

Solar Campaign Installer Selection Timeline and Monthly Checklist

Identify an installer selection team (three to four members), including one INSTALLER LIAISON. Duties include:

- List personal contact information in the Request for Proposals (RFP)
- Receive proposals from installers and distribute to selection committee members
- Manage all communication with installers:
 - Send RFP to installers and answer any installer questions about the RFP
 - Request clarification or more information from installers if necessary
 - Invite installers for interviews and communicate final selection decision to all bidding installers

Month 1	<input type="checkbox"/> Reach out to local solar installers – are they interested? <input type="checkbox"/> Download and customize the Solar Campaign RFP (Request for Proposals) Template <input type="checkbox"/> Download and customize the Solar Campaign Proposal Template <input type="checkbox"/> Consult the rest of the volunteer team as needed
Month 2	<input type="checkbox"/> Send RFP and Proposal Template to installers (<i>allow at least three weeks between sending the RFP and the deadline for receiving proposals</i>) <ul style="list-style-type: none"> • Save RFP as a PDF before sending • Send Proposal Template as a Microsoft Word document (<i>and remind installers to send it back to you as a PDF</i>) • Send both documents together to the list of installers AND to any relevant renewable energy trade associations who can post the RFP for you
Month 3	<input type="checkbox"/> Receive proposals from installers <input type="checkbox"/> Selection team meeting to review proposals and choose which installers to interview (<i>allow time for everyone to read the proposals prior to meeting</i>) <input type="checkbox"/> Invite installers to interview (<i>the date of interview day will be announced in the RFP – send interview invitations with specific interview times at least two days in advance of interview day</i>) <input type="checkbox"/> Interview two to three installers <input type="checkbox"/> Call installer references
Month 4	<input type="checkbox"/> Choose a partner installer <input type="checkbox"/> Let other installers know they have not been chosen <input type="checkbox"/> Schedule a meeting with the volunteer team and the installer (<i>hold meeting at least three weeks prior to campaign kick-off</i>) <input type="checkbox"/> Create a list of “why we chose this installer” talking points and share with the rest of the volunteer team
Month 5	Kick-Off Event

See “Selection Criteria and Due Diligence”

See “Installer Interview Kit”