



## **REQUEST FOR PROPOSALS**

**for**

### **Solar Now! Regional Outreach**

**PROPOSALS DUE: August 8, 2011 by 4 p.m.**

**Electronic Submission shall include Proposer's Name and Project Title in e-mail subject line.**

**Submit one (1) original electronic copy of the Proposal (in PDF file format) to:**

lee.rahr@portlandoregon.gov  
City of Portland  
Bureau of Planning and Sustainability  
1900 SW 4<sup>th</sup>, Suite 7100  
Portland, OR 97201

**Refer questions to:**

Lee Rahr  
Phone: (503) 823-7581  
E-mail: lee.rahr@[portlandoregon.gov](mailto:lee.rahr@portlandoregon.gov)

## **Section I – Funding Opportunity Description**

### **Solar Now! Regional Outreach**

#### **Summary**

The objective of the Solar Now! Regional Outreach funding opportunity is to achieve measurable increases in market demand for solar energy in Oregon. The Portland Bureau of Planning and Sustainability (BPS) seeks to partner with local jurisdictions, neighborhoods and community-based organizations to educate Oregon citizens about solar energy; increase the number and installed capacity of solar energy systems in Oregon; and streamline local permitting processes.

Funding is available through a grant awarded to the City of Portland by the US Department of Energy (DOE) under the Solar America Cities: Special Projects program. This program was funded through the American Recovery and Reinvestment Act of 2009 (ARRA). Solar Now! Regional Outreach is one of four objectives that Portland is obligated to deliver as part of the Solar America Cities: Special Projects grant.

BPS plans to award up to \$41,000 to support this work. BPS anticipates making between four and six awards, ranging from \$2,000-\$10,000. Funding will be allocated monthly on a reimbursement basis, no later than March 31, 2012. Every dollar reimbursed by BPS, must be matched by the recipient organization.

#### **Background**

Since 2007, the City of Portland has collaborated with DOE, Energy Trust of Oregon, the Oregon Department of Energy and Solar Oregon to transform the market for solar energy. As a result of this collaboration, the Solar Now! campaign was created to leverage skills and resources from each of the partners while creating a unified market presence.

Accomplishments of Solar Now! include:

- Comprehensive solar educational content for residents and businesses.
- A series of free monthly workshops available to the residential and business communities.
- Free, expert technical assistance about solar for interested citizens and installers.
- A replicable brand and solar marketing communications toolkit.
- Support for the neighborhood-based group purchasing campaigns known collectively as Solarize Portland.
- Streamlined municipal regulations and permitting processes that provide clarity for installers and reduce installation costs for consumers.
- Sponsorship for Pendleton, Sherman County and Hood River (represented by the Columbia Gorge Earth Center) to join the Solar Now! campaign network.

- Solar Now! University, a train-the-trainer conference to share practical knowledge and expertise with Pendleton, Sherman County, Hood River and other eastern Oregon communities.

Solar Now! Regional Outreach builds upon these successes and accomplishments. BPS seeks to provide continued support to Portland neighborhoods and rural Oregon communities to further the goal of solar market transformation.

Successful proposers will become part of Oregon’s Solar Now! campaign, with access to the combined expertise and resources of each of the participating organizations and jurisdictions.

### **Required Services and Scope of Work**

BPS is seeking to partner with local governments, community-based organizations or teams of such to:

1. Develop a local solar market transformation strategy or approach based on best practices emerging from the Solar America Cities network;
2. Expand or develop neighborhood-based group purchasing campaigns like Solarize Portland and Solarize Pendleton;
3. Create solar energy education and outreach offerings for residents and businesses;
4. Provide customer service and technical assistance to residents and businesses wishing to go solar;
5. Develop marketing materials and messages to promote solar energy;
6. Adopt best practices with respect to local permitting processes and land-use regulations that can make it less expensive and easier to install solar energy systems.

Successful Proposers will receive funding to support some combination or all of these solar program activities. Grant funds can also be used to cover costs of participating in Solar Now! University 2011 (scheduled for September 22-24 in Roseburg, Oregon).

