUST BE FOR A DIFFERENT PROJECT WITH A SEPARATE AGREEMENT FOR EACH PROJECT. YOU MAY NOT MEET THE THREE REFERENCE REQUIREMENT BY SUBMITTING MULTIPLE CONTACTS FOR THE SAME PROJECT OR MULTIPLE PROJECTS ON THE SAME AGREEMENT.

2. The Prime Proposer or at least one of the Partners must have current State required contractor licenses.

**Please indicate the partner that has the necessary licenses to perform this work, and state what the license is. If this requirement cannot be verified on the North Carolina State Contractors License Board website, then please provide a copy of the license.**

3. If you are proposing the use of a Lease Purchase Agreement to finance any of the bidding installations that you propose, then the Prime Proposer or at least one of the Partners must have successfully completed construction and brought a facility on-line under a Lease Purchase Agreement, including a Operations and Maintenance Agreement, in the three years preceding the date of this RFP.

**Indicate the Partner that meets this requirement and list the customer name, contact name, complete project description, and date of project completion.**

**For Group 3 proposers only:**

1. In addition to the above minimum qualifications, the Prime Proposer or at least one of the Partners must have completed at least three solar photovoltaic projects on three separate agreements with a minimum of 500 kwh generating capacity each.

**Please indicate the Partner that meets this requirement, and list three projects and include the name and complete description of the project, customer name, contact names, contact phone number.** NOTE: EACH REFERENCE MUST BE FOR A DIFFERENT PROJECT WITH A SEPARATE AGREEMENT FOR EACH PROJECT. YOU MAY NOT MEET THE THREE REFERENCE REQUIREMENT BY SUBMITTING MULTIPLE CONTACTS FOR THE SAME PROJECT OR MULTIPLE PROJECTS ON THE SAME AGREEMENT.

## ATTACHMENT C – LOCAL AND SMALL BUSINESS PREFERENCE

Chatham County Request for Contracting Preference for Local and Small Businesses			
<p>A preference for Local and Small Businesses in the procurement of contracts for supplies, materials and equipment and for general and professional consulting services is included in evaluation criteria. The amount of the preference depends on whether the vendor qualifies as a Local Business Enterprise* or Small Business Enterprise** and whether price has been chosen as the determinative factor in the selection of the vendor.</p> <p>In order to be a Local Business Enterprise (LBE) you must have an office in Chatham County with at least one employee. If you qualify as an LBE you can also qualify as a Small Business Enterprise (SBE) if the total number of employees (<i>regardless of where they are located</i>) of your firm is 35 or fewer.</p> <p>There are two ways in which the preference can be applied. In procurements where price is the determinative factor (<i>i.e. there are not a variety of other factors being considered in the selection process</i>) the preference is in the form of a credit applied to the dollar value of the bid or quote. For example, a non-local vendor submits a quote of \$200 per item and a LBE submits a quote of \$204 per item. The LBE receives a 2.5% credit on the quote, which equals approximately \$5 and thus the LBE will win the award because the quote is evaluated as if it had been submitted as \$199.</p> <p>In procurements where price is not the determinative factor such, as an RFP, typically a variety of factors are evaluated to determine which proposal best meets the County's needs. In procurements such as these, a qualified LBE will be given 5% and a qualified SBE will be given an additional 5% of the total <b>points</b> in the <b>scoring</b>.</p>			
The following determinations have been made with respect to this procurement: (for official use only)			
Type of Procurement	<input type="checkbox"/> Bid	<input type="checkbox"/> Request for Quote	<input checked="" type="checkbox"/> Request for Proposal
Type of Preference	<input type="checkbox"/> Price is Determinative	<input checked="" type="checkbox"/> Price is Not Determinative	
Amount of Preference	LBE preference = 2.5% of Cost SBE preference = 2.5% of Cost	LBE preference = 5% of Points SBE preference = 5% of Points	
In order to be considered for any preference you must fill out the following statement(s) under penalty of perjury.			
Business Name			
Business Address			
Telephone No.			
Type of Business	<input type="checkbox"/> Corporation	<input type="checkbox"/> LLC	<input type="checkbox"/> LLP
	<input type="checkbox"/> General Partnership	<input type="checkbox"/> Sole proprietorship	<input type="checkbox"/> Other (explain)
<p><b>*LOCAL BUSINESS ENTERPRISE (LBE) PREFERENCE</b></p> <p>In order to qualify as an LBE you must provide the following information:</p> <p>Current Tax Identification Number <span style="float: right; border: 1px solid black; width: 150px; height: 20px;"></span></p> <p>Address of Principal Business Office or Regional, Branch or Satellite Office with at least one employee located in Chatham County: <span style="float: right; border: 1px solid black; width: 250px; height: 40px;"></span></p>			
<p><b>**SMALL BUSINESS ENTERPRISE PREFERENCE (SBE)</b></p> <p>In order to qualify as an SBE you must qualify as an LBE and have 35 or fewer employees. This number is for your entire business --NOT just local employees, or employees working in the office address given above.</p> <p>Please state the number of employees that your Business has: <span style="float: right; border: 1px solid black; width: 100px; height: 20px;"></span></p>			
<p>Based upon the forgoing information I am requesting that the Business named above be given the following preferences (<i>please check</i>):</p> <p style="text-align: center;"><input type="checkbox"/> Local Business Enterprise      <input type="checkbox"/> Small Business Enterprise</p>			
I declare under penalty of perjury that the information supplied by me in this form is true and correct.			
Executed at: _____, North Carolina			
Date: _____			
Signature: _____			
Print name: _____			

