



**Illinois Solar for All**

# Approved Vendor Manual 3.0

June 23, 2020

Review of Updates to the Approved Vendor Manual

# Agenda

- Introduction and Program Overview
- Approved Vendor Manual Section Review
- Questions



# Introduction and Program Overview



# Approved Vendor Manual 3.0

- **Revised Long Term Renewable Resources Procurement Plan**
  - Draft Plan released for public comment in August 2019
  - Revised Plan filed with the ICC in October 2019
  - Final Revised Plan published April 20, 2020
- **Clarifications based on Approved Vendor (AV) questions and PY1 and PY2 Project Review**
- **Project selection process updated based on changes in the Revised Plan and public comments**
  - MWBE points for subcontractors
  - Revised points for project size and anchor type categories for Low-Income Community Solar (LICS) projects
  - Project selection processes for both 1-4 unit and 5+ unit buildings in Low-Income Distributed Generation (LIDG) sub-program



# 2020-2021 Program Year (PY3): 2 Submission Windows

## Low-Income Distributed Generation and Non-Profit/Public Facilities sub-programs:

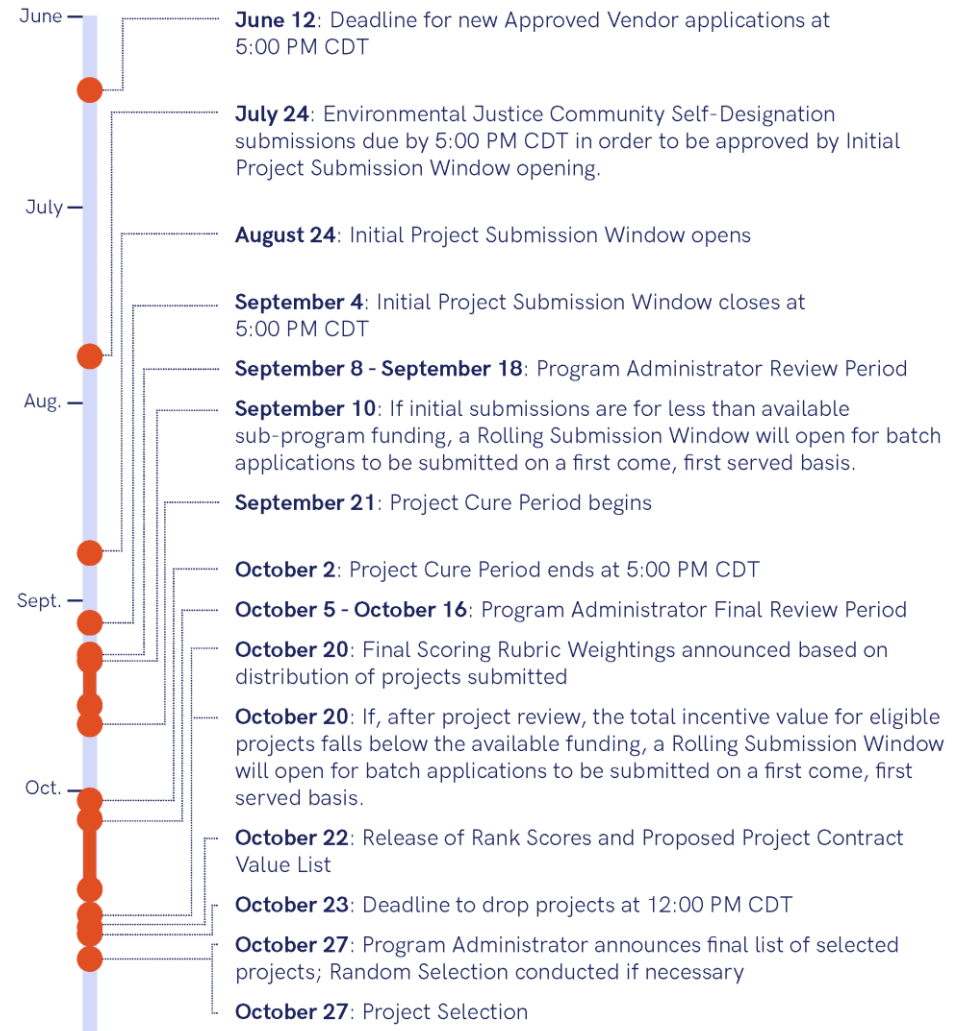
- **July 6 to July 17**  
Initial project submission window is open
- **September 1**  
Rolling submission window opens
- **September 9**  
Project selection



