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**Vibrant Places Matching Grant Program**

**A SUNpowered Campaign**

Department Of Community Investment

City of South Bend

227 West Jefferson Boulevard, Suite 1400S

South Bend, IN 46601

(574) 233-0311

**REQUEST FOR PROPOSALS**

Commercial PV Installation Services – Vibrant Places Approved Installer Selection

**Issued**: December 19th, 2022

**Due**: January 16th, 2023; 5:00 PM EST

**Submissions to: sustainability@southbendin.gov**

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# Project Overview

## Purpose of RFP (Preferred Solar Vendor Listing)

The purpose of this Request for Proposals (RFP) is to solicit company information proposals from solar photovoltaic (PV) installers (“Installers”) who would like to provide their services to participants in the SUNpowered Vibrant Places program for businesses to install solar panels and energy storage (battery) systems on their properties. The City of South Bend is looking to screen and select a limited group of professional, capable, experienced, and cost-effective solar engineering, procurement, and construction (“EPC’s”) vendors who local business owners can approach to design and install both rooftop and ground-based systems. ***Note, this is not a priced based RFP bid, but a vendor screening and selection exercise.***

The Vibrant Places Matching Grant program will provide incentives for businesses to install solar and battery systems in addition to them claiming the benefits of the federal Investment Tax Credit (30%) and accelerated depreciation (MACRS). Grants will be awarded at the 15% (citywide) and 25% (development corridor) of total project cost level, subject to a maximum grant cap.

## Project Partners

The City of South Bend has retained Solar United Neighbors of Indiana (SUN) and Generation Solar LLC to design and administer the RFP process, as well as provide business location specific guidance on solar suitability and EPC quotation and selection.

## Project Goals and Strategies

The intent of the Vibrant Places Matching Grant Program is to:

● Enhance the appearance, value, and character of properties in the city

● Encourage investment by business and property owners

● Generate additional sales for qualifying businesses

● Invest in sustainable, energy-efﬁcient, low-carbon improvements and climate

change mitigation

● Promote a walkable urban development pattern

The Vibrant Places matching Grant Program is not intended to support deferred maintenance.

## Project Details

**Campaign Coverage:**

Businesses located in the City of South Bend are eligible to apply for a grant award to partially cover the cost of their solar and/or battery system installation. A business use must be present on the property or be established within six months of final grant payment. Property taxes must be current. The property must not be listed for sale.

Businesses located in one of the following corridors are eligible for an increased grant of 25% vs. the standard 15%:

● Lincoln Way West: between LaSalle Avenue and west city limits (near Maplewood Ave.)

● Indiana Avenue: between Pulaski Street and Main Street

● Linden Avenue: between Walnut Street and Olive Street

● Miami Street: between Lincoln Way East and Altgeld Street

● Michigan Street: between Bronson Street and Donmoyer Avenue

● Mishawaka Avenue: between Eddy Street and Logan Street

● Portage Avenue: between Diamond Avenue/Angela Boulevard and Kinyon Street

● Elwood Avenue from Portage Avenue to Wilber Street

● Western Avenue: between William Street and west city limits (near Mayﬂower Road)

**Campaign Terms:**

The Vibrant Places Matching Grant Program includes incentives for businesses to install solar photovoltaic (PV) panels and battery storage systems in addition to other possible exterior enhancement, energy efficiency and resiliency awards. Grant details are as follows:

Grant share (corridors) 25%

Grant share (city) 15%

Maximum grant amount (corridors) $30,000 (25% of a $120,000 project)

Maximum grant amount (citywide) $20,000 (15% of a $133,333+ project)

The grant amount will be calculated using the total cost for solar panels and battery backup (if applicable). For both solar panels and battery storage systems, businesses will be strongly encouraged to claim the federal ITC.

***Note that if a business is in a certain part of the downtown area (map below), due to the design of the downtown electrical distribution system, the system will not be allowed to export excess energy to the grid, with the focus being on systems designed to fully self-consume or store excess energy in a site located battery system.***

The grant is structured as a reimbursement program; businesses must complete the project and contribute their private match before grant funds are issued. Actual grant amounts depend on the speciﬁc elements of a project and may not equal the maximum amounts outlined above.

