ADDENDUM #1

July 12, 2019

RFP #7598863

Title: COMMUNITY SOLAR MARKETPLACE WEBSITE DEVELOPMENT - DOA

Bid Closing Date & Time: JULY 22, 2019 2:00 PM (Eastern Time)

ATTACHED ARE THE VENDOR QUESTIONS WITH STATE RESPONSES.

NO FURTHER QUESTIONS WILL BE ANSWERED.

Interested Parties should monitor this website on a regular basis, for any additional information that may be posted.

Robert DeAngelis

Senior Buyer

The following questions were received from vendors regarding RFQ 758863 Community Solar Marketplace Website Development. The State responses are highlighted in yellow.

Vendor A

I have reviewed the RFP and I note the requirement that "The developer will launch the webpage no later than September 1, 2019." Is this still true, or is this obsolete information? If the latter, what is the desired launch date? Should I regard the target as a hard-deadline contractual obligation or a target? This is a beta-version target date. The developer should plan on launching the final version October 2019.

Vendor B

1. The RFP includes a requirement that "The developer will launch the webpage no later than September 1, 2019." Is this still true, or is this obsolete information? If the latter, what is the desired launch date? Is the desired launch date a hard-deadline contractual obligation or a target? This is a beta-version target date. The developer should plan on launching the final version October 2019.

2. Can the grant document be made available so we're aware of the full project context and goals before writing a proposal? See the project plan at the end of this document.

3. Scope of Work task #15 mentions that OER will provide information from clients, e.g. third-party customer acquisition companies. Please explain what information you anticipate from this type of client and how it will be used. The team plans on providing contact information, project details (including community solar project summary, community solar farm locations, links to developers and/or customer acquisition management sites and relevant images) and, possibly, sample customer contracts.

4. To what extent do you anticipate that ongoing data acquisition and/or automation will be needed. I.e. is data integration needed or will all content be managed via the CMS after the website is launched? Periodically, based on project construction and interconnection. OER will be updating any new information. This will not be automatic.

Vendor C

1. Roughly how many community solar projects will be included in the online marketplace? Approximately 15 are currently in the interconnection que.

2. Do you anticipate the website having commerce capabilities to process payments for monthly fees from community solar developers? No. Solar developer fees would be processed through OER.

3. Please provide detail on the form and calendar requirements in section 9.b. The calendar tool will be basic in nature that will provide simple event information. We envision all forms to be basic in nature as well (i.e. a simple "Contact Us" form or perhaps several additional forms that address specific but limited topics.) However, the form structure should be:
    1. Clean and intuitive
    2. Offer input fields should offer options such as "required", single line text, paragraph text, multiple choice checkboxes, radio buttons, and dropdowns.
    3. Secure in nature (i.e. provide CAPTCHA/reCAPTCHA, transmit via SSL, etc.)
    4. Offer assistance and validation components
    5. WCAG 2.1, AA compliance for fields

4. On page 9, you state that vendor will identify at least three hosting companies and gather detailed costs. It also appears that you are asking for specific costs in the costing template. Please clarify. UPDATE: Please omit this item. Web hosting services have now been decided by OER.

5. Many of the security questions relate to the hosting provider. How should these questions be addressed if a hosting vendor will be selected during thew engagement? (related to #4 above) UPDATE: Please omit this item. Web hosting services have now been decided by OER.

6. Are there specific software frameworks or programming languages that your IT staff prefers to use for this project? There are no specific software frameworks or programming language that is preferred. However, staff have experience working with LAMP stacks and open source CMS such as Drupal, Joomla, and Wordpress.

7. Please confirm whether RI OER uses a CMS today? If so, which one? How long have you used this CMS? There is no CMS in use today with RI OER. All sites are built on Foundation 5 framework.