# 2020-2021 Program Year (PY3): 2 Submission Windows

## Low-Income Community Solar sub-program:

- **August 24 to September 4**  
Initial project submission window is open
- **September 10**  
Rolling submission window opens
- **October 27**  
Project selection



# Sections 1-3: Introduction, Sub-Programs Overview, AV Requirements, and Registration



## Section 2: Sub-Program Overview

- Expected 2020-2021 Program Year Budgets, not including any prior program year funds not allocated to projects that roll over to the 2020-2021 program year, nor set asides for administrative expenses and grassroots education funding.

Sub-Program	Expected Budget
LIDG	\$8.367 million
NP/PF	\$5.578 million
LICS	\$13.946 million



# Section 3: AV Requirements and Registration

## **Aggregator AVs and AV Roles (Section 3.1)**

- Aggregator AVs can act as Approved Vendors, developing projects and interacting with the market.

## **Aggregator AV and Designee Partnership and Roles**

- Either the Aggregator AV or the Designee may enter and manage project applications in the ILSFA portal.

## **Subcontractors and Contracting with Customers**

- Subcontractors who interact and contract with customers will be required to register with the Program Administrator.

## **AV Registration (Section 3.3)**

- Prospective AVs must register by stated deadlines to ensure review/approval before PY submittal window and must respond to Program Administrator information requests within 10 business days.



# AV Conduct and Discipline: Prohibited Activities

**Section 3.6 covers what constitutes a disciplinary measure and how disciplinary measures will be handled. A suspended AV is prohibited from project development activities including:**

- Generating new disclosures
- Generating new project applications
- Moving forward on already generated disclosure forms and/or in-progress project applications
- Marketing of any kind regarding the Program on any platform
- Partnering with an AV and/or Designee in good standing to work around Program suspension

**The IPA will determine on a case by case basis whether an Approved Vendor suspended from participation in ILSFA will also be suspended from participation in the ABP. An Approved Vendor suspended from the Adjustable Block Program will automatically be suspended from ILSFA.**



# Designee Suspension: Prohibited Activities

**When the Program Administrator communicates that a Designee is suspended, the Designee cannot:**

- Generate new disclosures
- Move forward on already generated disclosure forms
- Collaborate with the Designee's AV(s) to convert disclosure forms into project applications
- Market the Program
- Use Program materials in customer acquisition
- Mention ILSFA while performing customer acquisition outreach, including any statements implying the availability of program incentives through outreach
- Partner with an AV or Designee in good standing to work around Program suspension



# Disciplinary Actions, continued

- The Program Administrator will maintain a public report of disciplinary actions taken involving AVs/Designees.
- This public report helps ensure that all AVs/Designees are aware of disciplinary decisions.

**NOTE:** The IPA will determine on a case by case basis whether a Designee suspended from participation in ILSFA will also be suspended from participation in the IPA's Adjustable Block Program (also known as Illinois Shines). A Designee suspended from the Adjustable Block Program will automatically be suspended from ILSFA.



## Section 4: Project and Participant Eligibility



# Project Eligibility

## No Upfront Cost Requirement

- The Revised Plan states that the no upfront cost requirement does not apply to 5+ unit buildings or NP/PF projects.

## Public Entities as Community-Based Organizations

A public entity may qualify as a community-based organization in order to demonstrate community engagement for a community solar project if it meets the following requirements. The public entity must:

- Represent a municipality or county in the bottom 25% of the state by population
- Certify that no local community-based organizations capable of filling this role exist
- Provide the same showing of robust community engagement as a non-profit would be required to show
- Public entities that have failed to act as community-based partners in a past project certification would be ineligible.



