



# ADDENDUM to

## REQUEST FOR PROPOSALS:

### Puerto Rico Resilient Schools Microgrid Project

November 21, 2018

This document represents the Rocky Mountain Institute's addendum to the originally distributed Request For Proposal (RFP) for the Puerto Rico Resilient Schools Microgrid Project published on November 6, 2018. This document has been updated based on observations made and questions received after the site visit on Tuesday November 13, 2018. The updates have been directly updated in the RFP. Bellow is a list of the specific changes made to the November 6th, 2018 version:

- **Contact Information:**
  - Ana Sophia Mifsud's cell phone was included
  - Megan Kerins was listed as a point of contact
- **Overview:** The size of the project was updated to approximately 75 kWdc of solar PV and 134 kWh of lithium-ion battery storage based on site visits and new loads further described in Exhibit A.
- **Project Specifications- Overview:** The work hours allowed for the installation have been updated and specify that:
  - All work that can be done while the school is occupied should be done Monday-Friday between 8am-5pm.
  - Any disruptive or dangerous work (like roof replacement or shutting down electricity) needs to be coordinated with the school administrator and done when the building is not occupied.
- **Project Specifications -Sizing and Design:**
  - New PV and battery sizes were included to reflect updated loads.
  - An additional statement was added to clarify that system size can be reduced if an energy efficiency opportunity was identified during the site visit that would lead to a smaller sistem size and would lead to lower system cost.
  - Battery size was clarified as being nominal energy of the battery and assumptions on sizing were included.
- **Project Specifications- Design and Installation Requirements (General):** New statement was added to clarify that controls should prioritize the energy sources in the following order: PV, Grid, Batteries.



- **Project Specification- Design and Installation Requirements (Roofing):** Further clarity was provided on the roofing scope of work, including instructions to:
  - Use your best judgment based on your assessment of the roof to provide the most cost effective solution that assures a 10 year waterproofing warranty.
  - Remove and replace any roofing unable to support PV technology weight and that could pose a danger to school student and staff if that is the only roof deemed appropriate for the installation.
  - Repair any problems with the roof that could compromise the project.
  - For all roofs included in the project, apply necessary coatings to ensure roof waterproofing for 10+ years.
  - For locations installing PV panels on multiple rooftops, all rooftops are subject to the above mentioned specifications.
  - EPC contractor may install PV panels on a roof adjacent to the intended use area, so long as the line losses involved do not exceed the maximum, as stated in the “Conductors” requirements.
  - In the Comerio school, EPC must install two ceiling fans in the library with an energy consumption less than or equal to what is outlined in Exhibit A in the load profile.
- **Project Specifications- Design and Installation Requirements (Batteries):** clarified that batteries should be installed in a container that is appropriate for its environment (indoor/outdoor) and enclosure should be electrically isolated so as to protect the safety of school staff and children.
- **Selection Criteria:** The selection criteria was modified to emphasize proposed equipment, design, and quality plan and deemphasize project timeline.
- **Important Notes:** A sentence was added to clarify that RMI can accept donation in the form of any equipment or material needed for the installation or in donated labor.
- **Submission Instructions and Deadline:** a note was added to clarify that all proposals should be emailed to Ana Sophia Mifsud and Megan Kerins via email.
- **Exhibit A Load profiles:** The loads for each school were updated and modified based on site observations. These changes included:
  - Separation of load profiles for each school
  - Updated number of laptops for each school
  - Added refrigeration load in Aguas Buenas school increased from 2 to 3
  - Included ceiling fans in Comerio school library
- **Exhibit D- Donated Equipment:** Clarified that any part of the cost of the project can be donated and adjusted Exhibit D to allow for clear donation reporting.
- **Exhibit F - Background Check:** additional background check requirements were listed in Exhibit F required for all staff working onsite.



REVISED  
REQUEST FOR PROPOSALS:  
Puerto Rico Resilient Schools Microgrid Project  
Wednesday, November 21, 2018



**Project Summary**

**Project Name:** Puerto Rico Resilient Schools Microgrid Project, Phase I (Comerio, Aguas Buenas, and Corozal)

**Task and objective:** Rocky Mountain Institute has partnered with Save the Children to publish a Request for Proposals (RFP) for prospective bidders for **three (3)** resilient solar microgrids across three (3) public school sites to serve critical loads for those schools.

**Contact Information**

**Primary Point of Contact:** Ana Sophia Mifsud, RMI

**Contact Email:** [amifsud@rmi.org](mailto:amifsud@rmi.org)

**Phone:** +1 (305) 305-2029

**Secondary Point of Contact:** Megan Kerins

**Contact Email:** [mkerins@rmi.org](mailto:mkerins@rmi.org)

**Important Dates**

<b>Event</b>	<b>Date</b>
Mandatory Site Visit	Tuesday, November 13, 2018
Request for Clarification Submission Deadline	Wednesday, November 28, 2018
Final Responses to Request for Clarification	Friday, November 30, 2018
Proposal Submission Date	Wednesday, December 5, 2018
Project Award Date	Wednesday, December 12, 2018

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## TABLE OF CONTENTS

<b>I. Introduction and Project Background</b>	<b>4</b>
<b>II. Overview</b>	<b>5</b>
<b>III. Site Details</b>	<b>5</b>
A. Project Locations	5
B. Current Energy Sources	6
<b>IV. Project Specifications</b>	<b>6</b>
A. Site Layouts	7
B. Sizing and Design	10
C. Design and Installation Requirements	10
<b>V. Scope of Work and Deliverables</b>	<b>15</b>
A. Installation	15
B. Documentation	15
C. Employee Policy	15
D. Equipment Availability	16
E. Net Energy Metering	16
F. Additional EPC Responsibilities	16
<b>VI. Selection Criteria</b>	<b>16</b>
<b>VII. Proposal Requirements</b>	<b>16</b>
<b>VIII. Important Notes</b>	<b>17</b>
<b>IX. Submission Instructions &amp; Deadline</b>	<b>18</b>
<b>X. Execution of EPC Agreement</b>	<b>18</b>

## EXHIBITS

- Exhibit A – Load Profiles*
- Exhibit B – Selection Criteria*
- Exhibit C – EPC Qualification Form*
- Exhibit D – Equipment and Pricing List*
- Exhibit E – Project Timeline*
- Exhibit F – Child Safeguarding Policy*



## I. Introduction and Project Background

On September 20, 2017, Hurricane Maria struck Puerto Rico, setting off the largest power outage in U.S. history. The entire Puerto Rico public school system was closed for two months following Maria. School-aged children in Puerto Rico have lost more than 13 million cumulative days of learning, with no comprehensive plan to recover this lost learning time. Limited energy availability also impacted schools' ability to provide meals to students. While some schools now have diesel generators, Puerto Rico's school system remains vulnerable to extended grid outage from future hurricanes.

The nonprofit organizations, Rocky Mountain Institute (RMI) and Save the Children are partnering to develop solar-plus-storage microgrid projects at up to 12 public schools in communities severely impacted by Hurricane Maria. These schools were selected following in-depth assessments of the damage and material losses suffered by the schools, access to after-school programs, and reported psychosocial distress of children, their caregivers, teachers, and school social workers. The 12 microgrid projects will minimize lost learning due to power outages and ensure students are able to return to school as soon as possible in the event of future emergency or grid outage. In addition to becoming resilient learning environments for the 2018-2019 academic year and beyond, these schools will become unofficial locations for emergency preparedness for the community.

This RFP is an aggregated competitive procurement, aiming to provide resilient, renewable energy systems at **three (3)** schools to support their continued operation following future storms and extended power outages. While other public schools in Puerto Rico have closed, these high-enrollment schools have a very low likelihood of closure because they have accepted additional students from surrounding schools.

The scope of the proposed solar microgrid project must:

1. Include appropriate subcontracting for roof repair (or replacement) and waterproofing prior to the solar microgrid installation phase.
2. Include solar photovoltaic system and battery energy storage system, plus microgrid control capabilities such that the system is capable of powering school equipment both during normal grid operating conditions and during outages.
3. Integrate with existing energy generation systems, including the utility grid.
4. Power critical loads to support school operation during both grid outages and normal operation.
5. Be capable of exporting electricity to the grid in order to receive net metering credits.
6. Ensure all lighting in the kitchen, libraries, and administrative office connected to the microgrid system are LEDs.
7. Comply with the Resilience measures described in the *Design and Installation Requirements* section.

The project scope may also include:

8. Implementing energy efficiency measures, such as retrofitting refrigerators



9. Bringing the existing electrical infrastructure up to applicable electrical codes and standards; these include but are not limited to relevant NEC 2017, UL, IEC, and IEEE technical codes.
10. Engaging in educational programming with school staff.

## II. Overview

RMI is issuing this Request for Proposals (RFP) for turnkey Engineering, Procurement, and Construction (EPC) services to be provided at three public schools in Puerto Rico.

The objective of this RFP is to solicit competitive proposals from qualified and experienced contractors (“Bidders”) to provide three Puerto Rico public schools with cost-effective solar photovoltaic (PV) microgrid systems comprising approximately **75 kWdc of solar PV and 134 kWh of lithium-ion battery storage**, collectively referred to here as the “Project”.