8. Please confirm whether RI OER intends to move away from its existing CMS? The Community Solar Marketplace website will be a stand-alone system that will not be directly bound to the internally hosted RI OER website (http://www.energy.ri.gov/)

9. Is RI OER familiar with the Drupal CMS? DoIT has a basic understanding of Drupal.

10. Will RI OER consider an open source CMS for this project? Yes

11. Since the Community Solar Marketplace Website will be newly developed, please provide the estimated page views per month? ==Once the full marketing campaign is in effect, OER has a target of 15,000 – 20,000 page views per month.==

12. Will file storage be required? If so, for how many total files? ==File storage / CDN will be provided by OER's selected hosting provider==

13. Estimated bandwidth usage per month? ==Approximately 5GB per month==

Vendor D

1. On page 7, the RPF indicates, "At a minimum, the Vendor agrees to provide all payment activities to and meet with the OER on a weekly basis." What is meant by "payment activities" in this context? Exactly what will the vendor's responsibilities be relative to these "payment activities?" ==Payment activities are activities for which the vendor will invoice to OER.==

2. On page 9, the RFP indicates that the vendor will be expected to "identify at least three potential web hosting companies," along with detailed costing. Is it Rhode Island's expectation that this information will be submitted with bids, or during the performance period? If the former, how would the state like vendors to factor the three quotes packages' distinctive pricing models into the costing for this contract? ==UPDATE: Please omit this item. Web hosting services have now been decided by OER.==

3. At several points in the RFP, there is reference to PII that will need to be handled. Please clarify the scope of the anticipated PII, and also explain the purpose for which it will need to be collected? ==PII can be as simple as name and address or more detailed such as DOB, income, family size, etc.   This question cannot be answered until the discovery phase determines exactly what information will be harvested by potential customers.==

4. The RFP makes reference to a September 2019 launch date. Is this a firm deadline? Will it be adjusted relative to actual date of award? (example. In the event that award takes longer than anticipated) ==This is a beta-version target date. The developer should plan on launching the final version October 2019.==

5. Please clarify the minimum scope that would need to be live by September 2019. The whole site/application, or just a placeholder? ==This is a beta-version target date. The developer should plan on launching the final version October 2019.==

6. Please clarify the target audience for the marketplace. Will it be oriented to industrial companies (i.e., community developers and construction companies), or to private

citizens (i.e., private individuals who are looking for solar installations at their homes). ==The marketplace is intended to serve potential community solar customers. These are private individuals interested in participating in community solar projects. OER has a particular interest in serving LMI (low and moderate income) customers, as they are in position to receive the greatest benefit from the energy cost savings available through participation in community solar. Please note the definition of community solar and how it differs from private rooftop solar:==

> ==A community solar project—sometimes referred to as a solar garden or shared renewable energy plant—is a solar power plant whose electricity is shared by more than one household.==

> ==The primary purpose of community solar is to allow members of a community the opportunity to share the benefits of solar power even if they cannot or prefer not to install solar panels on their property. Project participants benefit from the electricity generated by the community solar farm, which costs less than the price they would ordinarily pay to their utility.==

7. On page 6, the RFP refers to projects seeking "subscribers." Will the resulting application need to support "subscription" to services? If so, please clarify the nature of the subscription. Is this merely subscription to news and informational updates about a project, or is it rather a contractual enrollment transaction? ==No. Subscription services will be handled by the solar developers either directly or through a customer acquisition management company. The Marketplace will provide links to these sites.==

8. Will the emphasis of the solution be exclusively on informational access, or will there be a need for transactional functionality? If the latter, please clarify the relevant scope. ==Only informational access.==

9. Will users need to have personal accounts? If so, for what purpose? ==No==

10. Please clarify the scope of system integrations that will need to be supported. ==There are no planned systems integrations at this time.==

11. Will the system need to publish any APIs, so that data can be accessed by external applications? If so, please clarify the scope of the data that will need to be published via API. ==There is no need for any APIs at this time. As the Solar Marketplace initiative evolves, there may be a need in the future.==

12. Are there different categories of community solar projects that would need to be supported in the marketplace? (example. Public vs. Private?) The RFP does seem to imply some sort of distinction when it indicates that Community Solar Developers "stated that there is value to include their projects." What other types of projects would be publicized by the new system, other than the projects of the Community Solar Developers? These projects do not fall into different categories. No other types of projects will be shared on this system.

13. Is the expectation that the website would be paid for by monthly fees? If so, would the fees need to be collected by the successful vendor, or by the State? Yes. Fees would be collected by OER.

14. Have Community Solar Developers given any indication of what a reasonable monthly or upfront fee might be for the exposure enabled by this system? No, however discussions are underway to determine an appropriate monthly fee.

15. What sorts of information does the state expect to publish on each project record? Just text? Imagery? Metrics? Visualized data? Text and imagery.

16. Please clarify the scope of any metric data that will need to be maintained by the system. What will be the source(s) of this data, and how will it be input into the new system? Basic search engine analytics will be required.

