**GEOTHERMAL URBANA CHAMPAIGN**

**EXHIBIT A**

**SCOPE OF WORK**

The selected company will provide design and installation of residential and commercial geothermal systems for a group of property owners in Champaign County, IL, Piatt County, IL, and Vermilion County, IL, in accordance with the general scope of services outlined below. Proposers may use this outline as a guide for organizing a scope of work for their proposal, but are encouraged to expand upon, refine or suggest alternative approaches based on previous experiences with similar projects.

Installations provided by the company may take the form of cash purchase and/or financing. The company may offer financing and purchasers may acquire separate financing.

The purpose of this project is to enable the installation of geothermal systems on homes and commercial buildings in the program territory at a price lower than that typically offered by the company. The selected company will access cost efficiencies through a program which combines lowered customer acquisition costs with group purchasing and installations.

Between the months of October 2020 and April 2021, program partners will promote and deliver educational workshops at easily accessible public locations or online as public health conditions dictate. As prospective participants are identified who wish to proceed with the process, their names and contact information will be provided to the selected company.

The selected company must report **weekly progress in a mutually agreeable format** to the MREA regarding campaign progress and lead status. MREA may choose to reduce this frequency if justified. Progress reports should include the following:

* Name, address, phone, and email as available for each sales lead
* Date for status changes of each sales lead and sum of all statuses
  + Contacted
  + Declined Site Assessment
  + Scheduled Site Assessment
  + Cost Estimate Sent
  + Contract Signed
  + Cost Estimate Declined
  + System Energized
  + Type of System (commercial/residential, single/2-stage/variable speed, loop field type, adders/subtractors, etc)
  + Size of System
  + Price of System
* Incremental payback
* Estimated Year 1 energy savings

The selected company will provide site assessments and system design cost estimates for each participant free of charge. Individual system designs should minimize impacts to the property and be installed to take into consideration the preferences of the owner while minimizing project costs and maximizing the efficiency of the geothermal system.

The installations will be carried out by the selected company in conformance with all applicable laws and codes in the resident or business utility service area.

For each participating residential or commercial customer the selected company(ies) will be responsible for all aspects of the geothermal installation, including but not limited to:

* securing all required permits (typically environmental, building, and electrical permits),
* calculating load estimates
* assist completing and submitting all incentive applications,
* scheduling and passing all inspections,
* providing each owner with information regarding energy efficiency,
* providing each owner appropriate documentation and guidance for applying for the federal tax credit and where applicable federal commercial asset depreciation tax credit,
* providing introductions and support materials to banks, credit unions, and other interested financing entities as needed.

**Note:** To ensure that participants in the group buy are receiving complete and accurate site assessments and cost estimates, the MREA reserves the right to review site assessments and cost estimates given to potential customers as part of the program.

**Note:** Program may be extended to another round of group purchase at mutual consent of MREA and selected company(ies).

**Note:** The selected company(ies) must secure all required permits from the relevant local governments.

**EXHIBIT B**

### **PROPOSING GEOTHERMAL INSTALLER QUALIFICATION STATEMENT**

**Proposing Geothermal Installer Qualification Statement:**

I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, have read the entire contents of the RFP, and certify that Proposing Company has necessary purchasing contacts, equipment, storage facilities, experience, ability and capital to furnish the proposed products in the manner described and to perform the required work satisfactorily.

I acknowledge that the Proposing Company possesses the following certifications: (Check appropriate boxes to indicate compliance.)

□ Certification through NATE (required)

□ GAOI Company Installation Certification (required)

□ Principal place of business located within Champaign County, Piatt County, or Vermilion County, Illinois (not required, but worth additional points).

I certify that the Proposing Company agrees to abide by the GAOI Code of Ethics: <https://www.gaoi.org/membership-information/> .