### **Work Performed by the City**

BPS has assigned a project manager to oversee the successful Proposer’s work. BPS will provide support to the successful Proposer as needed, including but not limited to:

- Sharing general best practices from the [Solar America Cities network](#);
- Sharing best practices with respect to solar codes and standards;
- Providing access to solar educational content; and
- Providing access to customizable solar marketing and communications tools.

## **Section II – Award Information**

### **A. Type of Award**

The Portland Bureau of Planning and Sustainability will enter into a Grant Agreement with each successful Proposer. (See Attachment A)

### **B. Estimated Funding**

BPS plans to award up to \$41,000 to support this work. BPS anticipates making between four and six awards. Funding will be allocated quarterly on a reimbursement basis.

### **C. Award size**

The Portland Bureau of Planning and Sustainability anticipates the maximum grant award to be \$10,000 and the minimum to be \$2,000.

### **D. Period of performance.**

The grant period of performance ends March 31, 2012. Grant activities must be completed and invoiced for by March 31, 2012.

## **Section III – Eligibility**

### **A. Eligibility**

BPS is seeking proposals from local governments, community-based organizations or teams of such in the state of Oregon.

### **B. Cost-sharing**

BPS requires cost-share in order to ensure that applicants dedicate time and resources to achieve desired objectives. In-kind support is an acceptable form of cost-sharing.

Applications must identify sources and amounts of cost share proposed. Applicants will be required to demonstrate a 50 percent cost share. This is a dollar for dollar match. For example, an Applicant who requests \$6,000 in funding must demonstrate at least \$6,000 in additional resources, for a total project budget of at least \$12,000. Cost share funds may not come from federal sources.

Applicants are required to maintain records of all project costs claimed as cost share, including in-kind costs, as well as record of costs to be reimbursed by BPS.

## **Section IV – Application and Submission Information**

### **A. Content and Application**

Applicants must submit the following documents:

- 1) Cover letter

The cover page should include project title, contact person and information and a brief description of project narrative.

## 2) Project Narrative

The project narrative should not exceed 5 pages. The Proposer should write a clear and concise description of the project objectives and activities that will take place during the grant period. Particular attention should be paid to describing policies, plans, strategies, methods and activities that will increase rooftop solar energy system installations rates. If a local jurisdiction is the primary Proposer, BPS strongly encourages a discussion of permitting constraints and ways in which permitting barriers might be reduced.

The project narrative must include the following:

### a. Project Objectives

Concise description of primary project objectives.

### b. Project Timetable

Project timeline should outline activities and action items with corresponding dates.

### c. Project Partners

List key partners and discuss partner participation roles and responsibilities.

## 3) Budget

The proposal shall include the Proposer's true estimated cost to perform the work irrespective of the City's anticipated grant funding. Please include in-kind, partner funding or other leveraged resources. This funding opportunity requires a 50% cost-share from the Proposer, meaning the Proposer must match each dollar of grant funding with one dollar of its own resources.

## 4) Team qualifications and experience

Demonstrate experience in community organizing, education and outreach. Discuss any existing local energy policies, plans, or other local sustainability initiatives. Provide a resume for each key person proposed including experience on similar or related projects. Please include staff members responsible for quarterly and final reports. List percentage of staff time devoted to the project.

## 5) Diversity in Employment

BPS is committed to reducing disparities and to advancing diversity, equity and inclusion of historically disadvantaged and underrepresented communities in the work that the Bureau undertakes. Please describe the efforts your organization has undertaken to reduce disparities and further equity, diversity and inclusion in the Proposer's organization and community. Please indicate how disparities, diversity,

equity and inclusion will be addressed in the work done as part of Solar Now! Regional Outreach.

6) Letters of Support

Please include two references, and any other information pertinent to the project or work to be performed. References must include the contact person's name, agency, address, phone number, their role in the project name of the project, and when the work was done.

7) Supporting Information

Solar Now! Regional Outreach is being made available with funds from the American Recovery and Reinvestment Act of 2009 (ARRA). Successful Proposer will be asked to submit a Dun and Bradstreet's Data Universal Number ("DUNS"), and Central Contractor Registration ("CCR") number. Both numbers are requirements of federal reporting and tracking.