17. Please describe the envisioned scope of users and roles.

The marketplace is intended to serve potential community solar customers. These are private individuals interested in participating in community solar projects. OER has a particular interest in serving LMI (low and moderate income) customers, as they are in position to receive the greatest benefit from the energy cost savings available through participation in community solar. Please note the definition of community solar and how it differs from private rooftop solar:

A community solar project—sometimes referred to as a solar garden or shared renewable energy plant—is a solar power plant whose electricity is shared by more than one household.

The primary purpose of community solar is to allow members of a community the opportunity to share the benefits of solar power even if they cannot or prefer not to install solar panels on their property. Project participants benefit from the electricity generated by the community solar farm, which costs less than the price they would ordinarily pay to their utility.

18. Will users only be internal State personnel, or will third parties need to use the system as well. If the later, please describe the envisioned use case(s). <mark>See above</mark>

19. Please describe any envisioned workflows. <mark>Workflows will be determined during the discovery phase.</mark>

20. Please describe the scope of any reporting requirements. What types of reports will need to be drawn from the system? By whom? <mark>See Q16</mark>

21. Will there be a need for data integration at the individual project level? <mark>No</mark>

22. If integrations with the infrastructure of multiple projects will need to be accomplished, will there be any data standards (schemas, formats, etc.) that bidders can assume will be abided? <mark>The Solar Marketplace website only connects customers with providers based on certain criteria.</mark>

23. For how many solar projects will data need to be maintained? <mark>Approximately 15 are currently in the interconnection que.</mark>

<u>Rhode Island Low-Moderate Income Solar Strategy Project Plan</u>

In 2017 Governor Raimondo issued a policy plan with a goal of 1,000MW of clean energy by 2020. The Rhode Island Office of Energy Resources (OER) is working to ensure not only that the goal is met, but that solar is an option for all Rhode Islanders. This requires new approaches to solar, including community solar opportunities, for customers that do not have a traditional "good site" for solar, tenants of multifamily buildings, condo owners, and low/moderate income (LMI) households.

LMI Solar Program Challenges

OER has convened a Solar Access Working Group since 2015 to help identify and address the issues related to LMI solar adoption as well as expanding access to solar across the state for all residents. The biggest issue we have discovered through our work is a fundamental lack of knowledge about LMI energy programs that could reduce customer electric bills. For instance, several thousand RI residents who may qualify for National Grid's LMI rate code have not signed up to receive a lower electricity rate, despite their high energy burden. More education and outreach is needed as well as internal OER engagement with National Grid.

In addition, some well-intentioned programs to help low-income customers reduce energy bills have proven to have design problems. For example, the National Grid led SolarWise program, designed to encourage energy efficiency in addition to solar, was cancelled after robust program evaluation found that the program had low adoption rates and was unpopular among residential solar developers. In fact, it was so unpopular that a few developers would not offer the program to potential solar customers since the energy efficiency work required before going solar took too long to implement and disrupted the solar sales timeline.

One of the challenges Rhode Island has had in recent years is finding good candidates to represent the LMI sectors on the various boards that oversee both renewable energy and energy efficiency programs. The Renewable Energy Growth Program, created by statute[1], is administered by National Grid and overseen by a 10 member Distributed Generation Contracts Board.[2] Board members must be nominated by the Governor and approved by the legislation. They represent various sectors including residential, commercial, the solar industry, and low-moderate income sectors. From early 2017 through May 2018, the DG Board member representing the low-moderate income sector resigned from the board. Unfortunately, OER was unsuccessful in finding a replacement during the 2017 legislative session. However, during the 2018 legislative session, which concluded in June 2018, a new board member representing this sector was confirmed.

The Solar Access Working Group, prior to 2017 had been co-led by OER and the previous low-income DG Board member. The group, led by exclusively by OER, met throughout 2017 and discussed a strategy for ensuring that solar is accessible to all Rhode Islanders, especially the LMI market. This strategy is designed to help understand more precisely the barriers to LMI solar adoption, especially given the expected, robust growth in the community solar market. Once the barriers are understood, we plan an education campaign with the goal of educating the LMI sector about solar, specifically community solar, and making LMI residents aware of the incentive opportunities that will be available through the Community Renewables Program.

New and Evolving Solar Programs in Rhode Island

Solar programs in Rhode Island are in a period of transformation. During the course of 2017, some of the Rhode Island solar programs changed in ways to allow more community solar projects. Other programs shifted focus or were eliminated altogether. New programs for 2018 have been proposed in some of the various dockets currently before the Public Utilities Commission.