As a condition of receiving this solar incentive funding, businesses agree to share 12 months of utility data with the City before solar panel installation and after installation.

Downtown Underground Electric Network Footprint With Power Export Restrictions



**Installer Selection:** Installers should review this RFP and submit a detailed and complete proposal, with all required supporting documents according to the format specified in Section 3: Proposal Requirements. Partial submissions will not be considered. SUNpowered Vibrant Places will convene a selection committee that may be comprised of local government officials and representatives of partner organizations to review the proposals and select a small group of approved commercial EPC’s based on the selection criteria listed in Section 4: Proposal Evaluation. If the selection committee does not find any proposals meeting their required criteria, Vibrant Places reserves the right to not select Installers or to open further recruitment windows to ensure adequate EPC participation.

**Installations:** The Selected Installer(s) can begin installations as soon as grants are approved and contracts are signed and must complete all installations, permitting, and interconnection processes by the deadline listed in Section 1.5: Project Timeline.

## Project Timeline

The timeline and deadlines for this RFP and SUNpowered Vibrant Places are as indicated below and may be modified at the discretion of the City of South Bend and partners. An addendum will be issued in the event of any scheduling changes.

|  |  |
| --- | --- |
| **Project Milestone** | **Date** |
| RFP Released | December 19, 2022 |
| RFP Written Questions Deadline | January 6, 2023 |
| **Deadline to Submit RFP Proposal** | **January 16, 2023** |
| Installer Interviews If Required | January 16 - 20, 2023 |
| Selected Installer(s) Announced | January 19 - 20, 2023 |
| Selected Installer(s) Onboarding | January 23 - 27, 2023 |
| Enrollment & Contracts Begin | January 21, 2023 |
| Business Enrollment Period Ends | June 30, 2023 |
| Business Contract Signing Deadline | September 31, 2023 |
| Installation Deadline (energized & utility meter swap) | December 31, 2023 |

## Installer Benefits

Vibrant Places SUNpowered is explicitly designed to stimulate local solar development and, by doing so, support local commercial solar installer growth. This campaign intends to significantly build awareness of solar in the commercial and retail community and accelerate solar PV adoption in emerging markets, which should benefit all installers in the long term.

The SUNpowered Vibrant Places team will require interested business owners to attend Solar 101 sessions prior to grant application and will then remotely pre-screen the location for suitability and financial viability and produce initial PV designs (Aurora and/or Energy Toolbase) to fully ensure business owner buy-in. Businesses will then be introduced to the commercial EPC’s on the city shortlist for further site and vendor specific quotations. **Project scope, design, pricing, and materials selection will be for the EPC and client to agree on, but final proposals will be reviewed by Vibrant Places before grant applications are made.**

By the city grant awards and initial business screening, the selected Installer(s) can expect to see a large volume of customers with very high conversion potential, resulting in reduced customer acquisition costs and increased margin. In addition, the selected EPC’s will have the opportunity to build relationships within the local city and business community, gain media and event exposure, and increase their brand recognition and future referral business.

# Scope of Work

## City of South Bend and Partner Responsibilities

City of South Bend will perform the following project management, marketing, business recruitment, pre-screening, and permitting responsibilities as part of SUNpowered Vibrant Places in collaboration with the other project partners.

