

Best Practices for Collaborative Solar Purchasing

12 steps that guide potential solar buyers through the process of collaborative solar purchasing

Graphic adapted from *Purchasing Power: Best Practices Guide to Collaborative Solar Procurement*. Goodward, Jenna, Rachel Massaro, Benjamin Foster, and Caroline Judy. Washington, DC: World Resources Institute. Report available at www.wri.org/publication/purchasing-power.

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1 Early regional recruiting	RESULTS: Initial participants indicate interest and agree to proceed with site identification and assessment in next stage.
2 Initial participant questionnaire	RESULTS: List of potential participating organizations with site opportunities and considerations documented.
3 Solar Project Workshop	RESULTS: All participants share common understanding about the basics of collaborative purchasing, key metrics to evaluate, timeline, and expectations of them. Lead organization has been identified.
Consolidated analysis of sites	RESULTS: Compelling technical overview of total purchase size and individual bundles. This initiative overview is consolidated into packet including talking points explaining expected benefits for participants and lead organization.
5 Internal desicion maker consultation	RESULTS: Buy-in to proceed in procurement process to drafting RFP is obtained from decision makers in each participant/lead organization.
Design of procurement process and documents	RESULTS: All participants agree to procurement process, template contracts, and standard terms with understanding of risks and opportunities.
7 Request for proposals	RESULTS: RFP issued with compelling bids received from potential vendors.
Proposal evaluation	RESULTS: Winning bidder is selected for each bundle through competitive process that ensures best-value vendor selection.
9 Negotiations and awards	RESULTS: Negotiations are complete with successful award and signed contracts with a qualified vendor for eachbundle, within agreed timeline.
10 Installation project management	RESULTS: Solar PV systems are properly built to meet or exceed specifications and safety standards.
Commissioning and operations	RESULTS: Successful solar installations demonstrate energy production and savings as planned for 25 years or more.
12 Celebration of success	RESULTS: Participants' internal and external stakeholders, regional community, and government are aware of the positive impact of this effort and support future projects.