Two new community solar programs became available in Rhode Island in mid-2017, the 30 MW Virtual Net Metering Pilot (30 MW VNM Pilot) and the Renewable Energy Growth Program (Community Remote Distributed Generation or CRDG). Both programs have proved to be popular among developers. Approximately 28MW of virtual net metering projects and 6 MW of CRDG projects for a total of 34 MW are currently under development. While OER did not have a stated goal for the number of community solar projects in 2017, the CRDG program had 6 MW available to the market and the MW was fully subscribed by November 2017. This was unexpected and surprising. Unfortunately, it does not appear as though any of these 34MW will be specific to the LMI community

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[1] http://webserver.rilin.state.ri.us/Statutes/TITLE39/39-26.6/INDEX.HTM
[2] http://www.sos.ri.gov/openmeetings/index.php?page=view_entity&id=6154

The Renewable Energy Fund's Community Renewables program[3], which went live in Spring 2018, will provide incentives to developers participating in the 30 MW VNM pilot. This program will enable developers to offer a better value proposition to customers. A higher incentive will be provided to developers when they sign up low-income customers. Several iterations of program design occurred in 2017 with the goal of creating a clear and easily understood program by both developers and community solar subscribers. Attempts were made to reduce the amount of necessary paperwork by developers and subscribers up front and require minimal monthly reporting that would not be deemed administratively burdensome by all parties, including program administrators. Community solar developers will receive the grant funding upfront, including $300 for each participating standard residential customer (National Grid Rate Code A-16) and $500 for each participating LMI customer (National Grid Rate Code A-60). The developer will pass through the subscription fee reduction to customers. This upfront funding should provide means and support for the expensive costs associated with customer acquisition for the developer and provide a benefit to subscribers.

In addition, National Grid recently filed a Power Sector Transformation (PST) docket, which is still under review by the PUC, with an idea to utilize utility owned community solar to provide bill credits for LMI customers.[4] They anticipate they would not only learn about the community solar market and the challenges associated with these types of projects, but would be able to further support their energy efficiency programs for the LMI sector through revenue generated by the projects through REC sales. This proposal is preliminary, and it is not clear yet exactly what value would be provided to LMI customers. However, it is an example of another approach that may enable LMI residents to benefit from community solar.

Strategies to Advance LMI Solar in Rhode Island

Strategy #1

Title: Ask

Description: In order to understand how the residential sector, including the LMI sector, thinks about solar and about community solar in particular, we will conduct a series of online surveys. The survey will reach both A60 and A16 rate code customers.

Target: Receive and analyze survey responses from at least 1000 customers, including 500 A-60 customers.

Work plan: OER will work with the Solar Access Working Group to develop the survey questions. It will be important to frame the questions as to not skew the survey and to keep it relatively short, approximately 12-15 questions. Once developed, an OER intern will design the survey using SurveyMonkey. Email addresses will be generated from working group members who have access to hundreds of LMI customer email addresses. The survey will be co-branded by OER, the working group, and various working group companies. The survey will be sent to at least one thousand customers, with

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[3] https://commerceri.com/wp-content/uploads/2018/05/Community-Renewables-Requests-5.11.18-1.pdf
[4] http://www.ripuc.ri.gov/eventsactions/docket/4780-NGrid-PSC-Book1of3.pdf (page 158).

a goal of half of those customers in the LMI sectors. Two follow up reminder emails will be sent. Responses will be cataloged and the results summarized by the intern. Results will be shared with the working group.

Strategy #2

Title: Learn

Description: In order to refine and deepen the understanding gained through the online survey, OER will hire a marketing firm to conduct a series of two or three focus groups around the state to learn more about how OER and the working group can craft an education campaign on community solar. The contract for the marketing company would be short, given that the work would likely be complete by the end of Fall 2018.

Target: Two or three focus groups around the state, each including at least 40 participants, and in total including at least 20-25 low-income participants.

Work plan: OER will develop a Request for Proposal (RFP) for the marketing firm to conduct the focus groups and work with State Purchasing to issue the RFP. A few working group members have committed to help edit the RFP. Once a company is brought on board, at least one in-person meeting with the consultant to kick off the project and create the implementation plan for the focus groups will be held. At least two focus groups will be held, one each in the northern and southern parts of the state to maximize the geographical range of customers able to attend.