**B. Proposal Submittal**

1) Proposal Clarifications

Questions and requests for clarification regarding this Request for Proposal must be directed in writing or via email to the person listed below. **The deadline for submitting such questions/clarifications is July 25, 2011.** An addendum will be issued no later than 72 hours prior to the proposal due date to all recorded holders of the RFP if a substantive clarification is in order.

Contact: Lee Rahr  
Bureau of Planning and Sustainability  
1900 SW 4<sup>th</sup> Ave., Suite 7100  
Portland, Oregon 97201

E-mail: lee.rahr@portlandoregon.gov  
Phone: (503) 823-7581

2) Proposal

Electronic proposals must be received no later than the date and time, and at the location specified on the cover of this solicitation. It is the Proposer's responsibility to ensure that proposals are received prior to the specified closing date and time, and at the location specified. Proposals received after the specified closing date and/or time shall not be considered and will be returned to the Proposer unopened. The City shall not be responsible for the proper identification and handling of any proposals submitted to an incorrect location.

Proposals must be clear, succinct and not exceed 5 pages. Section dividers, title page, and table of contents do not count in the overall page count of the proposal. Proposers

who submit more than the pages indicated may not have the additional pages of the proposal read or considered.

All submittals will be evaluated on the completeness and quality of the content. Only those Proposers providing complete information as required will be considered for evaluation. The ability to follow these instructions demonstrates attention to detail.

## Section V – Application Review Information

### A. Evaluation Criteria

Each proposal shall be evaluated on the following evaluation criteria, weighting and maximum points, as follows:

Criteria		Maximum Score
1)	Cover Letter	0
2)	Project Narrative	25
3)	Budget	15
4)	Team Qualifications and Experience	25
5)	Diversity in Employment	15
6)	Letters of Support	20
7)	Supporting Information	0
Total Points Available		100

### B. Proposal Review

An evaluation review committee will be appointed to evaluate the proposals received. For the purpose of scoring proposals, each committee member will evaluate each proposal in accordance with the criteria and point factors listed above. The evaluation committee may seek outside expertise, including but not limited to input from technical advisors, to assist in the evaluation process.

The successful Proposer shall be selected by the following process:

- 1) An evaluation committee will be appointed to evaluate submitted written proposals.
- 2) The committee will score the written proposals based on the information submitted according to the evaluation criteria and point factors.
- 3) The committee will require a minimum of 5 working days to evaluate and score the written proposals.
- 4) A short list of Proposers, based on the highest scores, may be selected for oral interviews if deemed necessary. BPS reserves the right to increase or decrease the number of Proposers on the short list depending on the scoring and whether the Proposers have a reasonable chance of being awarded a contract.
- 5) If oral interviews are determined to be necessary, the scores from the written proposals will be considered preliminary. Final scores, based on the same evaluation criteria, will be determined following the oral interviews if deemed

necessary.

All communications shall be through the contact(s) referenced on the cover page of the RFP. At the City's sole discretion, communications with members of the evaluation committee, other City staff or elected City officials for the purpose of unfairly influencing the outcome of this RFP may be cause for the Proposer's proposal to be rejected and disqualified from further consideration.

## **Section VI – Award Administration**

### **A. Deliverables and Schedule**

If the Proposer is successful and wins an award, the following deliverables and schedule for this project will be provided to the grant administrator:

- 1) Complete a grant agreement (included herein as Exhibit A) and the necessary insurance documents with the City of Portland Bureau of Planning and Sustainability within 30 days of award.
- 2) Submit a program work plan no later than 30 days after project award.
- 3) Submit quarterly reports. Reported metrics will be determined based on each grant agreement, but are likely to include number of trainings, number of workshops, number of installations, installed capacity (in kW). Quarterly Reports due to Bureau of Planning and Sustainability on:
  - i. October 15, 2011
  - ii. January 15, 2011
- 4) Submit monthly reimbursement receipts with relevant payroll recipients or backup documentation.
- 5) Report all hours worked of all participating staff included in quarterly report.
- 6) Submit final narrative report including relevant metrics by March 31, 2012, the end of the period of performance.