The desired outcome of this RFP is the successful negotiation and execution of an EPC Agreement for the scope of services described herein. Only one successful bidder shall be awarded the work. The goal of this RFP is to contract an EPC firm through an EPC Agreement that will design and build the systems on the three public school sites.

Separate proposals for operations and maintenance (O&M) services for up to a 10-year term following installation will be accepted. Bids for O&M are optional (not required to be considered for award of the primary EPC contract) and will be considered separately.

## III. Site Details

### A. Project Locations

#### School 1

*Site Name:* Comerio  
*Address:* Escuela Maria C. Santiago  
Carr 172 Km 1 Hm 5, Bo. Naranjo Sector Sabana  
Comerio, PR ([Google Maps](#))  
*Coordinates:* 18.222936, -66.202087  
*Number of Students:* 350 enrolled

#### School 2

*Site Name:* Aguas Buenas  
*Address:* Escuela Su Bayamoncito  
Carr 156 Km 42 Hm 3 Bo. Bayamoncito  
Aguas Buenas, PR 00703 ([Google Maps](#))



*Coordinates:* 18.239032, -66.161983  
*Number of Students:* 320 enrolled

### **School 3**

*Site Name:* Corozal  
*Address:* Esc Demetrio Rivera  
Carr 802 Bo Palmarito,  
Corozal, PR 00720 ([Google Maps](#))  
*Coordinates:* 18.268788, -66.339629  
*Number of Students:* 324 enrolled

## **B. Current Energy Sources**

All of these schools are PREPA customers.

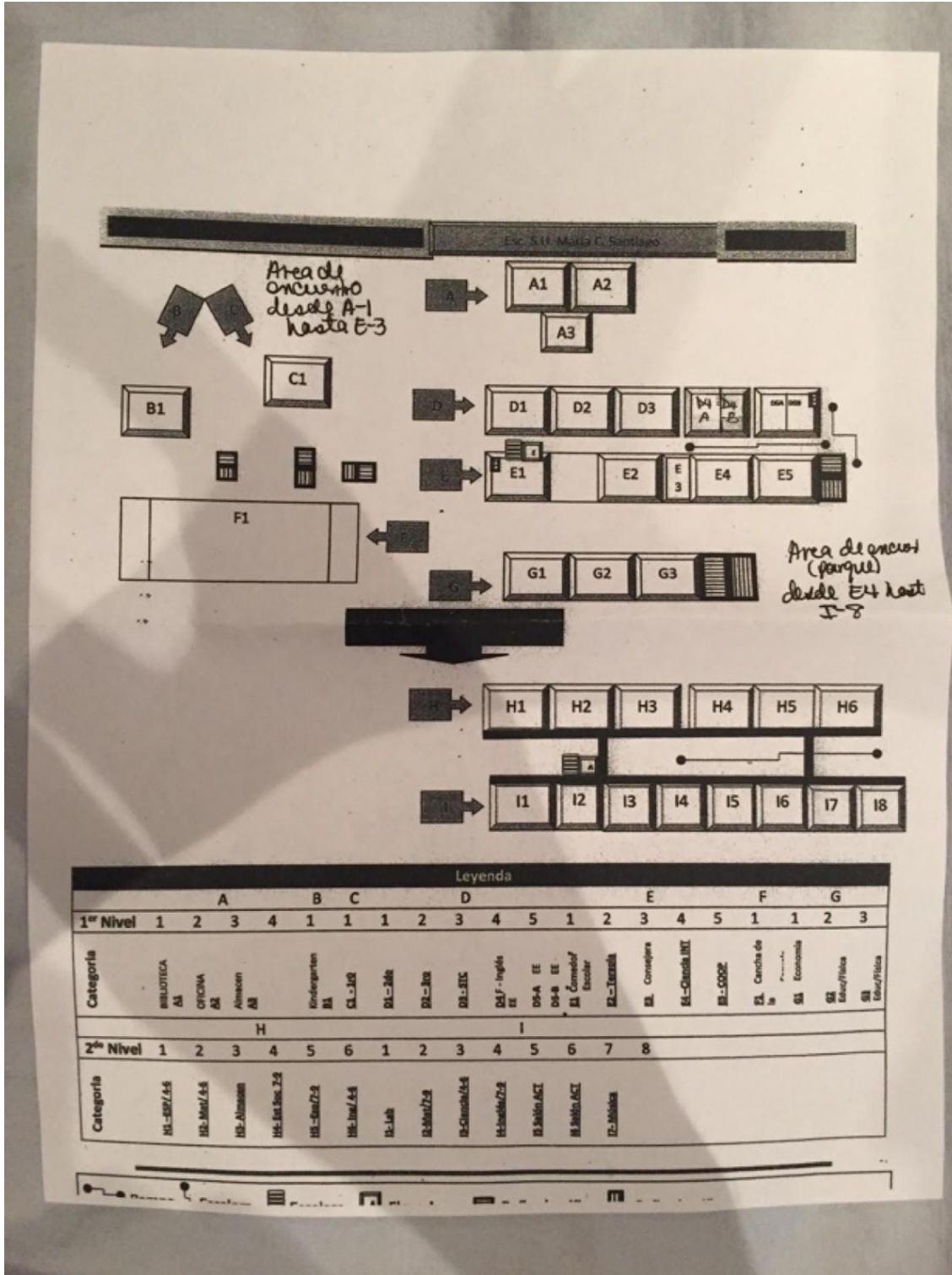
## **IV. Project Specifications**

1. All major work that might be disruptive to students such as onsite roof repair (or replacement) and electrical repair work that requires shutting off electricity shall occur during January 8– 11, 2019 or outside school hours. All other work must be done during normal school hours Monday-Friday from 8-5pm.
2. The EPC Contractor shall create a **critical loads circuit** for specific rooms and end uses, listed in **“Exhibit A - Critical Loads.”** All switches and sockets that are connected to this circuit shall be clearly and obviously labeled as such.
3. All lighting connected to the microgrid system shall be LED lighting.
4. The re-roofing work must include a waterproofing guarantee such that the schools’ roofs remains free of water damage for 10 years.
5. For roofs deemed too damaged to support PV loads and remain free of water damage for 10 years, the roof must be replaced. This work shall be proposed at the EPC’s discretion.
6. Please locate all equipment such that serviceability is maximized and conduit and wire run lengths are minimized.
7. Wiring connected to the microgrid should be up to NEC 2017, UL, IEC, IEEE, and other relevant codes.