Authorized Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title of Signatory: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Proposing Company declares the following legal status in submitting this proposal:

□ A corporation organized and existing under the laws of the State of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

□ A partnership

□ An individual doing business as \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Company Name FEIN

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address City/State/Zip Code

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Proposer’s Signature Name & Title

**EXHIBIT C**

**Geothermal Urbana-Champaign 2020**

Baseline cost per ton price assumes:

* + 1. Cost for complete ENERGY STAR, two-stage, geothermal heat pump installation including vertical loop field with minimum 150 feet of bore with three-quarter inch piping per ton..
    2. Cost of complete site assessment/cost assessment for each program enrollee
    3. $5,000 administrative fee which will be paid to the MREA
    4. $100.00/ton fee (after program total exceeds 50 tons) which will be paid to the MREA. The selected company will be invoiced by MREA as systems are completed.
    5. Installation
    6. The geothermal system must include at least a *five-year workmanship warranty* that covers any defects in the workmanship of the installation at no charge to the owner. The warranty must be provided by the contractor that installs the geothermal system.

What is NOT included in baseline price:

1. Items listed in the adders of Exhibit C
2. Upgrades as requested by the program participant (see below)

**EXHIBIT C (cont’d)**

**Geothermal Urbana-Champaign 2020**

|  |  |
| --- | --- |
| Proposing Company |  |
| Date |  |

**PART 1: BASELINE PRICE INFORMATION\***

|  |  |  |
| --- | --- | --- |
|  | EXAMPLE | Basic ENERGY STAR Certified |
| Baseline system as described in Exhibit C, item 1 | Brand x model y type z |  |
| Typical price pre-incentive (what you would charge for outside of the group buy) | $5,000/ton | $ |
| Base Price, Participant Capacity <50 tons | $4,500/ton | $ |
| Discount at Participant Capacity 51-100 tons | $4,000/ton | $ |
| Discount at Participant Capacity 100-150 tons | $3,800/ton | $ |
| Discount at Participant Capacity >150 tons | $3,600/ton | $ |

**\*Assumptions: 4 ton, four 150 foot bore fields, typical water to air system, no adders.**

**PART 2: ADDERS/SUBTRACTORS SCHEDULE**

|  |  |  |
| --- | --- | --- |
| **Other Cost Factors** | **Amount of price increase or decrease (+ or -)** | **Notes** |
| Electric backup heat |  |  |
| Hot water assist (desuperheater) |  |  |
| Special loop field conditions/ modifications (such as larger loop field, longer than usual header requirements, etc.) |  |  |
| Hot water assist storage tank |  |  |
| New electric hot water heater |  |  |
| Additional plumbing |  |  |
| Gas furnace back up with split system |  |  |
| Electrical upgrade |  |  |
| Ductwork upgrade |  |  |
| Filter upgrade / Air Purifier option |  |  |
| Humidifier |  |  |
| Surge protector |  |  |
| Carpentry work |  |  |
| Wifi-enabled thermostats and software |  |  |
| Performance monitoring |  |  |
| Down flow unit |  |  |
| Extended Warranty |  |  |
| Larger electric heat |  |  |
| Zoning system equipment |  |  |
| Open Loop system |  |  |
| Horizontal Loop system |  |  |
| Single-stage heat pump |  |  |
| EER/COP upgrade 1:  (more efficient 2-stage system with minimum 30 EER rating) |  |  |
| EER/COP upgrade 2: (top-of-the line equipment with Inverter technology or equivalent) |  |  |
| Increase/subtract for larger/smaller ton system |  |  |
| Extra Loop Field Length |  |  |
| Horizontal bored loop field |  |  |
| Heat Pump with dedicated 100 percent on demand Hot Water capability |  |  |
| Electrical service upgrade |  |  |
| Variable speed flow center |  |  |
| Geothermal radiant/water to water |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

(Proposing company may add more rows if necessary.)

**Note:** If you would like to propose an additional pricing scheme that differs from the above format, you may do so. You MUST, however, submit pricing in the above format, and any additional pricing scheme/format is optional and will not factor into installer selection. If your proposal is selected, your alternative pricing scheme may be used upon approval.

**PART 4: ADDERS NARRATIVE**

1. We have noticed that there are sometimes dramatic differences between the base price and actual price paid due to the average adder value. This varies between programs. Accordingly, what do you expect to be typical adders?
2. Based on your previous answer, please estimate how much you expect people to pay on average in this program.