## ATTACHMENT D - INSURANCE REQUIREMENTS

Lessee shall procure and maintain for the duration of this Lease insurance against claims for injuries to persons or damages to property, which may arise from or in connection with this Leases Authorized Activities, and use of the Site. The cost of such insurance shall be borne by the Lessee.

**A. Minimum Scope of Insurance.** Coverage shall be at least as broad as:

1. Insurance Services Office Commercial General Liability coverage including products and completed operations, unmodified contractual liability, XCU (Explosion, Collapse and Underground), fire legal liability; and
2. The coverage must include automobile liability, hired autos and non-owned autos; and
3. Workers' Compensation insurance as required by the State of North Carolina and Employer's Liability insurance (for Lessees employees); and
4. Property insurance against all risks of loss to any Lessee improvements or betterments; and
5. Professional Liability Errors and Omissions insurance for all professional services.

**B. Minimum Limits of Insurance.** Lessee shall maintain limits no less than:

1. General Liability: \$5,000,000 per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be twice the required occurrence limit. Including \$100,000 Fire Legal Liability; and
2. Automobile Liability: \$1,000,000 per accident for bodily injury and property damage; and
3. Workers' Compensation and Employers Liability: Workers' Compensation limits as required by Labor code of the State of North Carolina and Employers Liability limits of \$1,000,000 per accident; coverage shall be endorsed to state carrier waives its right of subrogation against Chatham County, its officials employees, agents and operators; and
4. Property Insurance: Full replacement cost with no coinsurance penalty provision; and
5. Professional Liability Errors and Omissions Insurance \$2,000,000 each occurrence/aggregate limit; and

**C. Deductibles and Self-Insured Retentions.** Any deductibles or self-insured retentions must be declared to and reviewed and approved in advance by County. At the option of County Manager, either: the insurer shall reduce or eliminate such deductibles or self-insured retentions with respect to County, its officers, officials, employees and volunteers; or Lessee shall procure a bond guaranteeing payment of losses and related investigations, claim administration and defense expenses in an amount specified by County.

**D. Other Insurance Provisions.**

The general liability policy is to contain, or be endorsed to contain the following provisions:

1. County, its officers, officials, employees and volunteers are to be covered as additional insureds with respect to: liability arising out of activities performed by, or on behalf of, Lessee, Premises and/or space owned, occupied or used by Lessee, or automobiles owned, leased, hired or borrowed by Lessee. The coverage shall contain no special limitations on the scope of protection afforded to County, its officers, officials, employees or volunteers.
2. Lessee's insurance coverage shall be primary insurance with respect to County, its officers, officials, employees, and volunteers. Any insurance or self-insurance maintained by County, its officers, officials, employees or volunteers shall be in excess of Lessee's insurance and shall not contribute with it.
3. Any failure to comply with reporting or other provisions of the policies including breaches of warranties shall not affect coverage provided to County, its officers, officials, employees or volunteers.
4. Coverage shall state that Lessee's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.
5. Insurance afforded by this policy shall apply to liability assumed by the insured under written contract with the Agency/County.
6. Coverage shall contain a waiver of subrogation in favor of Chatham County, its officials, employees, agents and contractors

All coverages

1. Each insurance policy required by this clause shall be endorsed to state that coverage shall not be suspended, voided, canceled, reduced in coverage or in limits except after thirty (30) days prior written notice by certified mail, return receipt requested, has been given to County.

**E. Acceptability of Insurers.** Insurance is to be placed with insurers acceptable to County Manager.

**F. Verification of Coverage.** Lessee shall furnish County with certificates of insurance and with original endorsements affecting coverage required by this clause. The certificates and endorsements for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf. All endorsements are to be received and approved by County before work occupancy or activity commences. As an alternative to County's forms, Lessee's insurer may provide complete, certified

copies of all required insurance policies, including endorsements affecting the coverage required by these specifications.

Proof of insurance shall be mailed to the following address:

Lindsay Ray  
Chatham County  
P.O. Box 1809  
Pittsboro, NC 27312

with a copy mailed to:

**G. Subcontractors.** Lessee shall include all subcontractors as insureds under its policies or shall obtain separate certificates and endorsements for each subcontractor.

**H. Review of Coverage.** These insurance requirements shall be subject to periodic review by County Manager. Should the County Manager require any change in any coverage such change shall be communicated in writing to Lessee and Lessee shall comply with the said change within thirty (30) days of the date of receipt of the notice.