A. Site Layouts

Site 1: Comerio

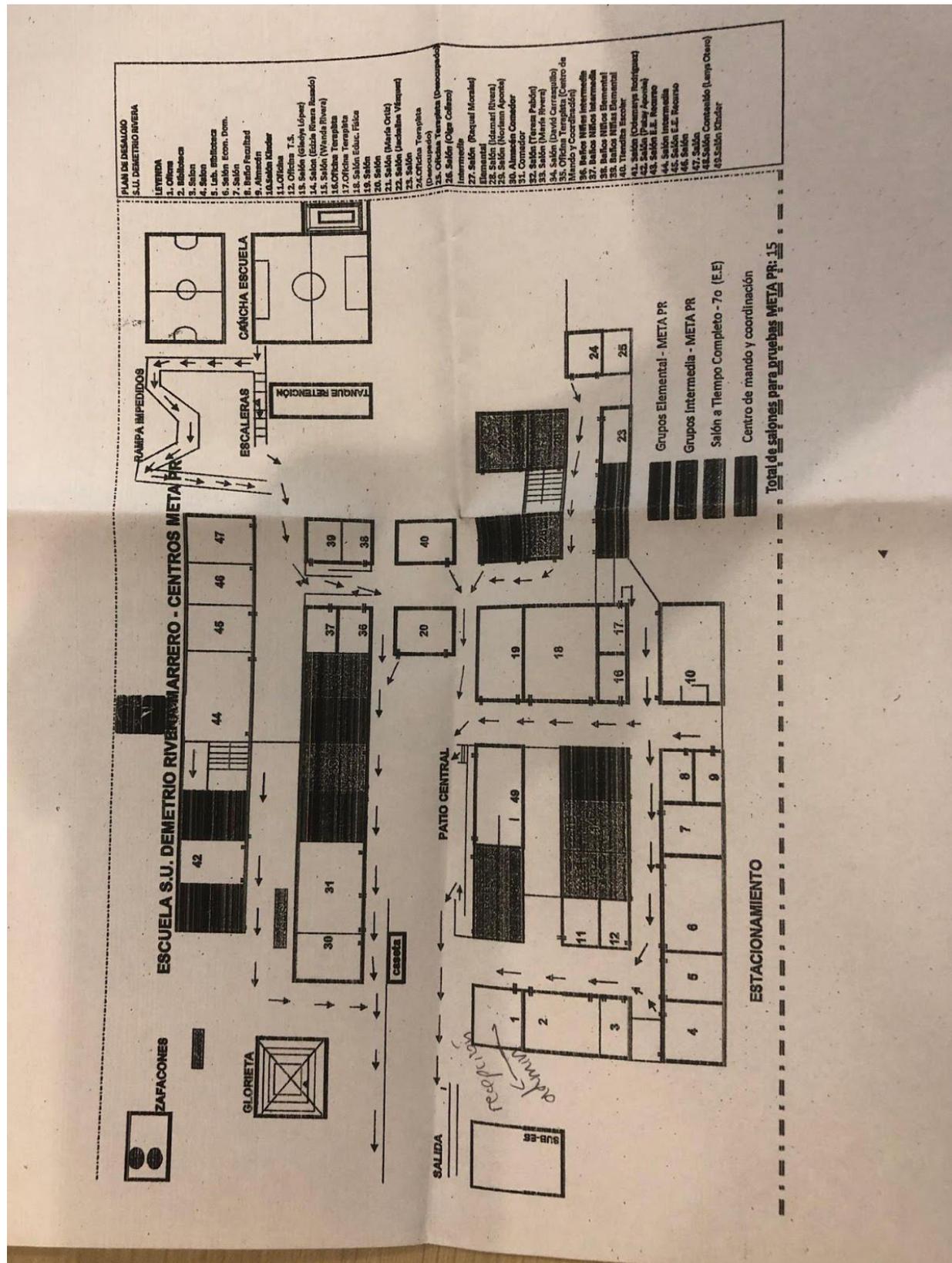


Site 2: Aguas Buenas





Site 3: Corozal





## B. Sizing and Design

The solar microgrid shall be designed to be +/- 5% the solar and usable battery storage capacity described in the table below unless an appropriate energy efficiency intervention is planned for and implemented that would justify reducing the size of the system. In order to justify system size reduction please provide a detailed rationale in the proposal and include the energy efficiency intervention costs in the bid.

#	Site	Proposed Solar Capacity Target (kWdc)	Proposed Battery Storage (kWh)**	Proposed Usable Battery Storage (kWh)
1	Comerio	22 kWdc	42 kWh	30 kWh
2.1	Aguas Buenas-Kitchen	21 kWdc	46 kWh	33 kWh
2.2	Aguas Buenas-Library	6 kWdc	4 kWh	3 kWh
2.3	Aguas Buenas -Admin	3 kWdc	≤ 3kWh	≤ 2kWh
3	Corozal	23 kWdc	39 kWh	28 kWh
	<b>TOTALS</b>	<b>75 kWdc</b>	<b>134 kWh</b>	<b>96 kWh</b>

The solar and battery capacities in the table above were reached by running a HOMER model based on the load profiles derived from school site visits. The load profiles focus only on the critical loads at each site and assume these loads are being used for a certain period of time each day, based on interviews of school staff.

\*\*The battery sizes listed are the nominal energy of the battery. This battery size assumes a 90% round-trip efficiency and a 20% minimum state of charge. The usable battery storage required is listed on the table taking into account those assumptions. These battery characteristics are not required, but should serve as guidelines for your battery choice.

See “**Exhibit A – Critical Loads**” for more information. Also note that due to the layout of Aguas Buenas, the system has been divided into 3 smaller isolated systems. Please size batteries to these specifications of better.

## C. Design and Installation Requirements



This section provides guidelines for the design and installation of a PV solar system. It is agreed that the system shall comply with NEC 2017 requirements and that the installer will perform the work following industry standard in a timely manner.

It is understood that worker safety—and the safety of students and staff—is of top priority and that all safety rules shall be enforced by the EPC Contractor, who will be responsible for all work safety. Any violation of the safety rules will result in the immediate expulsion of the faulty worker from the job site. Furthermore, since the project site is a public school, all workers working the presence of children shall comply with and sign the Child Safeguarding policy and provide documentation of a background check as outlined in “**Exhibit F - Child Safeguarding Policy**”.

All components and equipment should be installed per manufacturer's specifications and in accordance with NEC 2017 workspace clearance requirements.

### General

- Systems shall be shall be interconnected to the grid.
- System (including supports and wiring) shall not interfere with any existing roof drains, water drainage, expansion joints, air intakes, electrical and mechanical equipment, or antennas.
- All PV hardware and structural components shall be corrosion-resistant.
- All equipment and racking shall be designed and verified by a Structural Engineer to withstand sustained winds of at least 156 MPH; preferred 175 MPH.
- Project must be compliant with all applicable building, mechanical, fire, seismic, structural and electrical codes and standards; these include but are not limited to relevant NEC 2017, UL, IEC, IEEE, and ASCE technical codes.
- Solar layout shall meet all local fire department, code and ordinance requirements for roof access.
- All equipment should be secured with necessary anti-theft mechanisms to reduce the possibility of theft (include anti-theft screws).
- EPC shall provide confirmation that the PV systems will be designed to comply with applicable PREPA interconnection requirements.
- Systems with remote monitoring capabilities are preferred.
- Microgrid controls should prioritize the energy sources in the following order: PV, Grid, Batteries.

### Roofing

- Use your best judgment based on your assessment of the roof to provide the most cost effective solution that assures a 10 year waterproofing warranty.
- Remove and replace any roofing unable to support PV technology weight and that could pose a danger to school student and staff if that is the only roof deemed appropriate for the installation.
- Repair any problems with the roof that could compromise the project.



- For all roofs included in the project, apply necessary coatings to ensure roof waterproofing for 10+ years.
- For locations installing PV panels on multiple rooftops, all rooftops are subject to the above mentioned specifications.
- EPC contractor may install PV panels on a roof adjacent to the intended use area, so long as the line losses involved do not exceed the maximum, as stated in the “Conductors” requirements.
- In the Comerio school, EPC must install two ceiling fans in the library with an energy consumption less than or equal to what is outlined in Exhibit A in the load profile.

### Racking System

- All racking shall be built using aluminum (preferred), stainless steel, or galvanized steel.
- The racking system shall be securely bolted to the roof and all roof penetrations shall be properly flashed to ensure roof waterproofing remain intact.
- The PV mounting structure and the PV array shall constitute an assembly that can sustain 156 mph wind speeds. Also see Resilience section below.
- EPC Contractor, or subcontractor firm, shall evaluate roof capability of supporting the weight of the array.

### Photovoltaic Modules / Arrays

- All photovoltaic modules shall be guaranteed by the manufacturer to retain an output power of at least 80% of their nominal value over a period of at least 20 years. Positive tolerance on modules output preferable.
- All PV modules shall be equipped with bypass diodes.
- PV modules shall be provided with PV wire leads terminated by MC4 connectors preferably long enough to allow for leapfrog wiring.
- All exposed wire shall be specified as photovoltaic (PV) wire as per UL 4703.
- UL listed electrical conductors rated at 90°C and specified for wet location shall be used in conduits for PV connections when leaving the array.
- Rapid shutdown system shall be installed where required as per NEC 2017.
- Each string shall be protected by an overcurrent protection device rated as per NEC 2017.
- Each string shall be connected to a device allowing for manual disconnect.
- The use of a fused DC disconnect is the preferred method for over current protection and manual disconnect of each string.
- Existing roof should be left in good condition, with no cracks, damage, broken shingles, or excessive visible wear.
- All roof penetrations should be properly flashed where required: Must comply with IBC standards and product manufacturer installation instructions.
- All conductors should be securely managed underneath the array: conductors may not be loose and may not contact roof surface.
- All wire management devices should be UL listed and intended for solar array installations.



- All conductors leaving the array should be in conduits, and bend radius shall be no smaller than 5 times the diameter of the conductor.
- All array conductors shall be properly supported within 12 inches maximum of entering a box and every 4.5 Ft maximum along the way.

### Inverters

- All solar inverters used shall be UL approved with a minimum efficiency of 94% at all power level.
- All battery inverters used shall be UL approved with a minimum efficiency of 90% at all power level.
- Solar inverter outputs shall be protected by a properly-sized circuit breaker.
- Battery inverter AC input and output shall be protected by a properly sized circuit breaker.
- For solar inverters, the PV source open circuit voltage shall be kept below the inverter maximum input voltage. Low temperature Voc adjustment should apply as per PV manufacturer's specification or NEC 2017.

### Batteries

- Battery bank shall be designed to sustain a maximum ambient temperature without major losses.
- DC Voltage drop shall not exceed 0.2 volts per cell above 45°C.
- The designed daily depth of discharge (DOD) and total number of cycles shall be specified by the EPC contractor.
- Batteries shall be installed in a container that is appropriate for its environment (indoor/outdoor) and the enclosure should be electrically isolated so as to ensure safety of school staff and children. Preferably, batteries shall be enclosed in a non-metallic battery box, well ventilated with a properly-installed temperature sensor.
- The battery bank shall be protected by a properly-sized class T fuse.
- Battery bank shall be designed to protect each facility's critical loads.
- Protected loads shall be located on back-up load panels with automatic transfer switch
- **Required battery chemistry: Lithium Ion.**

### Conductors

- A maximum of 3% voltage drop shall be allowed on all AC circuits. A maximum of 2% voltage drop shall be allowed on all DC circuits.
- All underground conductors shall be rated for use in wet locations.
- All conductors shall be copper-stranded, unless otherwise specified.
- All conductors shall be UL-approved and rated at 90°C for wet locations.
- All conductors shall be derated for ambient temperatures and number of conductors per conduit as per NEC 2017.