# Participant Eligibility

## Non-Profit/Public Facilities Eligibility

- System serves the energy load of a building that is occupied by an organization (or in the case of a public facility a department/agency) that is a Critical Service Provider (CSP)

### AND

- Has sufficient connection to and input from the LI communities or EJC members that the non-profit or public entity serves

Because all non-profits/public facilities must also be CSP – have built out the process for requesting recognition as a CSP if not already on the list – see Section 4.2 for more details.



# Section 5: Participant Savings Requirements





# Participant Savings Requirements

**Where a NP/PF project owner applies for the federal Income Tax Credit (ITC), the savings requirement must be at least 65% of the energy value.**

## **Section 5.4 Savings Calculations**

- AVs should use the rate given in the disclosure form based on the utility territory in which the project is located or, for customers using an ARES or enrolled in an hourly pricing program, an average rate based on 12 months of customer bills may be used.
- For NP/PF customers, the average rate based on 12 months of customer bills must be used if available. If a facility does not have a year of electric usage history, use the rate of the new service and estimate kWh usage from the facility's architect/engineer or another source such as a utility estimate or EPA Energy Star Portfolio Manager and provide the methodology for load estimation in the project application.



## Section 5.6: Participant Savings, continued

### **Tangible Benefits and Value to Participants**

Requirements for master metered building serving as community solar subscriber with RECs paid at LICs price:

- Savings value is passed to tenants
- Small subscriber adders only apply if master metered building is less than 25kW
- Income verification of tenants is submitted following guidelines in Section 6.3
- A master metered building may participate as an anchor tenant without tenant income verification and receive the applicable ABP REC price.



## Section 6: Project and Participant Verification



# Clarification on Income Verification Process

- Adults in multi-adult households do not need to use the same income verification method
- An income affidavit is needed for adults with zero income or income with no documentation
- Supporting documentation is only needed for the income verification method selected
- Income for all adults should be recorded in the table in the relevant Certification and Consent Form (Basic Information Form)
- As a part of the Revised Plan the Program Administrator may work directly with a potential participant to verify income. Stakeholder process on income verification and a referral process will happen later in the summer.



# Clarification on Third-Party Programs

- The table of programs should be used to determine whether the program applies to an individual or a household
- SNAP benefits are a household benefit (not individual)
- Even with third-party program verification, income must be listed on the Certification and Consent Form (Basic Information Form).
- No tax transcript, paycheck stubs, or tax forms are necessary if using the third-party programs verification method.



# Whole Building Verification

- Can be used to determine eligibility for buildings with five or more residential units
- Rent Rolls
  - 50% or more units have rent at/below HUD Fair Market
- Affordable Housing
  - monthly housing costs of no more than 30% of the maximum allowable income
- Program Qualification
  - HUD Project Voucher
  - Rental Assistance (section 8)
  - Income Eligible Multi-Family Energy Efficiency Program
- Submit Basic Information Form
- Include list of residents and documentation



# Section 7: Marketing and Consumer Protection Requirements



# Section 7.1: Consumer Protections

- AVs should refer and adhere to the Consumer Protections Guidelines. **NOTE** these guidelines will be updated in the coming weeks to reflect the changes in the Approved Vendor Manual and the Revised Plan and will be emailed to all AVs upon completion.
  - [Consumer Protections for Low-Income Distributed Generation](#)
  - [Consumer Protections for Low-Income Community Solar](#)
- Additionally, the [Program Resources Guide](#) has been updated; AVs are required to share the resources it catalogues when applicable to support mitigation plans.





## Section 7.2: Program Brochures

- AVs are **required** to present the relevant sub-program brochure to customers at:
  1. First contact (in person or online)
  2. Execution of contract
- Brochure(s) should be available on any webpage that promotes ILFSA or on any webpages linked on adapted ILSFA marketing materials.
- If shared electronically, the brochure(s) must be a downloaded file (attachment), not merely hyperlinked in an email or other digital communication.