1. City of South Bend and partners will lead the necessary project management responsibilities as part of the SUNpowered Vibrant Places campaign. This includes the following:
   1. Project, management of campaign partners, and setting and adjusting the program’s timeline.
   2. Supporting participants and the selected Installer shortlist throughout the process.
2. City of South Bend and project partners will lead the necessary marketing responsibilities as part of SUNpowered Vibrant Places. This includes the following:
   1. Conducting outreach and organizing business educational events along with other program partners. This will include presentations with community-based organizations (CBOs) during in-person and/or virtual community events (depending on public health guidelines), newsletters, social media, flyers, press releases, and promotional activities undertaken in partnership with other city departments. It will also include outreach to key government bodies within the City of South Bend and efforts to engage large city employers who may wish to benefit from SUNpowered participation.
   2. Creating and providing the selected Installer(s) with logos and marketing language.
   3. Maintaining and updating common and shared lead data management systems with the installer(s) via Google Docs or a common-access CRM.
   4. On campaign completion or on meeting a significant milestone organizing and hosting a final event to celebrate the program’s success and recognize contributions from all partners, including the Selected Installer(s).
3. City of South Bend and partners will perform the necessary business recruitment responsibilities as part of SUNpowered Vibrant Places. This includes the following:
   1. Creating a webpage representing the program and managing the sign-up information through this webpage. Sign-up information will include, but not be limited to, address, type of property and business, roof type and age (if known), ownership status and utility billing history.
   2. Responding to and answering SUNpowered Vibrant Places related questions from business owners by phone and/or email within two business days.
4. City of South Bend and partners will perform the necessary business pre-screening responsibilities as part of SUNpowered Vibrant Places. This includes the following:
   1. Conduct an initial pre-screening of interested participants based on intake questions as well as roof shading and orientation.
   2. Produce an initial Aurora or Energy Toolbase solar or storage design and a simple 1-page financial return analysis.
   3. Review initial screening designs with businesses to validate suitability for later grant award.
   4. Guide and consult with businesses in the EPC selection and quotation process through to final contracting and grant award stages.
   5. QA sample inspections of initial installations to ensure adherence to campaign standards
5. City of South Bend and partners will support the selected Installer(s) in resolution of any permitting issues, should they arise.

## Selected Installer(s) Responsibilities

The Selected Installer(s) on the recommended shortlist will coordinate with City of South Bend and partners to perform the necessary internal campaign communications, customer outreach and communications, site assessments, proposals and contracts, and installations as part of the SUNpowered Vibrant Places campaign and detailed in the following required responsibilities:

1. The Selected Installer(s) will perform internal campaign communication as part of SUNpowered Vibrant Places. This includes the following:
   1. Responding to communications from City of South Bend and partners within one business day.
   2. Participating in bi-weekly check-in calls with City of South Bend and partners to discuss the status of campaign participants, questions or concerns, and any changes in staffing capacity for the weeks ahead.
   3. Updating customer tracking records weekly and reporting on speed of response of lead processing against agreed time targets.
   4. Providing on request all customer proposals to Vibrant Places during the campaign to verify compliance.
2. The Selected Installer(s) will assist with all necessary customer outreach and communications as part SUNpowered Vibrant Places. This includes the following:
   1. Presenting if requested materials on commercial solar fundamentals and answering questions to educate potential participants and encourage them to sign up during public Solar 101 sessions.
   2. Contacting potential customers as soon as possible, and within three business days at the latest, once SUNpowered Vibrant Places makes pre-screened participant data available to the Selected Installer(s).
3. The Selected Installer(s) will prepare the necessary site assessments for pre-screened campaign participants as part of SUNpowered Vibrant Places. This includes the following:
   1. For all pre-screened participants, the Selected Installer(s) will prepare a free remote site assessment using satellite imagery based on shading, size, shape, and orientation of the roof to determine the feasibility of installing solar PV on the participant’s rooftop and a recommended system size. This initial assessment should also include a preliminary financial analysis based on the remote assessment and should be included as part of this initial contact. The financial assessment should state the key assumptions, including future utility electricity rate escalation. If a pre-screened participant’s roof is deemed unsuitable during this assessment, the participant must be notified accordingly as part of this initial contact.

Should the pre-screening by SUNpowered Vibrant Places prove sufficiently detailed and accurate (design and financial) to meet the requirements of this stage, the installer can skip these duties.

* 1. For participants that express interest (as determined by the Selected Installer(s)) after the initial contact and remote assessment, the Selected Installer(s) will conduct a site visit within fifteen business days after the resident’s interest is determined. Site assessments may be clustered to reduce costs for the Selected Installer(s). This site visit’s objective should be to first provide a more thorough structural, electrical, utility supply and site shading assessment to confirm the necessary information needed to develop an official proposal. Second, this site visit should also include the necessary communications with the business owner to answer their respective questions. If the customer’s roof is deemed unsuitable during this assessment, the customer must be notified, and the reasons and potential remedies explained within three business days after the site visit.