All deliverables and resulting work products from this contract will become the property of the City of Portland.

## Exhibit A – Grant Agreement Template

### Solar Now! Regional Outreach *Grant Agreement*

This agreement contains the terms and conditions of a Grant issued by the City of Portland's Bureau of Planning and Sustainability ("BPS") to \_\_\_\_\_ ("Grantee"). BPS and Grantee are referred to together as the "parties." Work performed under this grant agreement is funded with funds appropriated through the American Recovery and Reinvestment Act of 2009 ("ARRA"). Funding for this grant award is outlined under BPS' Statement of Project Objectives with the U.S. Department of Energy, Solar America Cities Special Projects award. The Grantee is acting as a sub-recipient of the U.S. Department of Energy under BPS' Neighborhood Solar Initiative (DE-EE0002069) award. By signing the "agreement," the Grantee agrees to the reporting requirements outlined below. The below reporting requirements will enable BPS to meet its' responsibilities outlined in the Statement of Project Objectives with the U.S. Department of Energy, Solar America Cities Special Projects award which can be made available to Grantee upon request.

#### TERMS AND CONDITIONS:

- 1) **GRANT AWARD, AMOUNT, AND USE** BPS agrees to pay Grantee \$ \_\_\_\_\_ ("Total Grant Amount") to provide financial assistance to the City of \_\_\_\_\_ in its' role as a Solar Now! community partner. Grant funding will partially fund Grantee's expenses incurred for Solar Now project coordination. Project funds will include but not be limited to: expenses related to education and outreach such as venue rentals, printing, workshop scheduling and management, project management and design, and volunteer recruitment and management. Grantee shall use the Grant funds for executing the above tasks necessary for the successful delivery of a Solar Now! educational and outreach campaign.
- 2) **VERIFICATION AND PAYMENT** Payment of \$ \_\_\_\_\_ will be made by BPS to Grantee after this grant agreement has been signed. Grantee will submit quarterly reports to BPS until funds are fully spent. After funds are fully spent, a Final Project Report (the "Final Report") summarizing project progress and costs incurred will be submitted to BPS within 30 days.
- 3) **SITE VISITS** During the terms of this Grant, Grantee authorizes the U.S. Department of Energy (DOE) through its partnership with BPS to conduct periodic site visits to examine, inspect and collect data on the project coordination by the Grantee. BPS will conduct such site visits only after providing reasonable notice to the Grantee. Site visits will occur only during the hours between 8:00 a.m. until 6:00 p.m., Monday through Friday, unless otherwise mutually agreed by the parties. Grantee shall also allow for site visits throughout the first year (or longer as agreed upon by the parties) of occupancy to accommodate for monitoring and verification by the DOE, BPS or a designated party. The frequency and the level of site visits will be determined by the Grant Manager. Notwithstanding such site visits or lack thereof, Grantee shall remain fully responsible for complying with all terms and conditions of this agreement.
- 4) **PUBLICITY** Grantee will allow BPS to collect and publish information about the project performance of the Solar Now! program, including but not limited to interviews with Grantee and Project participants such as the project coordinator and volunteers. BPS may photograph and videotape work regarding the execution of the project. Any publicity shall indicate that the project was made possible by an ARRA Grant from BPS through funds provided by the U.S. Department of Energy, Solar America Cities Special Projects award. BPS may include information regarding the Project in periodic public reports.

The Grantee authorizes BPS to use the Grantee's name and the Project's address in developing and distributing marketing materials on the Solar Now! Statewide Partnership.