## Section 7.4: Adapting Marketing Materials

- **Requirement:**

- All marketing and promotional materials, printed or digital, produced by an AV must be submitted for review.
- Materials should be submitted three weeks prior to the intended distribution date to [info@IllinoisSFA.com](mailto:info@IllinoisSFA.com).

- **Violations:**

- Barring emergencies, disciplinary determinations will not be made without AVs having the opportunity to provide oral or written explanations.
- Appeals can be made to the IPA, and the full appeals process has been added to the manual.

## Section 7.4: Adapting Marketing Materials

- **Accurate Portrayal of Identity and Affiliation:**
  - Marketing materials shall not refer to the ICC, the IPA, the Program Administrator, or the State of Illinois, in any manner that is deceptive or misleading.
- **Testimonials:**
  - AVs may use testimonials by actual customers to advertise customer experience.
  - All testimonials must include a disclaimer that user experience may differ.
  - The IPA may request documentation to validate the accuracy of testimonials including verification of the identity of the testifier.



# Section 8: Project Submission Processes

# Section 8.1: Project Submission Process Overview:

## Cure Period

- Although the cure period is intended to address issues due to oversight or mistake, note that all submissions should be checked for accuracy and the Program Administrator may reject a submission or discipline any Approved Vendor suspected of purposefully submitting placeholder or blank documents.
  - Interconnection agreements must be dated before the application window deadline.
  - Contracts with MWBE sub-contractors must be signed by both parties prior to the submission window deadline.



# Switching a Part I Application's Approved Vendor:

- A project that has been waitlisted or otherwise not yet selected for a REC Contract may change its AV.
- This switch of Approved Vendor can be for an individual project that is a subset of a larger batch (although minimum batch size requirements would still apply)
- “Transferee” must provide the Program Administrator with a binding document wherein both agree that the Transferee shall have rights to the RECs produced by the project and the authorization to represent the project for an ILSFA application.
- The documentation also must show that the project host and the project owner, if different, consent to the change of Approved Vendor.



# Switching a Part I Application's Approved Vendor, continued

- If a project was submitted co-located with another project, it will continue to be deemed co-located after any change of AV.
- Any co-located pricing or array layout requirements will still apply after a potential change of AV.
- The transferred project, if community solar, could, if applicable, be newly considered co-located after being received by the Transferee AV.
- The co-located pricing provision will only be applicable if the ICC's approval of the second project is within one year or less of the Commission's approval of the first project. If the first project has not yet received ICC approval at the time of the second project's approval, then the co-located pricing provision will apply.



## Section 8.2: Disclosures

- Clarification that AVs must complete and provide standard disclosure forms to each program participant, **and obtain the participant's signature**, prior to contract execution **with the participant**.
- The [Sample Low-Income Community Solar Subscription Disclosure](#) link has been added
- Added the note that if the AC size of a system as submitted in Part I differs by more than 5% or 1 kW, whichever is greater, from the AC system size noted in that application's disclosure form, a new disclosure form will be required.



## Section 8.3: Batches

### Clarifies “When batching is required” to reflect changes to Revise LTRRPP

- Approved Vendors who have not yet had a contract approved by the ICC are required to submit projects in batches of at least 50kW of projects, and 75% of the capacity of that batch must be verified to be approved.
- For established Approved Vendors who have already had a contract approved by the ICC, projects may be submitted individually during the project submission window or on a rolling basis, if Project Selection is not necessary for a given sub-program.