## Conduits

- Conductor fill factor shall be as per NEC 2017 Chapter 9. For runways greater than 100 feet, the next bigger conduit size shall be used for ease of installation.
- The 4 ninety-degree bend rule applies. Properly sized junction boxes (above ground) and hand holes or manholes (underground) shall be used where needed.
- Raceway depth for underground installations shall be as per NEC 2017.
- Conduits shall be fastened as per NEC 2017.

## Junction / Combiner Boxes

- Combiner boxes shall be rated for the maximum system voltage. Fused combiner boxes are preferred.
- Junction/combiner boxes shall be easily accessible for inspection.
- Junction box fill shall be as per NEC 2017.
- All outdoor boxes shall be rated at least per NEMA 3R.
- Proper rain tight connectors shall be used when installed outdoor.
- Additional approved sealing method shall be used when entering the top of an outdoor box. Myers hub are a good option.
- UL listed surge protectors are mandatory on each combiner box.

## Splicing

- All splicing shall be accessible for visual inspections and shall be of the waterproof type if located underground.

## Grounding

- The PV array equipment and all metallic components must be properly bonded and grounded, unless otherwise specified.
- All grounding of equipment shall be in accordance with NEC 2017.
- Grounding conductors are not allowed to be spliced unless using irreversible compression-type connectors.
- Grounding bushings shall be used to terminate all metallic conduits where required.

## Resilience

To ensure that the proposed system may withstand hurricane-force winds, the EPC Contractor must:

- Specify high-load (up to 5,400 Pa uplift) PV modules, based on structural calculations; these are currently available from a number of Tier-1 module manufacturers.



- Perform structural engineering in accordance with ASCE 7 and site conditions, with calculations for wind forces, reactions, and attachment design.
- Check with racking manufacturer that actual site conditions comply with their base condition assumptions from wind-tunnel testing.
- Specify bolt QA/QC process to avoid inadequate torquing of bolts.
- Specify bolt hardware locking solution.
- Specify through-bolting of modules as opposed to top-down or T clamps, or if top clamping is required, use clamps that hold modules individually or independently.
- Require structural engineer review of lateral loads due to racking and electrical hardware—often lateral loads are missed, and recent failures have proven them to be a critical source of weakness (e.g., combiner boxes attached to end solar array posts caused increased loading and led to failure).
- Specify all hardware be sized based on 25 years (or project life) of corrosion.
- Not use self-tapping screws.

#### Operations and Maintenance Requirements (If proposing an O&M services contract)

At a minimum, the O&M contract should include:

- Regular preventive and corrective maintenance including:
  - Detailed inspection of all equipment.
  - Cleaning of all panels and remove any debris in installation area.
  - Ensure proper functioning of inverter and batteries and perform routine preventive maintenance on battery banks and inverter, per manufacturer's operating guidelines.
  - Submitting warranty request to manufacturers in the case of equipment malfunctioning.
  - Inspect all foundations for cracks and premature failure .
  - Make adjustment to the structure and replacement of required support pieces.
- Remote monitoring:
  - If and when an issue to a system is detected, Company will notify the School and schedule a service visit.
  - Provide customer with access to the online monitoring portal for the system.

## V. Scope of Work and Deliverables

### A. Installation

The EPC Contractor shall procure and safely install all solar equipment for the school sites, including but not limited to PV panels, inverters, conduit, wires, breakers, racking, junction boxes, batteries, microgrid controls, and monitoring equipment. By accepting this request, your company will supply the following scope, included but not limited to the following areas.

The EPC Contractor shall perform and manage the installation and commissioning of the solar



microgrid. including the electrical protection system, selectivity, and grounding system – to match the designed outputs and system characteristics. The installation shall maintain the integrity of building structures and electrical systems, complying with client’s safety and environmental standards, NEC 2017 standards, and proposed timeline described in your proposal.

The EPC Contractor shall perform the needed mobilization for the installation and commissioning of the solar microgrid system, utilizing all solar energy industry good practices, and shall be held accountable for any liability caused by EPC crew members or subcontractors on client’s facility.

EPC shall be responsible for a 1-year Workmanship Warranty.

## B. Documentation

At the end of the project, the EPC Contractor must provide the following documentation to RMI:

- All technical documentation, including Components data sheets and listing
- Warranties
- Installation and operation manuals
- As-built version of system drawings, cable lists and routing, wirings, grounding system, protection system, as well as single line adjustments in electronic media file and hard copy

## C. Employee Policy

Promote equal opportunity treatment for local employees hiring under your company’s contract for and during the project, providing lodging options. Provide all necessary safety equipment to installers onsite, including but not limited to hard hats, fall protection for all work to be performed 6 ft above ground level, bright color working vest and insulating gloves.

A preference is given to EPCs that hire Puerto Rican crew members. See “**Exhibit C - EPC Qualification Form**”.

## D. Equipment Availability

Please specify where you will acquire the solar energy system equipment and specify the availability of the equipment in your warehouse or with your distributor. If you will need to order any equipment from overseas, please specify delivery time and include shipping cost in your Bill of Materials

## E. Net Energy Metering

- EPC Contractor shall coordinate with PREPA to ensure that the project satisfies all criteria for



interconnection of the project to the PREPA electric distribution system. This includes coordinating all negotiations, meetings, design reviews, and conducting interactions with PREPA necessary to completing system interconnection.

- EPC Contractor is responsible for preparing required submissions for obtaining the Net Energy Metering (NEM) and interconnection agreement from the utility. The Department of Education will sign the NEM and interconnection agreements, not the contractor.
- EPC Contractor shall manage interconnection and startup of project in coordination with PREPA. EPC Contractor shall, at its own expense, pay any interconnection, processing, and other fees and expenses as may be required by PREPA for interconnection and operation of the project.

## F. Additional EPC Responsibilities

- EPC shall be responsible for all required permitting with local agencies.
- EPC shall provide as-built drawings and operations manual at project completion.

## VI. Selection Criteria

The proposal will be evaluated on the following criteria:

<b>Price</b>	50%
<b>Proposed Equipment, Design, and Quality Plan</b>	30%
<b>Project Timeline</b>	10%
<b>Relevant Experience, Track Record</b>	10%

Please See “**Exhibit B – Selection Criteria**” for a more detailed table.

## VII. Proposal Requirements

The submitted proposal shall include all of the following:

1. Company & Team Summary, including copies of business registration and professional Electrician and PV installer licenses
2. EPC Qualification Form (**Exhibit C**)
  - If awarded the project, all onsite personnel will be required to complete a background check, inclusive of the installation crew and any subcontractors, as outlined in “Exhibit F - Child Safeguarding Policy”.
3. Roofing company details and roofing plan
4. Scope of Work for this project, including any exclusions/exceptions
5. Equipment and Pricing List (**Exhibit D**)



- The quote contained within the proposal shall follow the format contained within Exhibit D and should include all items not marked as optional.
  - The 1-year workmanship warranty shall be included in the Labor Cost.
  - The proposal may optionally include a quote for a 10-year O&M Services Contract. This contract should be quoted as a prepaid, lump sum contract payable upon system commissioning.
6. Proposed System Design
- Please include layouts, a single line diagram of the entire system, and system details such as estimated annual energy production in kWh/year.
  - Production estimates shall account for shade effects at each array location.
  - The single line diagram shall include all conductor and conduit sizes.
7. Project Timeline (**Exhibit E**)
8. Staging Plan
- In the Staging Plan, please indicate how you plan to store materials at the site during construction and how you plan to have construction vehicles enter and exit the site. Please also indicate if there is anything you need the client to provide while onsite, such as access to electricity, water, restrooms, etc. or whether you will be providing these necessities. Access to the site will be strictly limited to working personnel.
9. Quality Control and Risk Mitigation Plan

## VIII. Important Notes

RMI is a nonprofit that may receive pledged donations from equipment manufacturers and distributors including but not limited to PV modules, racking, inverters, and batteries, other equipment necessary for the project, and donated labor given that they meet the above stated specifications. A preference will be made to any bidder that is able to integrate donated equipment into the project.

The Solar Schools Initiative is planning five (5) additional projects in the near future. Following RFPs will likely be issued in groups of multiple projects similar to this one. Please note your interest/preferences and capacity for bidding on future similar projects.

## IX. Submission Instructions and Deadline

To be considered for this bidding process, please present your Proposal following the proposal requirements described in this RFP by 11:59 pm Atlantic Time on **Wednesday, December 5, 2018**.

All contractors may submit their questions regarding the RFP to [amifsud@rmi.org](mailto:amifsud@rmi.org) and [mkerins@rmi.org](mailto:mkerins@rmi.org). All RFP questions shall be to be submitted by **Wednesday, November 28, 2018**.

All proposals must be submitted via email to both Ana Sophia Mifsud ( [amifsud@rmi.org](mailto:amifsud@rmi.org) ) and Megan Kerins ( [mkerins@rmi.org](mailto:mkerins@rmi.org) ) by **Wednesday, December 5th, 2018**. No physical copy is required.



