

Best Practices Guide to Collaborative Solar Procurement

Summary and Overview of Best Practices: The 12-Step Process

Step 1 – Recruiting Participating Agencies

- **Key Participants:** Convener(s), Participating Agencies, Lead Agency (if identified)
- **Desired Results:** Initial participants indicate interest and agree to proceed with site identification and assessment in the next stage.

Step 2 – Initial Participant Questionnaire

- **Key Participants:** Convener(s), Participating Agencies, Lead Agency (if identified)
- **Desired Results:** List of potential participating organizations with initial site opportunities and key stakeholders identified.

Step 3 – Solar Project Workshops

- **Key Participants:** Convener(s), Lead Agency, Technical and Financial Consultant(s) (if identified), Participating Agencies
- **Desired Results:** All participants have developed common understanding about solar projects, financing, collaborative procurement, key metrics, timelines, and expectations. Lead organization has been identified.

Step 4 – Consolidated Analysis of Sites

- **Key Participants:** Lead Agency, Technical and Financial Consultant(s), Participating Agencies & Approval Authorities, Convener(s)
- **Desired Results:** Compelling, technical overview of collaborative procurement; bundles identified, given specific criteria (technology, size, offset, location, etc.); talking points and supporting materials describing expected benefits are provided to participating agencies.

Step 5 – Internal Decision Maker Consolidation

- **Key Participants:** Lead Agency, Participating Agencies & Internal Stakeholders (including Facility Management, Legal, Finance, Elected Officials), Approval Authorities, Technical and Financial Consultant(s)
- **Desired Results:** Participating Agencies obtain buy-in to proceed in procurement process.

Step 6 – Design of Procurement Process and Documents

- **Key Participants:** Lead Agency, Participating Agencies & Internal Stakeholders (including Facility Management & Legal), Technical and Financial Consultant(s)
- **Desired Results:** All participants agree to procurement process, template contract documents prepared with mutually agreed upon and required standard terms. All participants understand process, risks and opportunities.

Step 7 – Request for Proposals

- **Key Participants:** Lead Agency, Technical and Financial Consultant(s)
- **Desired Results:** RFP issued, site walks conducted, bid conferences held, bids received.

Step 8 – Proposal Evaluation

- **Key Participants:** Lead Agency, Technical and Financial Consultant(s), Evaluation Committee (including Participating Agency representatives)
- **Desired Results:** Evaluation process generates winning bidder(s), selected for each bundle through competitive process using best value methodology.

Step 9 – Negotiations and Award

- **Key Participants:** Lead Agency, Participating Agencies & Internal Stakeholders (Facility Management & Legal), Technical and Financial Consultant(s), Awarded Vendor(s)
- **Desired Results:** Collaborative negotiations process results in successful award and signed contracts with qualified vendor for each bundle, within agreed upon timeline. Agencies approve contracts and indicate financing methodologies.

Step 10 – Installation Project Management and Project Financing Complete

- **Key Participants:** Qualified Awarded Vendor(s), Participating Agencies & Internal Stakeholders (Facility Management & Finance), Technical and Financial Consultant(s), Lead Agency in supporting role
- **Desired Results:** Executed contracts define project management responsibilities and milestones for completing initial site due diligence, CEQA, design and engineering, safety, construction site management, etc., and projects proceed successfully. Financing assured.

Step 11 – Commissioning and Operations

- **Key Participants:** Qualified Awarded Vendor(s), Participating Agencies & Internal Stakeholders (Facility Management), Technical Consultant(s), Lead Agency in supporting role, Convener(s)
- **Desired Results:** Successful project installations demonstrate energy production and savings over term of agreement.

Step 12 – Celebration of Success

- **Key Participants:** Qualified Awarded Vendor(s), Participating Agencies & all stakeholders, Technical and Financial Consultant(s), Lead Agency, Convener(s)
- **Desired Results:** Participants internal and external stakeholders, regional community and government agencies are aware of the tax payer savings, positive workforce and environmental benefits of the effort and have indicated support for future projects.

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