## Section 8.4: Part I Project Approval

- There has been an added footnote about latitude/longitude as in the Nov 2019 ABP Program Guidebook at Section 5(E)
- Filename structure: [Project #]\_Cert and Cons
- Added that photo documentation, as detailed in section 14.3, is now required for a Part I Project Submission
- Signed contracts with MWBE subcontractors for any project intending to request MWBE points as a part of Project Selection
- To reflect changes to the Revised LTRRPP, critical service provider documentation must be submitted with the Part I application
- Interconnection agreements must be dated prior to the project submission window opening, for projects larger than 25 kW



## Section 8.5: Part II Project Approval

- Clarifies what is included in Final System Cost
- Adds the same Photo Documentation requirement as in Section 14.3
- For projects that included a commitment to utilize MWBE subcontractors as part of the Project Selection Protocol must provide invoices showing payment to the MWBE subcontractor(s)
- Proof that the project has initiated the Irrevocable Standing Order without an end date in the REC tracking registry



## Section 8.5: Part II Project Approval Variations In Final System Size

- Variations in final system size (in aggregate inverter capacity AC) that exceed the larger of 5 kW or 25% (e.g. system sizes that are larger or smaller than the Part I approved project application) will be rejected and must re-apply. (Changes to the DC size of the system are governed by ensuring that the 155% DC/AC ratio is not exceeded; refer to Section 10.12 for the full requirement.)
- Switching between tracking system types and non-tracked systems is allowed; however, the lower of the Part I capacity factor or Part II capacity factor must be used. Switching tracking system types by itself is not sufficient to qualify for an exception. At least one additional criterion herein must be met to qualify for an exception.



## Section 9: Project Selection and Prioritization



# Low-Income Community Solar Scoring Update

Attribute:	Definition:	Score
EJC or LI	Located within a qualifying ILSFA environmental justice community (EJC) or Low-Income community (depending on the stage of project selection)	2
MWBE	An Approved Vendor, Approved Vendor Aggregator, or an Approved Vendor Designee (if the Designee is the entity submitting the project Application) that is registered with public or non-public third-party certifying bodies approved by ComEd and Ameren Illinois, including but not limited to, the National Minority Supplier Development Council and its regional affiliates, and the Women’s Business Enterprise National Council and its regional affiliates.	2
	An Approved Vendor, Approved Vendor Aggregator, or Approved Vendor Designee who has demonstrated for the applicable project contractual commitments with MWBE subcontractors of 50% or more of the proposed REC contract value. The contractual commitments must be met prior to energization	
Utility Service Territory not chosen in EJs Prioritization 1	Any utility service territory for which project(s) were not chosen in EJs Prioritization 1	2
Anchor Type	Anchor is a non-profit or public facility. The anchor institution must provide an LOI, and the anchor tenant subscription must be at least 10% and project size, and not more than 40% of project size.	2
Project host	Additional if the Anchor NP/PF is also the project host.	0.75
Critical Service Provider	Additional if the Anchor NP/PF is also a critical service provider.	0.5
System size ≤ 100 kW	Eligible project is less than or equal to 100 kW	1.5
System size > 100 kW ≤ 500 kW	Eligible project is greater than 100 kW and less than or equal to 500 kW	1
System size > 500 kW ≤ 1000 kW	Eligible project is greater than 500 kW and less than or equal to 1000 kW.	0.5

# Distributed Generation Selection Processes

The LIDG sub-program project selection process must account for the following program requirements:

- 75% limit on budget allocation to 5+ unit building projects within the first 9 months of the program year.
- 25% of each sub-program budget must be allocated to projects located in EICs

To better account for this, two separate project selection processes, one for 1-4 unit building projects and one for 5+ unit building projects, will be held for the LIDG sub-program.



# MWBE Points for Approved Vendors

To be awarded points, the MWBE must be registered with public or non-public third-party certifying bodies approved by ComEd and Ameren Illinois, including but not limited to, the National Minority Supplier Development Council and its regional affiliates, and the Women's Business Enterprise National Council and its regional affiliates. Eligible MWBEs can include:

- Approved Vendors
- Approved Vendor Aggregators, or
- Designees associated with them if the application comes from that Designee

MWBE must submit an [ILSFA Approved Vendor Questionnaire to vendors@IllinoisSFA.com](mailto:vendors@IllinoisSFA.com).