## X. Execution of EPC Agreement

The scope of this RFP includes the turnkey EPC services for the implementation of the Project and will be executed through an EPC Agreement. RMI will execute an EPC Agreement with the successful Bidder for a negotiated dollar amount (USD). The winning Bidder will be considered the EPC Contractor, and RMI will be the purchaser, owner, and operator of the constructed system.



# Exhibit A: Critical Loads

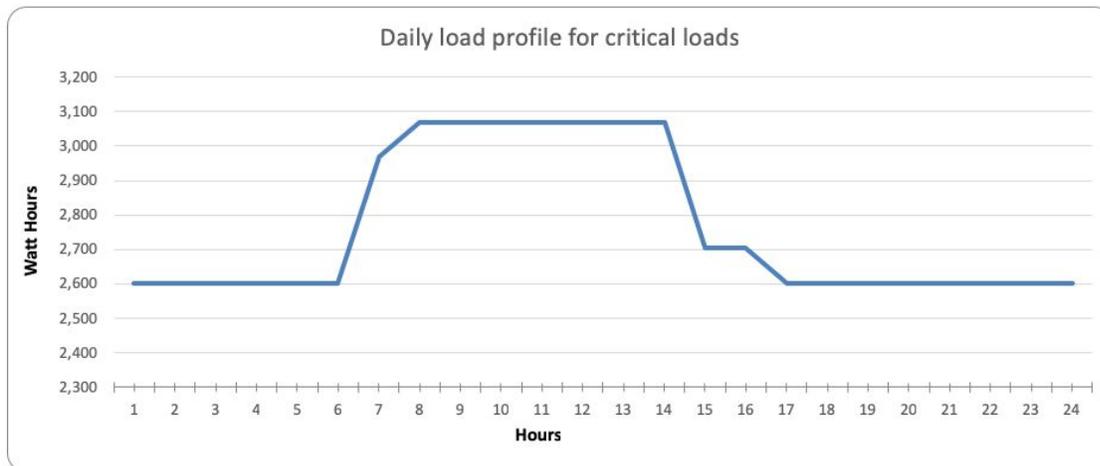
The following load data is the estimated consumption and load profile of the equipment to be powered in each school with the installed microgrid. These loads should be able to operate under normal electrical grid conditions and during grid outages.

The following table outlines all equipment considered to be critical loads and should be included on the critical loads circuit to be powered by the microgrid. The load profile should give an indication of the performance requirements of the system and should be considered when designing the system. As you will see, the loads for Aguas Buenas are broken down into three sections: kitchen, library, and admin office. Due to constraints at the site, each of these systems should run independently of one another.

For locations installing PV panels on multiple rooftops, all rooftops must be subject to repairs according to the specifications within the RFP.

## Critical Loads Aguas Buenas - Kitchen

	Power [W]	Units	Start use	End use	Hours	Total W	Total Wh
<b>Kitchen</b>							
Refrigerator large	551	3	0	24	24	1,653	39,672
Refrigerator small	331		0	24	24	-	-
Freezer large	663	1	0	24	24	663	15,900
Freezer small	398		0	24	24	-	-
Cooler large	288	1	0	24	24	288	6,900
Cooler small	173		0	24	24	-	-
Lighting LED	12	30	6	14	8	360	2,880
Lighting fluorescent	40		6	14	8	-	-
Oven fan	5	1	6	14	8	5	40
Generic charging outlet	100	1	7	16	9	100	900
<b>TOTALS</b>						<b>3,068</b>	<b>66,292</b>

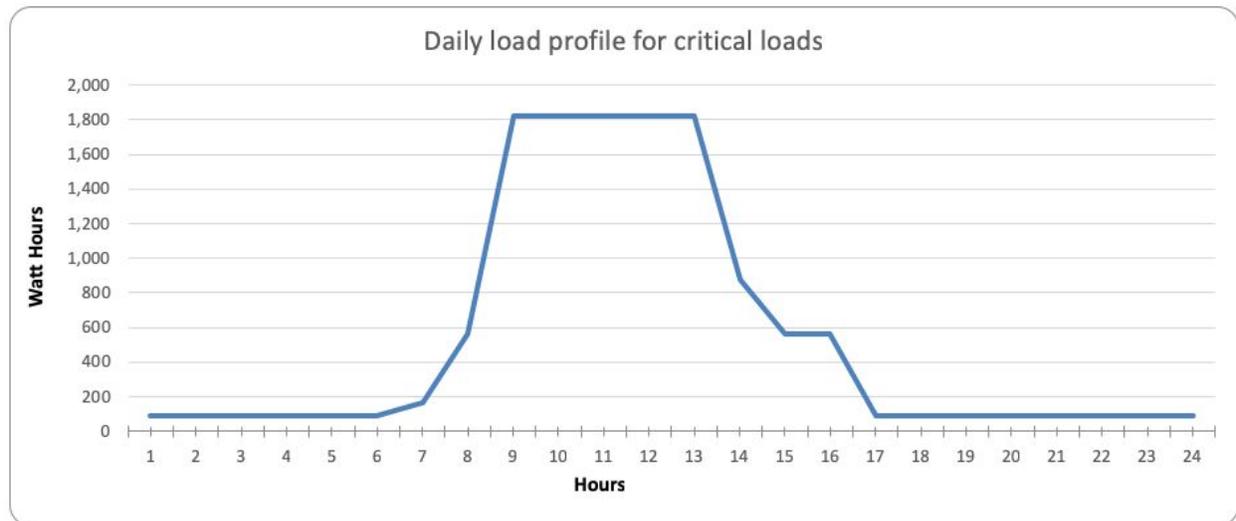




# Exhibit A: Critical Loads

## Critical Loads Aguas Buenas - Library

	Power [W]	Units	Start use	End use	Hours	Total W	Total Wh
<b>Library / Computer room</b>							
Desktop computers	100	2	8	13	5	200	1,000
Laptop computers	50	15	8	13	5	750	3,750
Lighting LED	12	6	6	16	10	72	720
Lighting fluorescent	40		6	16	10	-	-
Projectors	300		10	16	6	-	-
Servers	3000	0	0	24	24	-	-
Small printers	50	1	8	14	1.5	13	75
Large printers - idling	20	1	0	24	23	20	480
Large printers - printing	1200	1	8	14	1.5	300	1,800
Wifi router	35	2	0	24	24	70	1,680
Generic charging outlet	100	4	7	16	9	400	3,600
<b>TOTALS</b>						<b>1,825</b>	<b>13,105</b>

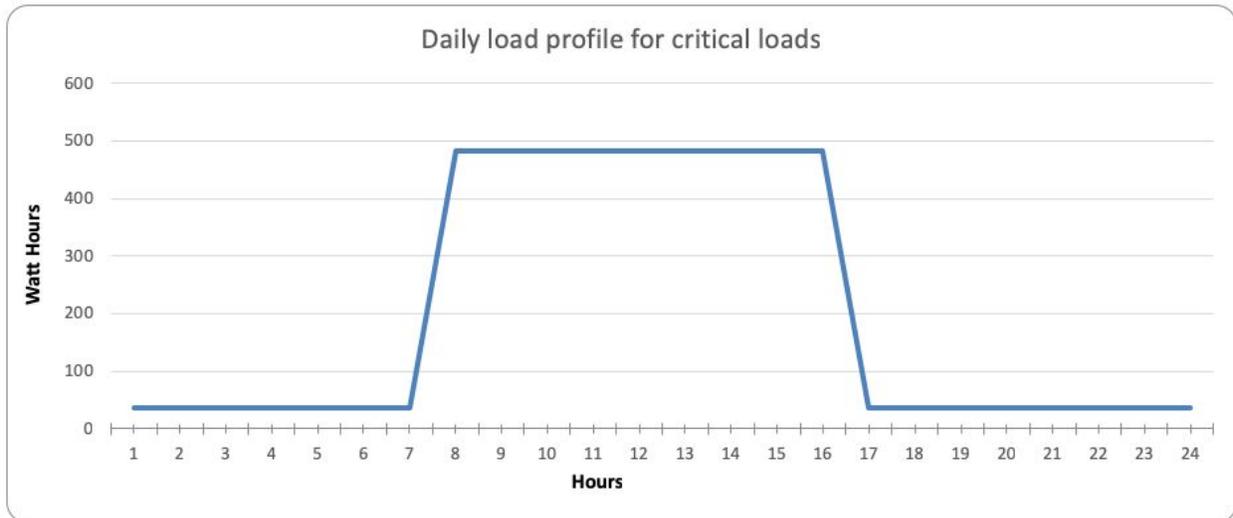




# Exhibit A: Critical Loads

## Critical Loads Aguas Buenas - Admin Office

	Power [W]	Units	Start use	End use	Hours	Total W	Total Wh
<b>Admin office</b>					-		
Desktop computers	100	1	7	16	9	100	900
Laptop computers	50	2	7	16	9	100	900
Wifi router	35	1	0	24	24	35	840
Lighting LED	12	4	7	16	9	48	432
Lighting fluorescent	40		7	16	9	-	-
AC	150				-	-	-
Generic charging outlet	100	2	7	16	9	200	1,800
<b>TOTALS</b>						<b>483</b>	<b>4,872</b>