1. The Selected Installer(s) will provide an official proposal and contract for campaign participants deemed qualified and interested after the site visit as part of SUNpowered Vibrant Places. All installation contracts will be executed between the property owner and the Selected Installer(s) only after grant award, so neither City of South Bend or partners will be party to the contract. This includes the following:
   1. Selected Installer(s) will provide a detailed, custom proposal within seven business days after the site visit. This custom proposal should explain all the services provided in the turnkey price for the project (assessment, system design, permitting, installation, interconnection paperwork, etc.). The proposal must also include a visual representation of the proposed system, the participant’s energy profile, and a financial analysis that shows anticipated monthly and annual system output and financial returns. The financial analysis should state the key assumptions, **including a presumed 3% future utility electricity rate escalation**. The proposal must also detail reasons for any project-specific cost adder. Individual proposals should include the following:
      1. An image showing location of the solar array and/or battery system on the property.
      2. Array size in number of panels and total rated kilowatt size.
      3. Solar cost per watt, total cost, tax credit, net cost after tax credit, rapid depreciation avoided tax and net investment after MACRS.
      4. Separate battery system cost including all required control, transformer, monitoring, ATS, critical load panel and installation components
      5. Where PV and battery systems are installed in city center ’no export’ zones the EPC must be able to show by software modeling that the project is 100% self-consuming at all times.
      6. Estimated annual solar kWh production.
      7. Stated battery storage usable capacity (kWh) and max load amperage (starting and continuous) and power output (pulse and continuous)
      8. Ratio of estimated annual kWh per kilowatt PV production, for example: 1200 kWh annually per kilowatt PV installed
      9. Approximate annual energy usage history (received through pre-screening process from customer or I&M/AEP and partners).
      10. Estimated percent reduction of annual energy usage.
      11. Specification data sheets for panel, inverter, racking and, if relevant, optimizer and battery system.
      12. Product warranties, and availability and cost of extended warranties.
      13. Terms of payment, process, and timeline from initial deposit to final payment.
      14. The statement: “This contract is executed between [Installer name] and [name of property owner]. SUNpowered Vibrant Places, City of South Bend and other campaign partners are not parties to this contract. [Installer name] is solely liable for any claims, losses, or damages arising out of the contract.”
   2. The Selected Installer(s) must manage the permitting, interconnection, and applicable incentives.
   3. The Selected Installer(s) must provide each participant who signs a contract with them through SUNpowered Vibrant Places with the necessary documentation, including, but not limited to, the site assessment, financial analysis, structural assessment, design and equipment details, financing options, and operations manual and applicable warranty documentation.
2. The Selected Installer(s) will provide solar PV installations for all contracted campaign participants as part of SUNpowered Vibrant Places. This includes the following:
   1. The Selected Installer(s) may geographically cluster installation work to reduce costs but will be responsible for the timely completion of all work in accordance with Section 1.5: Project Timeline.
   2. All installations must be performed in conformance with applicable laws and codes, interconnection requirements, and any incentive-related installation requirements, rules, and timelines.
   3. The Selected Installer(s) should follow the [SEIA Solar Business Code](https://www.seia.org/initiatives/seia-solar-business-code) as a determinant of fair, transparent business practices to ensure solar customers are treated in a fair and honest manner.
   4. The Selected Installer(s) is highly recommended to be a current member or become a member of the SEIA.

## System Requirements

The proposed PV systems must meet the following requirements.

General system must:

1. All systems shall be code-compliant to NEC 2008 (Indiana)
2. Where required by businesses or insurance companies NEC 2017/2020 compliant systems must fully incorporate 690.1 rapid disconnect requirements (as legally mandated).
3. Central inverters shall be transformerless.
4. Electrical connection shall be on the load side of the meter.
5. Metal conduit shall be used for all above ground wiring.
6. Surface mounted metal conduit is acceptable, except in finished interior areas.
7. Only copper wire shall be used unless aluminum substitution is requested and formally approved
8. For roof-mounted systems, PV system components shall minimize or eliminate roof penetrations.
9. Designs shall comply with local code requirements including access space around the array.
10. Grid connection shall follow the utility company’s design and installation standards.
11. Performance reporting shall be provided at array or panel level and installers will provide appropriate written and verbal guidance to ensure all customers can access web or app-based monitoring and fault data.