# MWBE Points for Subcontractors

Points will be awarded to projects submitted by AVs working with MWBE subcontractors if the value of subcontractor's contract on the project is 50% or more of the project's REC contract value.

For a community solar project, the REC contract value will, for purposes of calculating that commitment, be based upon the REC contract value not including any small subscriber adder.

**Part I project submission** must include:

- Subcontractor's ILSFA Approved Vendor Questionnaire
- Signed contracts



# MWBE Points for Subcontractors, continued

ILSFA contracts will be updated to:

- 1) Reflect that contract (or product order, as applicable) rescission prior to payment, including forfeiture of collateral, is a consequence should an AV fail to satisfy the minimum required MWBE contractual commitment.
- 2) Require that any contract assignment requires the assignee to assume all MWBE utilization obligations.

**Part II project submission** must include:

- Invoices showing payment to the MWBE subcontractor
- Documentation demonstrating one or more of the circumstances outlined in the Project Selection Protocol requiring a change from the originally identified MWBE subcontractor, along with the new subcontractor's ILSFA Approved Vendor Questionnaire.



# Points for NP/PF Savings

Because of the Revised Plan update requiring savings of at least 65% of the energy value for NP/PF projects where the owner applies for the federal Investment Tax Credit (ITC), the points for savings for NP/PF projects have been updated to balance the requirements between the AVs taking the ITC and those who are not.

The following are the points awarded for participant savings above the minimum requirement of either 50% or 65% (depending on if the AV is taking the ITC):

<b>&lt;= +10%</b>	<b>0.25 points</b>
<b>+11% to +30%</b>	<b>1 point</b>
<b>+31% and greater</b>	<b>2 points</b>

# Sections 10: System Requirements



# Section 10.7: Co-Location of LICs Projects

## Co-located Community Solar Projects

- There is a separate REC price for co-located systems exceeding 2 MW in aggregate size. Where the initial project under 2MW in capacity has been contracted at the non-co-located system REC price, the REC price applicable to subsequent systems (up to 4MW total) will be adjusted downward to create contract value across the two co-located systems that reflects the aggregate system capacity exceeding 2 MW.

# Section 10.11: REC Quantity Calculation

## REC Quantity Method Changes

- Switching among production estimate calculation methodologies between Part I and Part II is permitted only if accompanied by a decrease in the capacity factor. Subject to all of the above, the lower of (i) the product of the Part I capacity factor and the Part I project size and (ii) the product of the Part II capacity factor and the Part II project size will be used to establish a number of RECs for contractual payment and delivery obligation.

# Section 10.14: Systems that Directly Serve DC Loads

## DC Metering

- Pursuant to the Agency's Revised Long-Term Renewable Resources Procurement Plan, it is still premature to incorporate a DC metering standard into the ILSFA Program, but the IPA is committed to continuing its dialogue with industry professionals to understand the development of DC metering.

# Sections 11-13: REC Management, Annual Reports and System Performance Evaluations, and Invoicing and Payments





# REC Management

## Section 11.1: Contracting Process

- An AV may assign the entire REC contract or any product orders/batch in their entirety to another AV, and they must sign and submit the [Acknowledgement of Assignment](#) or [Acknowledgement of Assignment and Consent](#).

## Section 11.2: REC Delivery

- Where IPA is the counterparty for a project's REC contract, AVs should use IPA's GATS account "Illinois Solar for All – IPA" as the recipient for the irrevocable standing order. AVs using M-RETS should establish the irrevocable standing order with the account "IPA."



# Section 11.3: REC Management, Continued

## Low-Income Community Solar REC Value Calculation

- All subscribers to a LICS project (including non-anchor, non-low-income residential subscribers) must receive and execute a Low-Income Community Solar Standard Disclosure Form.
- Subscription levels will additionally be verified with the interconnecting utility.



# Section 12.3: Annual Reports and System Performance Evaluation

## Collateral and Performance Evaluation

- Under-performance by any system in either REC deliveries or community solar subscriptions can trigger a collateral drawdown for a delivery year based on the difference between the allocated REC payment paid for that delivery year and the allocated payment amount that the system was entitled to for that delivery year.