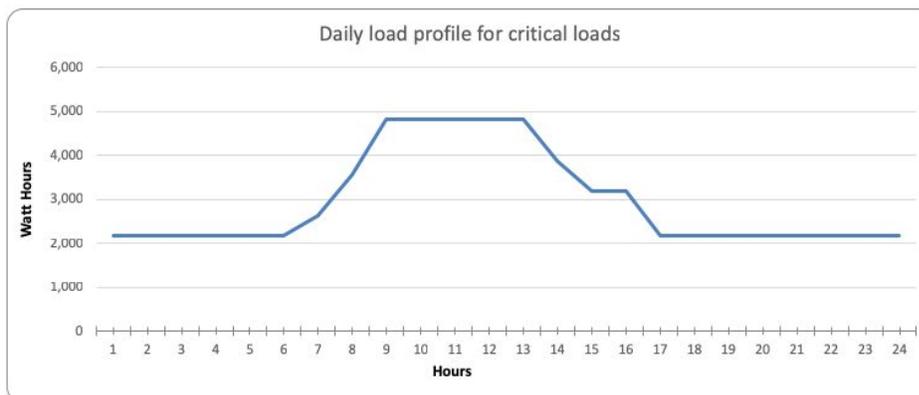




# Exhibit A: Critical Loads

## Critical Loads Comerio

	Power [W]	Units	Start use	End use	Hours	Total W	Total Wh
<b>Kitchen</b>							
Refrigerator large	551	2	0	24	24	1,102	26,448
Refrigerator small	331		0	24	24	-	-
Freezer large	663	1	0	24	24	663	15,900
Freezer small	398		0	24	24	-	-
Cooler large	288	1	0	24	24	288	6,900
Cooler small	173		0	24	24	-	-
Lighting LED	12	30	6	14	8	360	2,880
Lighting fluorescent	40		6	14	8	-	-
Oven fan	5	1	6	14	8	5	40
Generic charging outlet	100	1	7	16	9	100	900
<b>Library / Computer room</b>							
Desktop computers	100	2	8	13	5	200	1,000
Laptop computers	50	15	8	13	5	750	3,750
Lighting LED	12	6	6	16	10	72	720
Lighting fluorescent	40		6	16	10	-	-
Projectors	300		10	16	6	-	-
Fan	50	2	8	16	8	100	800
Small printers	50	1	8	14	1.5	13	75
Large printers - idling	20	1	0	24	23	20	480
Large printers - printing	1200	1	8	14	1.5	300	1,800
Wifi router	35	2	0	24	24	70	1,680
Generic charging outlet	100	4	7	16	9	400	3,600
<b>Admin office</b>							
Desktop computers	100	1	7	16	9	100	900
Laptop computers	50	2	7	16	9	100	900
Wifi router	35	1	0	24	24	35	840
Lighting LED	12	4	7	16	9	48	432
Lighting fluorescent	40		7	16	9	-	-
AC	150					-	-
Generic charging outlet	100	2	7	16	9	200	1,800
<b>TOTALS</b>						<b>4,925</b>	<b>71,845</b>

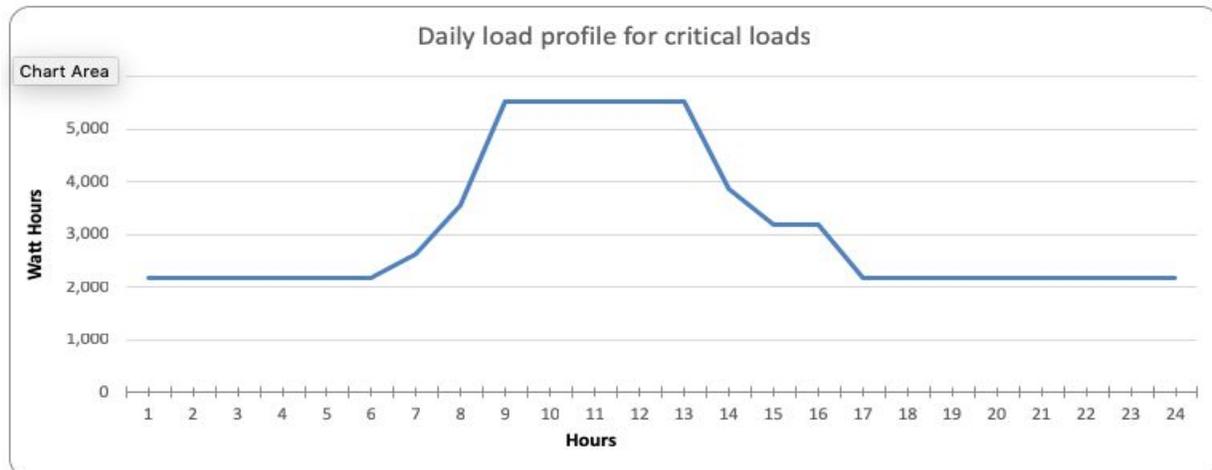




# Exhibit A: Critical Loads

## Critical Loads Corozal

	Power [W]	Units	Start use	End use	Hours	Total W	Total Wh
<b>Kitchen</b>							
Refrigerator large	551	2	0	24	24	1,102	26,448
Refrigerator small	331		0	24	24	-	-
Freezer large	663	1	0	24	24	663	15,900
Freezer small	398		0	24	24	-	-
Cooler large	288	1	0	24	24	288	6,900
Cooler small	173		0	24	24	-	-
Lighting LED	12	30	6	14	8	360	2,880
Lighting fluorescent	40		6	14	8	-	-
Oven fan	5	1	6	14	8	5	40
Generic charging outlet	100	1	7	16	9	100	900
<b>Library / Computer room</b>							
Desktop computers	100	9	8	13	5	900	4,500
Laptop computers	50	15	8	13	5	750	3,750
Lighting LED	12	6	6	16	10	72	720
Lighting fluorescent	40		6	16	10	-	-
Projectors	300		10	16	6	-	-
AC	150				-	-	-
Small printers	50	1	8	14	1.5	13	75
Large printers - idling	20	1	0	24	23	20	480
Large printers - printing	1200	1	8	14	1.5	300	1,800
Wifi router	35	2	0	24	24	70	1,680
Generic charging outlet	100	4	7	16	9	400	3,600
<b>Admin office</b>							
Desktop computers	100	1	7	16	9	100	900
Laptop computers	50	2	7	16	9	100	900
Wifi router	35	1	0	24	24	35	840
Lighting LED	12	4	7	16	9	48	432
Lighting fluorescent	40		7	16	9	-	-
AC	150				-	-	-
Generic charging outlet	100	2	7	16	9	200	1,800
<b>TOTALS</b>						<b>5,525</b>	<b>74,545</b>





# Exhibit B: Selection Criteria

<b>SECTION 1: REQUIREMENTS</b>	<b>Score</b>
1.1 Bid Submitted on Time?	Required
1.2 Bid Complete - ALL required items have been submitted?	Required
1.3 Conformance with all requirements included in RFP specifications providing maximum value and lowest scheduling, performance, and cost risk?	Required
1.4 Project costs are appropriate given proposed system size and bidder provides information with transparent methodology?	Required
<b>TOTAL SECTION 1</b>	<b>N/A</b>
<b>SECTION 2: PRICE</b>	<b>Score</b>
2.1 Total Project Cost, including roofing and resilience measures.	0 - 25
2.2 Project Cost in \$/W	0 - 25
2.3 (Optional) 10-year O&M Services Cost	Least Cost
<b>TOTAL SECTION 2</b>	<b>50</b>
<b>SECTION 3: EQUIPMENT, DESIGN, AND QUALITY PLAN</b>	<b>Score</b>
3.1 Completeness and quality of technical documentation for proposed systems including complete equipment list and description of NEC compliance. Preliminary system design is appropriate for site needs and conditions.	0-10
3.2 Module supply, availability, quality and warranties meet or exceed RFP requirements and supplier has proven track record.	0-4
3.3 Inverter supply, availability, quality and warranties meet or exceed RFP requirements.	0-4
3.4 Monitoring system and microgrid controls meet or exceed RFP requirements.	0-4
3.5 Included complete and adequate description of EPC's approach to roofing, electrical upgrade, resilience, anti-theft equipment, and energy efficiency.	0-8
<b>TOTAL SECTION 3</b>	<b>30</b>
<b>SECTION 4: PROJECT TIMELINE</b>	<b>Score</b>
4.1 Project plan and schedule account for RFP submittal requirements, complexity of project and demonstrates methodology for management of multiple sites. Project phases and activities are appropriately sequenced.	0-5
4.2 Description of plan for accommodating school schedules.	0-5
<b>TOTAL SECTION 4</b>	<b>10</b>
<b>SECTION 5: EPC QUALIFICATIONS</b>	<b>Score</b>
5.1 EPC's staffing plan includes upper-level construction manager with significant project experience	0 - 3
5.2 EPC plans to staff the project with Puerto Rican installation crew members	0 - 3
5.3 EPC has completed at least 3 solar + storage projects previously	0 - 2
5.4 EPC has expertise in the National Electric Code	0 - 2
<b>TOTAL SECTION 5</b>	<b>10</b>
<b>TOTAL SCORE</b>	<b>100</b>



# Exhibit C: EPC Qualification Form

## Company Profile

Please provide the following company information so that we may contact you.