Strategy #3

Title: Educate

Description: For the past five years, OER has administered a successful Solarize program. Building on the resources and experiences the program created, as well as what was learned through the survey and focus groups, OER will create an education campaign on community solar. This campaign will be deployed to all residential customers across the state.

Target: OER has educated over 4500 residents about solar through the Solarize program. We plan to reach out to those customers who decided not to go solar (approximately 4,000) to educate them about community solar. In addition, the target range for the LMI module will be several hundred (target 500) with the goal of 100 in-person attendees for educational meetings.

Work plan: Many customers who went through the Solarize Rhode Island program had homes that were unsuited for solar or found that solar was not the right decision for their home.   Various solar education models will be created for different audiences. These models include target audiences of past Solarize customers, an LMI-specific module and perhaps others as identified after completion of the first two strategies. The Solarize customer module will likely be email based, with the potential for a few in-person educational events in past Solarize communities. The LMI module will likely require more in-person educational meetings. OER plans to explore whether a module in Spanish is needed, especially for LMI customers. The residential solar OER website will also be expanded to include informational resources about community solar.

Strategy #4

Title: Connect

Description: Develop an online community solar marketplace. This website, which would be hosted by OER, would link potential community solar customers with existing community solar projects actively seeking subscribers. It is anticipated that educational resources, including the modules developed under strategy #3, and links to programs, including the Community Renewables program, will be included. If developers offer discounts or other options for LMI customers, they will be highlighted as well. For example, community solar projects targeted towards affordable housing that go through the 30 MW virtual net metering program must provide additional benefits for the tenants. Possible benefits include offering reduced price or free broadband to tenants, a new playground, etc.

Community solar developers that have heard about the community solar marketplace like the idea and have tentatively stated that there is value to include their projects. That value could possibly justify a monthly fee or upfront fee for having their projects listed which would help pay for the continued maintenance of the website. One challenge to implementing this idea is to ensure, in advance of securing the services of a vendor, that a public entity could host such a marketplace and still confirm to state purchasing requirements related to procurement. In addition, OER would have to seek approval from the state IT department.

Target: All of the community solar projects in Rhode Island actively seeking subscribers as well as potential community solar customers.

Work plan: OER will develop a Request for Proposal (RFP) for the firm to help develop and maintain the website. OER will work with State Purchasing to issue the RFP. A few working group members have committed to help edit the RFP. Once a company is brought on board, at least one in-person meeting with the consultant to kick off the project. Due to the complexity involved with this plan, OER expects that close coordination with the State IT department will be needed with RFP development, scoring of proposals, contracting with the selected vendor, as well as design and implementation of the website.

OER will provide most of the staff resources necessary to complete this strategy utilizing SES grant funds. One OER staff person will be needed with supplementary work completed by the RI State Purchaser assigned to this RFP. Additional volunteer time by working group members will be utilized for RFP review. Other funding sources, including possible fees charged to developers, will be explored in order to pay for the maintenance of the marketplace in future years

Strategy #5

Title: Meet with developers and subscription management companies

Description: Throughout all steps of implementation of this plan OER wants to continuously hear feedback from community solar developers. OER and Commerce RI have a long history of meeting with stakeholders regularly. To date, three meetings have been held specifically for community solar developers with projects in the interconnection queue to discuss both the Community Renewables program as well as the various project timelines. OER plans to continue community solar stakeholder engagement to ensure that marketing efforts to the LMI community will be made and request additional

input when needed. In addition, OER will ensure that state resources are available to developers related to interconnection timelines, permitting, and siting of these projects.

Some of the community solar projects that are in development have already identified their consultant or partner who will handle subscriber management. OER has met with one to date and will ensure that future engagement and meetings for community solar developers also include their respective subscriber management companies.

Target: Continue meeting with the project developers of all 34MW of community solar projects in the interconnection queue and applicants of the Community Renewables program as well as subscriber management companies. Some of these companies have multiple projects, so our target audience is currently about 5-8 developers and subscriber management companies with the goal of reaching all companies working on community solar projects in Rhode Island.

Work Plan: OER and Commerce RI will continue to hold quarterly solar stakeholder meetings which cover solar industry updates, relevant presentations to the solar market, new policies related to legislation, programs, or workforce development, etc. The last hour of the next several stakeholder meetings will be specific to community solar developers and subscriber management companies.