Grantee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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- 5) **PROJECT UPDATES** Grantee shall make itself available for regular project update meetings with the BPS project team. Project meetings shall include the current phase or status of the project and identify any changes from the initial proposal including change of scheduling and or changes to measures of success of project delivery.
- 6) **MONITORING AND VERIFICATION** BPS may also collect data about the number or outreach events, attendance at events, and resulting solar installations as a result of the project. BPS may also collect data on the costs of installing solar residential systems associated with the Solar Now! educational and outreach project. Grantee will make available any necessary solar educational workshop events, and installation data needed for the verification of project success.
- 7) **TERM** This agreement is effective upon the date of the last signature by a party as indicated below. The term of this agreement is valid through \_\_\_\_\_ (date).
- 8) **EARLY TERMINATION** This agreement may be suspended or terminated at any time by:
  - A. Written notice provided by BPS to Grantee before Grantee incurs any obligations;
  - B. Written notice by BPS resulting from a material failure by Grantee to comply with any term of this Grant, or;
  - C. Mutual written agreement of the parties.

Within sixty (60) days of early termination of this Grant, Grantee agrees to return to BPS the full amount of any Grant funds paid by BPS to the Grantee under this agreement.

As of the date of any termination, or expiration of the term of the agreement, any pre-existing unresolved claim or dispute by either Party, including but not limited to, money owed, performance due, or any other obligations of the Parties, that is the result of the other Party's performance or non-performance, will, by their terms, survive termination of this Agreement and will be resolved in accordance with the terms and conditions of this Agreement. All indemnity, confidentiality and unperformed obligations will survive termination of this Agreement.

- 9) **FINAL PROJECT REPORT** The Final Report will be due to BPS 30 days after project funds are fully spent. If the project is not complete by \_\_\_\_\_ (date), Grantee will still issue a report \_\_\_\_\_ (date). The Final Report will include all details outlined in the project coordination in paragraph 1. The Final Report will require information on the total number of workshops, events, and any photovoltaic installations, and kilowatts generated as a result of the project.
- 10) **NOTICE** Any notice provided under this agreement shall be sufficient if in writing and: (1) delivered personally; (2) deposited in the United States mail, postage prepaid, first class; (3) sent by courier, or, (4) transmitted by facsimile, addressed as follows, or to such other address as the receiving party specifies in writing:

Grant Manager  
Lee Rahr

Grantee  
[Grantee contact person]

Bureau of Planning and Sustainability  
1900 SW 4th , Suite 7100  
Portland, OR 97201  
Tel. 503-823-7581  
Lee.rahr@portlandoregon.gov

[Grantee organization]  
[Grantee address]  
[Grantee Tel:]  
[Email address:]

**11) MISCELLANEOUS**

A. Records. Information submitted to BPS is subject to public review and inspection under the Oregon Public Records Law. Grantee acknowledges its responsibility for becoming familiar with the provisions of the Oregon Public Records Law. Grantee understands that, in response to public records requests, the City of Portland may be required to disclose documents in its possession regarding the Project. If BPS receives any public records request for disclosure of such information, BPS will provide the Grantee with written notice of the request, including a copy of the request, within five (5) working days of receipt of the request. Grantee will have five (5) days within which to provide a written response to BPS regarding the request, before BPS may release the requested records. Whether the Grantee submits any written response to BPS, BPS will retain final discretion to determine whether to release the requested records, provided that BPS will give the Grantee at least five (5) days written notice after receipt of any response from Grantee.

B. Withholding. Grantee is responsible for any federal, state or local taxes and fees applicable to payments under this agreement. Grantee is independent of the City of Portland. Grantee, its contractors and employees are not employees or agents of the City, and are not eligible for any benefits through the City, including without limitation, federal social security, health benefits, workers' compensation, unemployment compensation and retirement benefits. Federal law requires that the City of Portland notify the federal Internal Revenue Service (the "IRS") of payments to the Grantee. The necessary information includes, but is not limited to, Grantee's name and taxpayer I.D. number. In the event that Grantee provides BPS with inaccurate information for reporting to the IRS, Grantee acknowledges that federal law may require that BPS withhold up to twenty percent (20%) of any amounts paid to Grantee under this agreement.

C. Non-Assignment and no Subcontracting. Grantee may not transfer or assign any of its rights or responsibilities under this agreement to any other person without first obtaining written permission from BPS. Grantee shall not subcontract with any party for performance under this agreement without first obtaining written permission from BPS.