EPC Company Name	
Main Contact Full Name	
Contact Phone	
Contact Email	
Company Website	
Company Address	
Years Operating in Puerto Rico	

## Project History

Please tell us about your most recent projects. You may also include current projects.

Year Commissioned	Project Technology (solar, wind, solar + battery etc.)	Project Size (kW of generation and/or kwh of storage)

## Expertise

Please specify number of years of experience your company in the following areas.

Solar PV	
Battery Storage	
Microgrid Controls	
General Contracting	
Structural Engineering	



# Exhibit C: EPC Qualification Form

Operations and Maintenance

## **Accreditations**

Which of the following certifications does the EPC Company possess and in which year it was accredited?

Name of Accreditation	Yes / No / In Progress	Year Obtained
National Electric Code (NEC) Certification		
NABCEP Certification		
ISO 9001 Certification		
Other Technical Certification		

## **Additional Questions**

### **Training**

Has the EPC Company participated in a technical training with a solar energy training entity? If yes, which institution, which topic, and how many employees were trained?

### **Local Hiring Policy**

Does the EPC Company hire Puerto Rican employees?

### **Sub Vendors**

With which Puerto Rican vendors, contractors, or distribution companies does the EPC Company partner?



# Exhibit D: Equipment and Pricing List

## Total Project Pricing Table

Please provide **TOTAL** itemized pricing for all three schools combined:

**\*\*Note: if you are using any donated equipment or services, please note them in the total cost section with an asterisk and describe the amount donated at the end of this exhibit.\*\***

Item	Make and Model	Quantity	Total Cost
Building Electrical Retrofit	--	--	
Roofing Quote	--	--	
Solar Panels			
Solar Inverters			
Racking			
Batteries			
Battery Inverters (if different from PV inverter)			
Monitoring System			
Microgrid Controls			
Auxiliary Materials (wiring, breakers, conduit, etc.)			
Anti-Theft Equipment			
Design and Engineering			
Permitting and Interconnection	--	--	
Contingency	--	--	
Labor	--		
Other Costs, including energy efficiency measures			
<b>TOTAL</b>			

**Optionally, you may provide quotes for the following items.**

Item			Total Cost
10-year O&M Services (Optional)	--	--	

**If you entered additional costs in the “Other Costs” row, please specify them:**

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# Exhibit D: Equipment and Pricing List

## Comerio Equipment and Pricing Table

Please provide itemized pricing for the following, including taxes and shipping costs.

Item	Make and Model	Quantity	Total Cost
Building Electrical Retrofit	--	--	
Roofing Quote	--	--	
Solar Panels			
Solar Inverters			
Racking			
Batteries			
Battery Inverters (if different from PV inverter)			
Monitoring System			
Microgrid Controls			
Auxiliary Materials (wiring, breakers, conduit, etc.)			
Anti-Theft Equipment			
Design and Engineering			
Permitting and Interconnection	--	--	
Contingency	--	--	
Labor	--		
Other Costs, including energy efficiency measures			
<b>TOTAL</b>			

Optionally, you may provide quotes for the following items.

Item			Total Cost
10-year O&M Services (Optional)	--	--	

If you entered additional costs in the "Other Costs" row, please specify them:

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# Exhibit D: Equipment and Pricing List

## Aguas Buenas Equipment and Pricing Table

Please provide itemized pricing for the following, including taxes and shipping costs.

Item	Make and Model	Quantity	Total Cost
Building Electrical Retrofit	--	--	
Roofing Quote	--	--	
Solar Panels			
Solar Inverters			
Racking			
Batteries			
Battery Inverters (if different from PV inverter)			
Monitoring System			
Microgrid Controls			
Auxiliary Materials (wiring, breakers, conduit, etc.)			
Anti-Theft Equipment			
Design and Engineering			
Permitting and Interconnection	--	--	
Contingency	--	--	
Labor	--		
Other Costs, including energy efficiency measures			
<b>TOTAL</b>			

Optionally, you may provide quotes for the following items.

Item			Total Cost
10-year O&M Services (Optional)	--	--	

If you entered additional costs in the "Other Costs" row, please specify them:

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# Exhibit D: Equipment and Pricing List

## Corozal Equipment and Pricing Table

Please provide itemized pricing for the following, including taxes and shipping costs.

Item	Make and Model	Quantity + Units	Total Cost
Building Electrical Retrofit	--	--	
Roofing Quote	--	--	
Solar Panels			
Solar Inverters			
Racking			
Batteries			
Battery Inverters (if different from PV inverter)			
Monitoring System			
Microgrid Controls			
Auxiliary Materials (wiring, breakers, conduit, etc.)			
Design and Engineering			
Permitting	--	--	
Contingency	--	--	
Labor	--		
Other Costs, including energy efficiency measures			
<b>TOTAL</b>			

Optionally, you may provide quotes for the following items.

Item			Total Cost
10-year O&M Services (Optional)	--	--	

If you entered additional costs in the "Other Costs" row, please specify them:

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# Exhibit D: Equipment and Pricing List

## Donated Equipment

Please list the donated equipment or labor you will be using in this project using the following table:

Item	Make and Model	Quantity + Units	Estimated Value of Donation	Source of Donation

For each item please describe how secure the donation is for this project:

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# Exhibit F: Child Safeguarding Policy

## Child Safeguarding Policy

Because these projects will be done in a public school, there are requirements that must be met in order to ensure the safety of the staff and children within the school.

The selected bidder must have all their employees and subcontractors that will work in a place where children are present:

1. Pass a background check and provide documentation that they have passed the background check
2. Read and sign the Child Safeguarding Policy (included below)

## Background Check

All workers that work in the presence of children must pass and provide documentation that they have no criminal records and are not sex offenders.

If your workers do not already have records of their background checks, we recommend using the following website: <https://www.sterlingtalentsolutions.com/> which is able to provide fast background checks.

## Child Safeguarding Policy

The following policy must be read and signed by all workers that will be working in the presence of children.



**Save the Children®**

## **Child Safeguarding Short Form Policy**

**This short form is to be used for non-staff representatives that meet one or more of the following criteria:**

- **Are visiting a site(s) or home based visits**
- **A volunteer with one or more of our programs**
- **Represents Save the Children's name at an event**
- **Is contracted with one of our sites and has a governing Child Safeguarding policy with their own organization.**

**Save the Children is committed to making Save the Children safe for children.**

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## DEFINITIONS

- A. Child or Children:** Anyone under 18 years of age.
- B. Child Abuse:** Anything which individuals, institutions or processes do or fail to do which directly or indirectly harms children or damages their prospect of safe and healthy development into adulthood. The main categories of child abuse are: physical abuse, emotional abuse, neglect/negligent treatment; and sexual abuse including exploitation.
- C. Representatives of Save the Children:** Employees, volunteers, interns, consultants, Board members, partners and others who work with children on Save the Children's behalf, visit Save the Children's programs, or who have access to sensitive information about children in Save the Children's programs.

Please find below the key elements of Save the Children's Child Safeguarding Policy. The full policy is available upon request.

## POLICIES

- 1. Save the Children is Committed to Children**
  - Save the Children is committed to conducting its programs and operations in a manner that is safe for the children it serves and helping protect the children with whom Save the Children is in contact.
  - Representatives are explicitly prohibited from engaging in any activity that may result in any kind of Child Abuse.
  - Representatives are expected to create and proactively maintain an environment that aims to prevent and deter any actions and omissions, whether deliberate or inadvertent, that place children at risk of any kind of Child Abuse.
  - Any violations of this policy will be treated as a serious issue and will result in disciplinary action being taken, including termination and any other available legal remedy.
  - In furtherance of this Policy, Save the Children has adopted Procedures, described below, to promote prevention, reporting, responding and training.
- 2. Save the Children Complies with all Applicable Laws and Regulations**
  - It is Save the Children's Policy to ensure compliance with host country and local child welfare and protection legislation, or international standards, whichever affords greater protection, and with U.S. law.
- 3. Save the Children Prohibits Sexual Activity with Children**
  - Any individual under the age of 18 is a child and is "underage", regardless of the legal age of consent of the country in which s/he lives and/or in which the offense occurs.

- An underage child cannot legally give informed consent to sexual activity.
- 4. Save the Children's Management is Committed**
    - Management is committed to taking all appropriate corrective actions, including disciplinary, legal, or other actions in response to any violation of the Child Safeguarding Policy.
  - 5. Policy on Confidentiality in Child Safeguarding Matters**
    - SCUS has a duty to manage sensitive information in a manner that is respectful, professional and that complies with the applicable law.
    - Representatives must keep all information about any suspected or reported incidents strictly confidential, except that Representatives must divulge only that information as set forth in the *We Report Child Safeguarding Incidents* section below and in the manner as set forth in that section.