PV modules must:

1. Be listed and reviewed on the California Energy Commission list entitled, ['Incentive Eligible Photovoltaic Modules in Compliance with SB1 Guidelines’](https://www.energy.ca.gov/programs-and-topics/topics/renewable-energy/solar-equipment-lists).
2. Have at least a 25-year power warranty with a specified performance degradation curve showing acceptable levels of performance or replacement and show achievement of a minimum of 80% of the nameplate rated power at STC by year 25.
3. Have a product warranty of at least 10 years.
4. Independent of the mounting systems, panels must be rated for snow and wind load in accordance with local permitting requirements.
5. Panels must have efficiencies of no less than 19% at Standard Test Conditions for the base price.

Inverters must:

1. Be included in the California Energy Commission list entitled ‘[List of Eligible Inverters per SB1 Guidelines](https://www.energy.ca.gov/programs-and-topics/topics/renewable-energy/solar-equipment-lists)'.
2. Have a warranty that allows for replacement due to premature failure over the specified warranty time frame and consist of a minimum of 15-year material warranty for micro inverters and 10 years for string inverters. Longer warranties will be viewed favorably.

Mounting Equipment must:

1. Be grounded in accordance with manufacturer’s specifications.
2. Be used in accordance with its manufacturer’s listed purpose and specifications.
3. Be used in accordance with manufacturer specifications for waterproofing penetrations.
4. Be installed in accordance with specific local zoning requirements beyond #2 and #3.
5. Be fitted with manufactured flashing systems for roof penetrations and shall be installed in accordance with manufacturer’s and NABCEP recommendations.

Batteries must:

1. Meet all Indiana standards for technology, safety, and grid interoperability.

# Proposal Requirements

## Installer Eligibility Requirements

Installers must meet the following eligibility requirements to submit a bid:

1. Demonstrate experience and proficiency in commercial solar PV installations. The Installer must have installed a minimum of 10 commercial solar PV projects in Indiana.
2. Be licensed or capable of being licensed to conduct business in St. Joseph County and the City of South Bend, as applicable.
3. Include on the project team at least one Journeyman or Master Electrician holding a valid and current City of South Bend electrical license to perform any electrical work on the solar PV projects and battery systems. We strongly encourage the inclusion of at least one NABCEP-certified installer at the PVIP or Associate level.
4. Formal and documented training from the battery system manufacturers showing appropriate capability in install and commissioning.
5. Installer must offer parts and labor warranty for installed arrays of no less than 1 year.
6. The Installer and any sub-contractors must also meet the following insurance requirements:
   1. General liability: $1,000,000 per occurrence, $2,000,000 in aggregate
   2. Worker’s compensation: $1,000,000 each accident, each employee, policy limit
   3. Automobile liability: bodily injury, death, and property damage combined single limits of at least $1,000,000 per occurrence covering vehicles owned, hired, or non-owned
   4. Umbrella/Excess Liability Insurance: $2,000,000 limit per occurrence

*NOTE: Official proof of exemption by City of South Bend Government for any above insurance requirements for a company is also acceptable.*

## Proposal Format, Submission, and Deadline

All proposals in response to this RFP must use the *2023 South Bend Vibrant Places Preferred Solar Installer Response Form* and include the completed form and required attachments described in the following sections. **Responses must be sent no later than 5:00 PM Eastern Time on Monday January 16th, 2023**. City of South Bend and partners retain the right to discard any responses that do not meet all the requirements described in the following sections, are incomplete, or do not provide all the required supporting documents such as staff licensing and training certifications.

## Response Form

All proposers must fill out the *2023 South Bend Vibrant Places Preferred Solar Installer Response Form* in Microsoft Excel. After completing the form, it should be saved under a file name that includes the Installer business name (e.g., “….Response Form For Sunshine Solar”). The following parts are included as separate tabs in the Excel file. Completed submissions should be sent to **[sustainability@southbendin.gov](mailto:sustainability@southbendin.gov)**

**Part 1** (Installer Profile) requests installer company information, licensing, employee numbers, install history and insurance status.