## Section 13: Invoicing and Payments

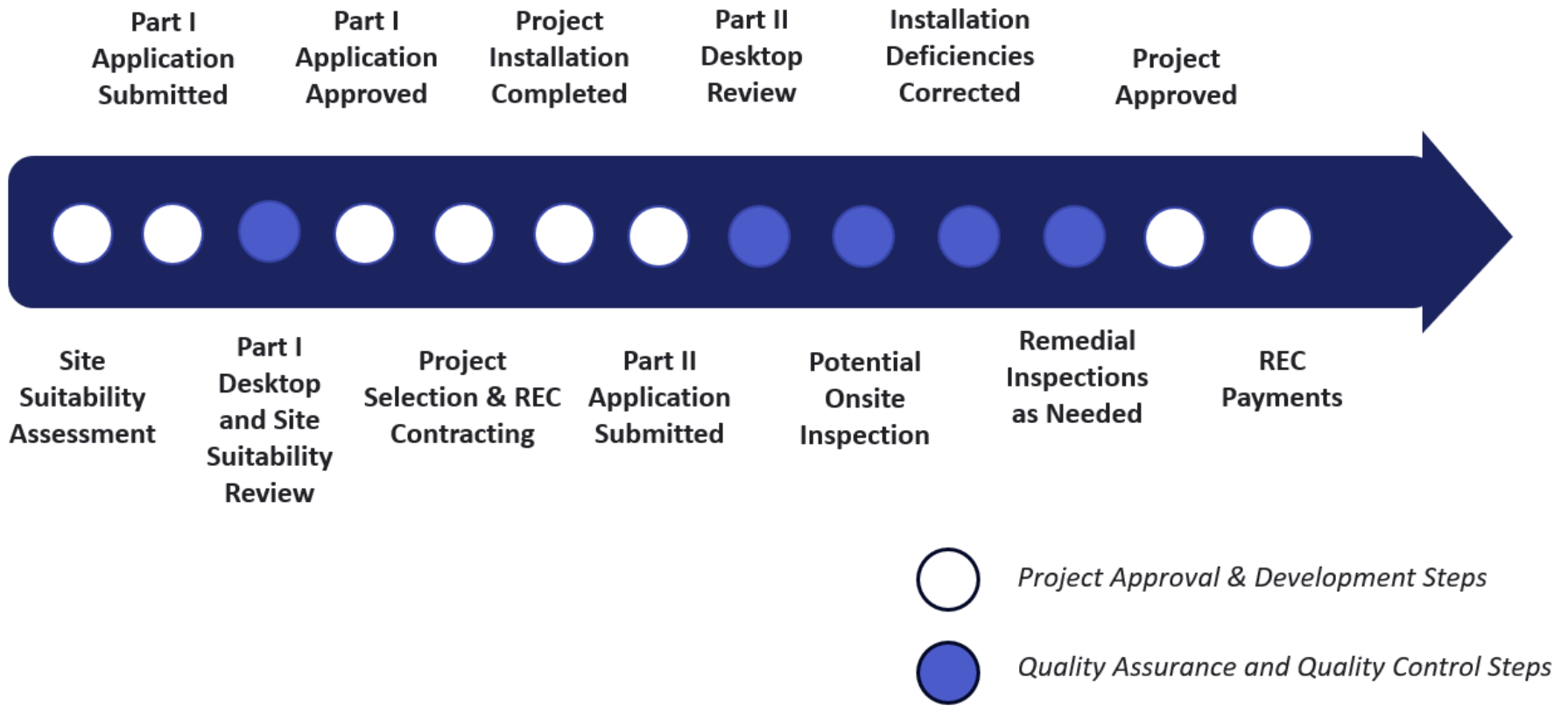
- AVs can submit invoices only for energized and Part II approved systems.
- REC quantity calculations for REC payment use the lesser of the Part I capacity multiplied by the Part I capacity factor or the actual Part II capacity multiplied by the Part II capacity factor.
- Subscription shares will be re-evaluated, with the quantity of RECs to be paid for and obligated then fixed for the life of the contract, at the end of the fourth full quarter after energization.