D. Waiver. The failure of BPS to enforce any provision of this agreement shall not constitute a waiver by BPS of that or any other provision. No waiver, consent, modification, or change of terms of this agreement shall bind either party unless in writing and signed by both parties. Such waiver, consent, modification, or change, if made, shall be effective only in specific instances and for the specific purpose given.

E. Amendment. The Grant Manager will be Lee Rahr or such other person as may be designated in writing by the Director of the Bureau of Planning and Sustainability. The Grant Manager shall have the authority to extend the term of the agreement or make other changes that do not increase the Total Grant Amount or otherwise increase the City's risks, subject to approval of the Director of the BPS. No amendments of this agreement will be valid unless signed by a duly authorized representative of the grantee. The Grant Manager is also authorized to determine if Grantee has failed to substantially comply with the requirements of this agreement, and to act on behalf of BPS to suspend or terminate this agreement.

F. Forum. Any litigation between the parties arising under or regarding this agreement shall occur, if in the state courts, in the Multnomah County Circuit Court in Portland, Oregon, and if in the federal courts, in the United States District Court for the District of Oregon in Portland, Oregon.

G. Choice of law. This agreement shall be governed by and construed in accordance with the laws of the State of Oregon, even if Oregon's choice of law rules would otherwise require application of the law of a different state.

H. Merger. This agreement and the Project Features constitute the terms and conditions of the Grant. There are no understandings, agreements, or representations, oral or written, not specified herein

regarding this Grant. Grantee, by the signature of its authorized representative, hereby acknowledges that the terms and conditions have been reviewed, that they are understood, and that Grantee agrees to be bound by all of the terms and conditions set forth in this agreement.

I. Project Liability, Indemnification And Responsibility For Project. Grantee is solely responsible for coordination, operation and maintenance of the project, as well as the selection and oversight of any contractor chosen to carryout the Project. Grantee agrees that the City, the BPS has no responsibility or liability for the management or construction of the Project. BPS makes no warranties, express or implied, regarding the Project or their potential benefits. Grantee expressly waives any claims against BPS regarding the Project. BPS's liability under this agreement shall be limited to payment of the Total Grant Amount, to the extent that Grantee has otherwise fully and completely complied with all terms and conditions of this agreement. In no event shall BPS or the City of Portland be liable to Grantee for any special, punitive, exemplary, consequential, incidental or indirect losses or damages (in tort, contract or otherwise) under or in respect of this agreement or for any failure of performance related to the Project or this agreement, however caused, whether or not arising from BPS's sole, joint or concurrent negligence. Grantee shall hold harmless, defend and indemnify the City and the City's officers, agents and employees against all claims, demands, actions and suits (including all attorney fees and costs) brought against any of them arising from or relating to the Project.

J. Non-Discrimination. In carrying out activities under this agreement, the Grantee shall not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, handicap, familial status or national origin. The Grantee shall take actions to insure that applicants for employment are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, age, handicap, familial status or national origin. Such action shall include but not be limited to, the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Grantee shall post in conspicuous places, available to employees and applicants for employment, notices provided by the City setting forth the provisions of this nondiscrimination clause. The Grantee shall state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, or national origin. The Grantee shall incorporate the foregoing requirements of this paragraph in all of its contracts for work funded under this agreement, except contracts governed by Section 104 of Executive Order 11246. Grantee shall be EEO certified by the City of Portland in order to be eligible to receive grant funds.

K. Severability. If any provision of this agreement is found to be illegal or unenforceable, this agreement shall nevertheless remain in full force and effect, and the provision stricken.

L. Entire Agreement. This agreement, including any attachments, constitutes the entire agreement of the Parties regarding the subject matter of this agreement and supersedes all previous agreements, proposals, and understandings, whether written or oral, relating to that subject matter.

Signed

\_\_\_\_\_  
Grantee's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name (please print)

\_\_\_\_\_  
Address

\_\_\_\_\_  
Social Security # or Tax ID if Applicable:

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Susan Anderson, Director, Bureau of Planning and Sustainability

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Date

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Bureau of Purchasing

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Date

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Office of City Attorney

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Date