**Part 2** (Installer Capabilities) requests information regarding the Installer’s commercial construction, design, and O&M experience.

**Part 3** (Solar Equipment) requests information regarding the proposed standard options for hardware (i.e., modules, inverters, racking, rapid disconnects, optimizers etc. and flashing) that the respondent intends to typically offer participants.

**Part 4** (Battery Equipment) requests information regarding the proposed standard energy storage options for battery hardware (i.e., warranty kWh capacity, peak kW outputs and breaker sizing etc.) that the respondent intends to offer participants.

**Part 5** (Services) includes additional questions about the customer and campaign services the selected Installer(s) will provide.

**Part 6** (Additional Offerings) requests other optional offerings that the Installer can provide alongside the solar PV system. These can include services from sub-contractors and could include electrical services, roof repair or energy efficiency. Providing these services is not mandatory for proposals but will be viewed favorably.

**Part 7** (Community Benefits) asks a number of questions about the Installer’s employment practices and other benefits the Installer can offer to the community and has offered to communities in the past.

**Part 8** (Additional Information) provides space for any additional information that is relevant to the bid.

## Required Attachments

**Attachment A**: Copies of all applicable business, City of South Bend or transferable employee licensing certificates, including business license, and individual employee electrical/NABCEP licenses. Certifications and licenses must relate to local employees or those who will directly engage in install work or its supervision. Qualifications of HQ or other office locations not directly involved with day to day SUNpowered Vibrant Places work are normally not deemed relevant.

**Attachment B**: Specification (data) sheets for all typical equipment specified in Part 3 and Part 4 of *2023 South Bend Vibrant Places Preferred Solar Installer Response Form*

**Attachment C**: A copy of current insurance and liability certificates.

**Attachment D**: A copy of your standard contract agreement. This could be a redacted version of a recent contract or a contract template.

**Attachment E**: A copy of the Installer’s template commercial sales proposal, if different from the standard contract.

**Attachment F**: A copy of Installer’s standard contract language covering installation and roof penetration warranties, including language around labor warranties and product warranties.

* 1. **Submission Questions**

1. All questions regarding SUNpowered Vibrant Places, this RFP, or the *2023 South Bend Vibrant Places Preferred Solar Installer Response Form* should be sent through to **[sustainability@southbendin.gov](mailto:sustainability@southbendin.gov)** by 5 PM Friday January 6th 2023. Both questions and their answers will be shared to all RFP respondents.

# Proposal Evaluation

## Evaluation Process

Proposals in response to this RFP will be evaluated by the SUNpowered Vibrant Places Selection Committee. City of South Bend may invite the top-ranked Installers to make a brief oral presentation and be interviewed by the Selection Committee and may conduct random Quality Assurance Assessments of the Installers’ installations to confirm quality of work. City of South Bend may also seek supplemental information from any respondent at any time after official proposal opening and before the preferred solar installer list announcement. This will be limited to clarification or more detail on information included in the original proposal.

## Evaluation Criteria

Proposals will be scored according to the following criteria. The points associated with each category reflects its relative importance and alignment with the goals of SUNpowered Vibrant Places Grant.

|  |  |
| --- | --- |
| **Evaluation Category** | **Associated Points** |
| Installer’s Credentials and Commercial Experience (Response Form Part 1 & 2) | 50 |
| Proposed Quality of PV and Battery Hardware, Warranty, and Service (Response Form Parts 3 and 4) | 30 |
| Installer’s Community Benefits and Additional Offerings  (Response Form Parts 5 thru 8) | 20 |
| **Total points** | **100** |

## Acceptance and Award Process

City of South Bend reserves the right to make multiple installer awards, one award, or no rewards because of this solicitation. Upon acceptance of a proposal and intent to award, the selected Installer(s) will be required to execute and return all required project documents and certificates of insurance within 10 days from the Notice of Award and/or Preferred Installer status listing. Should the Selected Installer(s) fail or refuse to execute the project documents in this time period, the City of South Bend can accept other proposals.