



Request for Proposals Checklist

This checklist provides Alberta municipalities with a list of best practice items to include in procurement processes involving a request for proposal (RFP). This checklist is designed for systems compliant with Alberta's [Micro-Generation Regulation](#)*.

Information to Provide to Applicants

1. PROJECT OVERVIEW:

- Project description
- Objectives of the project (e.g. maximize available space, most cost-effective given a certain budget, offset all electrical energy consumption, etc.)
- System size, if known, or other characteristics which will determine size (e.g. space available, annual electricity consumption, available budget, etc.)
- Maximum project budget
- Project timeline
- Funding sources and/or grants or rebate programs being pursued for the project
- Contract type required if known and applicable (e.g. stipulated price, time and materials, etc.)
- Contact information for RFP inquiries

2. BUILDING OR SITE DESCRIPTION:

- Desired location of the electricity generation system (e.g. ground, roof, building adjacent, etc.)
- Description and address of building or site, including images/schematics/building or site drawings, if available
- Description of available project space and building characteristics such as building location, orientation (e.g. north, south, east, west), building age, structural integrity (note if a structural assessment has recently been completed), and include information on whether any other existing renewable energy systems or other onsite power generators (e.g. CHP) are present
- Site-specific design constraints (e.g. local design or aesthetics policies or limitations)

* The Alberta Electric Utilities Act Micro-Generation Regulation is available at: http://www.qp.alberta.ca/documents/Regs/2008_027.pdf

3. LOAD PROFILE & SYSTEM CHARACTERISTICS:

- Total annual electricity and natural gas consumption of the site from the past 3 years and the amount to be offset
- Information on the monthly electricity consumption (in kWh) and natural gas consumption (in GJ) of the site (a full year graph of monthly energy use including the past 3 years of data is ideal). This information can be found on the site utility bills.
- Specify that the system must be grid-connected and compliant with the *Alberta Microgeneration Regulation*
- Specify details of any existing onsite electrical distribution system (e.g. 120/240V, 208V, 480V, single phase, three phase, etc.)
- Identify electricity retailer for the building or site
- Include other relevant electrical specifications/requirements

4. SCOPE OF WORK:

- Desired services may include any of the following items. Clearly describe which of the following items should be included in the proposal:
 - Electricity generation system design
 - Building structure engineering assessment
 - Installation and commissioning of electricity generation system (e.g. modules, inverters, turbines, generators, heat exchangers, grid connections, etc.)
 - Completion of all permitting applications (e.g. building, electrical, and development), utility interconnection applications, and inspections, in order to comply with local regulations and codes
 - Completion of a site survey to locate any underground services
 - Completion of applicable rebate or incentive application forms or documents
 - Inclusion of any data displays or data management and reporting systems
 - Training and/or operation and maintenance manuals
 - Arrangements for ongoing operation or maintenance
 - Any additional equipment warranties (beyond manufacturer warranty)
 - Any financing services to be included
 - Any other potentially necessary surveys or approvals that the project may require (e.g. environmental assessments, etc.)

5. SITE VISIT:

- If a voluntary site visit is to be offered to potential proponents, include all relevant details (e.g. date, time, onsite contact information)

Information to Request from Applicants

6. SYSTEM DESIGN:

- Description of the proposed electricity generation system, including a preliminary design and drawings/renderings which illustrate the proposed system layout at the site
- Description of key components, and spec sheets for modules, inverters, generating units, etc.
- Warranty details for the solar modules, inverter, generators, turbines, and any other critical equipment
- Total rated capacity (watts DC or AC), estimated fuel usage, and estimated annual energy yield (kWh AC)
- Description of any data monitoring, tracking, or display equipment
- Description of operation and maintenance service plan, if applicable, and any associated subscription costs
- Estimated annual energy savings in kWh and/or GJ and \$ from the system as well as estimated simple payback based on projected energy prices and any other relevant economics

7. COMPANY DETAILS AND EXPERIENCE:

- Name and role of project team members (including any relevant certifications)
- Name of subcontractors and their role in the project
- Relevant experience and references for systems as similar as possible to the desired request (
- Company safety certifications (WCB coverage, COR certification, etc.)
- Confirmation of company insurance certificates (general liability, or other insurance that may be required for the company to be working on municipal sites)

8. WORK PLAN AND SCHEDULE:

- Detailed proposed workplan and schedule for the project including time and duration of any activities that could disrupt regular operation

9. PROJECT COSTS:

- Total cost of the project
- Request a breakdown of the cost estimate based on the desired services; a simplified breakdown may be as follows:
 - Design costs
 - Permitting and engineering costs
 - Equipment costs
 - Monitoring systems
 - Installation labour costs
 - Other costs
- If any services are optional, request their costs be clearly separated from the required services, to enable a fair comparison of costs across proposals

Evaluation Process and Selection Criteria

10. EVALUATION:

- Provide a high-level overview describing how proposals will be evaluated (e.g. number of reviewers, time, etc.)
- RFP evaluation criteria and weighting should be clearly identified and frequently include:
 - Company's relevant experience
 - Proposed electricity generation system design, specifications and warranties
 - Overall cost and system economics
 - Electrical energy output
 - Quality and conformance of proposal

11. SUBMISSION INFORMATION:

- Provide contact information for someone, so proponents have someone to reach out to regarding any RFP questions
- Provide clear details on how proponents are to submit their proposal, including:
 - Deadline for accepting submissions
 - Address and addressee for submissions
 - Desired format for submissions (e.g. digital and/or physical)
 - Number of physical copies (if required)

For questions about this checklist, please contact the MCCAC by email at contact@mccac.ca.