## PROCEDURES

### We Prevent Child Safeguarding Incidents

1. Where possible and practical, the 'two-adult' rule, for which two or more adults supervise all activities where children are involved and are present at all times, should be followed.
2. Representatives must never:
  - hit or otherwise physically assault or physically abuse Children;
  - engage in sexual activity or have a sexual relationship with anyone under the age of 18 years regardless of the age of majority/consent or custom locally (mistaken belief in the age of a child is not a defense);
  - develop relationships with Children which could in any way be deemed exploitative or abusive;
  - act in ways that may be abusive in any way or may place Children at risk of abuse;
  - use language, make suggestions or offer advice to Children which is inappropriate, offensive or abusive;
  - behave in a manner which is physically inappropriate or sexually provocative;
  - stay alone overnight with one or more Children benefitting from Save the Children programs who are not part of their family, whether in their house, project premises or elsewhere;
  - have a Child beneficiary stay overnight at their home;
  - sleep in the same bed or same room as a Child beneficiary;
  - do things for Child beneficiaries of a personal nature that they can do themselves;
  - condone, or participate in, behavior of Children which is unsafe or illegal;

- act in ways intended to shame, humiliate, belittle or degrade Children, or otherwise perpetrate any form of emotional abuse;
- discriminate against, show unfair differential treatment or favor to particular Child beneficiaries to the exclusion of others;
- spend excessive time alone with Child beneficiaries away from others in a manner which could be interpreted as inappropriate;
- expose Child beneficiaries to inappropriate images, films and websites including pornography and extreme violence;
- place themselves in a position where they are made vulnerable to allegations of misconduct.

### **This is not an exhaustive or exclusive list!**

Representatives should at all times avoid actions that may allow behavior to be misrepresented or constitute poor practice or potentially abusive behavior.

### **We Report Child Safeguarding Incidents**

- If a child is in danger or in harm's way, call 911 or the local authorities immediately.
- "Mandatory Reporters" (those who work directly with children) must report concerns to the appropriate local authority (each state has its own reporting hotline).
- U.S. Programs employees, all Head Start employees and all other Representatives that have direct contact with Children:
- Submit an Incident report by email to [incidentreporting@savechildren.org](mailto:incidentreporting@savechildren.org) within 24 hours and include:
  - Date, time and location of the incident
  - Type of incident
  - Relevant actions that are happening at the time of the report
  - Any immediate help or actions requested of Save the Children
  - All other Representatives
- Report the matter anonymously to the National Child Safeguarding Focal Point on-line at [SaveTheChildren.EthicsPoint.com](http://SaveTheChildren.EthicsPoint.com) or anonymously via phone **844-287-1892** (in the US).
- **All reports must be made within 24 hours!**

### **We Respond to Child Safeguarding Incidents**

- Child Safeguarding Focal Points coordinate with the National Child Safeguarding Focal Point, and others as appropriate, when conducting any child safeguarding investigation.
- SCUS takes every allegation of a violation of our Child Safeguarding Policy seriously. The National Child Safeguarding Focal Point is responsible to ensure all credible allegations are logged and tracked in the SCUS central database.
- The National Child Safeguarding Focal Point is tasked with following up with the other involved SCUS

personnel to ensure all allegations are properly investigated and all appropriate corrective action and remedial measures are taken.

### **We Train and Promote Awareness of Child Safeguarding Obligations**

- SCUS provides training on the Child Safeguarding Policy and will require appropriate training for certain Representatives.

### **AGREEMENTS WITH PARTNERS**

- Sub-awardees, partners, vendors, suppliers, consultants and others with whom we provide assets in exchange for services or products (collectively, "Partners")
- All agreements with Partners must include the requirements of the Policy and must include a provision in which the Partner agrees to comply with this Policy (subject to the Exception Approval Procedure contained in the Policy).
- Partners that receive USAID, Office of Head Start or other relevant agency funding additionally must comply with the relevant agency's child safeguarding requirements.

### **GUESTS ON PROJECT VISITS**

- All Representatives of Save the Children on project visits involving children are subject to the Program Visit Child Protection Guidelines included in the Child Safeguarding Policy – see ANNEX I
- As a condition to their visit, all Representatives visiting projects involving Children in Save the Children programs are required to undergo a thorough background check and sign the Child Safeguarding Policy Acknowledgement attached as ANNEX II prior to the visit.
- Once at the project, there should be a verbal presentation made to the guests regarding appropriate conduct.
- Photos taken by guests at project visits of children served by Save the Children and any other information or materials relating to such children may not be distributed on social media or otherwise or posted publically in any manner without the prior approval of Save the Children. (See COMMUNICATIONS GUIDELINES in full policy)

## ANNEX I PROGRAM VISIT CHILD PROTECTION GUIDELINES

### Standards & Procedures for Child Safeguarding and Site Visits:

**1.1 Uphold the agency Child Safeguarding Policy standards through background checks, policy review, signed policy acknowledgements, briefings, and general application to all Save the Children site visitors.** Examples of visitors include staff, interns, consultants, volunteers, vendors, policymakers, talent, corporate or foundation partners, board members, etc...

#### **Procedure (Before Site Visit):**

- Prior to any contact with children, the Save the Children organizer of the site visit will provide expectations for site visits to visitor(s).
- The organizer of the site visit will provide a copy of Save the Children's child safeguarding policy to site visitor(s) prior to visit. Save the Children visitor(s) must review the policy and return a signed child safeguarding policy acknowledgement to the organizer of the site visit.
- Retain signed copies of child safeguarding policy acknowledgements per standard SC policies and practice.
- If a visitor participates in multiple visits annually, he/she only needs to sign a policy acknowledgement once each year.
- In some cases, staff at sites will have additional Child Safeguarding or Ethics Conduct forms for visitor(s) to review and sign.

**1.2 Adhere to the two-adult rule, as outlined in the Child Safeguarding Policy.**

#### **Procedure (During Site Visit):**

- Children must never be left alone with visitor(s). Save the Children staff must adhere to the two-adult rule: two or more adults are required to supervise all activities where children are involved and are present at all times.

**1.3 Protect the privacy and sensitive personal information of children and families.**

#### **Procedure (Before Site Visit):**

- Site staff must explain the content release form to all participants of the upcoming site visit, including all caretakers, guardians, parents of children at the site.
- If an adult or guardian/caretaker of a child has not signed the form prior to the visit, they cannot be included in photographs, video, quotes or other materials intended for publication, marketing or other use that are gathered during the visit. Copies of the release forms should be filed at the site as per standard SC policies and practices.

#### **Procedure (During Site Visit):**

- Do not share children's full names or locations on social media.
- Turn off location devices that automatically populate the location on social media. Please follow Save the Children's

safeguarding guidelines for social media and communications.

#### **Procedure (After Site Visit):**

- Do not share children's full names or locations on social media. Please follow SC's child safeguarding guidelines for social media and communications.

**1.4 Ensure all site visits are authorized, all site visitors have completed and passed a thorough background check, and visit procedures are followed.**

#### **Procedure (Before Site Visit):**

- All site visitors must go a thorough background check in advance of the visit. The organizer of the visit must send the Save the Children representative a background authorization form in advance of the visit. The Save the Children visitor must complete, sign and return the form to the visit organizer. The Authorization to Obtain Background Reports form must be signed by hand in pen (electronic signatures are not acceptable). Save the Children does not require an original copy of the form: faxes, scans, and photocopies are fine.
  - The background check is good for a year's time.
  - The background check must be completed and cleared before the visit.
  - The program office for the site must secure parental/guardian permission for the site visit via a signed consent form.

#### **Procedure (During Site Visit):**

- If a visitor arrives at a program office or site unexpectedly requesting a site visit, staff should explain that a visit cannot take place because the proper forms and background checks have not been completed and notify the appropriate Focal Point of the request. Under no circumstances should a Save the Children guest visit a child, program or community unannounced.
- Visitors must not stay overnight with one or more children benefiting from Save the Children programs who are not part of their immediate or extended family, whether in their house, project premises or elsewhere.
- Sponsors/children may not visit children's/families' or sponsors' homes, respectively. Sponsor visits should take place in a communal, public location (e.g., not at the child's home).
- Sponsor site visits may not exceed two days.
- In the case of a violation pertaining to sponsor visits, the sponsorship relationship will be terminated if deemed necessary (after reviewed for severity of breach).

## ANNEX II

### CHILD SAFEGUARDING ACKNOWLEDGEMENT

I acknowledge that I have been provided with and have reviewed Save the Children USA’s Policy on Child Safeguarding with the effective date of July 25, 2016 (the “Policy”). **I agree to comply with all aspects of the Policy, and I understand that my ongoing compliance with the Policy is a condition required for my participation in any visits to Save the Children program sites or any other Save the Children related activities.**

This Child Safeguarding Acknowledgement shall have effect for a period of one (1) year from the date on which it has been signed as indicated below.

Please complete the following:

Signature: \_\_\_\_\_

Print Name CLEARLY: \_\_\_\_\_

Date Signed: \_\_\_\_\_

Site Visited: \_\_\_\_\_

Partner type:  Volunteer  Consultant  Site Visitor

Other (Please define) \_\_\_\_\_

**TO FILE:** scan and send all signed forms to [CSLibrary@savechildren.org](mailto:CSLibrary@savechildren.org)