# Section 14: Quality Assurance Overview



# Section 14.1: Quality Assurance Overview



# Section 14.3: Photo Documentation

- **Electrical Photo Documentation Requirement For Part II Project Application-Interconnection Includes:**
  - Load-Side Connection
  - Supply-Side or Line-Side Connection

## Section 14.4: Onsite Inspections

- Onsite inspections will be conducted by qualified Program Administrator Field Inspectors.
- AVs will have 20 business days to remedy issues identified in onsite inspections
- It is the responsibility of the AV to secure site access and ensure a representative can accompany the Field Inspector during the inspection.





# Section 15: Job Training Requirements and Verification



# Section 15.1: Portfolio Requirements

- The timeline for the increasing annual percentage Portfolio Requirements will start with the beginning of construction of the AV's first project contracted under the Program.

Approved Vendor Program Year	Cumulative Job Training Requirement
1	10% of all hours are performed by eligible trainees
2	20% of all hours are performed by eligible trainees
3 and beyond	33% of all hours are performed by eligible trainees

## Section 15.1: LIDG Requirements

- The LIDG requirements prescribe that 33% of all installations across an AV's one- to four-unit and five or more-unit DG projects annually include at least one eligible trainee.
- No minimum hours per project or cumulative total hours are prescribed for this requirement, only that a requisite percentage of projects utilize at least one eligible trainee.
- AVs with LIDG projects in addition to projects in other sub-programs must also fulfill the Portfolio Requirements.



# Section 15.1: Approved Vendor Annual Requirements Calendar

- The date that is considered the beginning of the AV's first year, in which the AV must start meeting job training requirements, is the date construction begins on the AV's first contracted project under the Program.
- If project development occurs over multiple years, the work hours for that project will be included in the year the project was contracted under the Program.
- All Single Project Approved Vendor projects must meet the job training requirement of 10% of all hours being performed by eligible trainees.



## Section 15.2: FEJA Workforce Development Programs

These include three categories of programs funded by the Act, including:

- The Solar Training Pipeline Program
- The Craft Apprenticeship Program
- The Multi-Cultural Jobs Programs

Details about the FEJA Workforce Development Programs including contact information, program focus and calendars can be found at <https://www.illinoissfa.com/job-training/>



## Section 15.2: Other Qualifying Programs

- ILSFA AVs may also request to use eligible trainees from an Other Qualifying Program, so long as they can demonstrate that completion of the job training program would lead to the eligible trainee becoming a Qualified Person under the 83 Ill. Adm. Code 468.20 related to the certification of installers of photovoltaic systems.
- To become a Qualified Job Trainee for an ILSFA project from an Other Qualifying Program, an eligible trainee will have completed 50% or more of the classroom requirements for one of the training categories listed above. The application to become an Other Qualifying Program will request information such as detailed curriculum and official program accreditation documents.



## Section 15.2: Other Qualifying Programs, continued.

- Code Part 468.20 provides that Qualified Person status may be conferred upon individuals who have successfully completed at least one of the following programs requiring lab or field work:
  - An apprenticeship as a journeyman electrician from a DOL registered electrical apprenticeship and training program;
  - A North American Board of Certified Energy Practitioners (NABCEP) distributed generation technology certification program;
  - An Underwriters Laboratories (UL) distributed generation technology certification program;
  - An Electronics Technicians Association (ETA) distributed generation technology certification; program; or
  - An associate in applied science degree from an Illinois Community College Board approved community college program in the appropriate distributed generation technology.



# Section 15.2: Performance Tracking and Role of the Qualified Job Trainee on ILSFA Projects

- The Qualified Job Trainee(s) may participate in ILSFA projects in a direct or support role in the categories of System Design, Installation, System Commissioning, and Operations/Maintenance, as categorized by NABCEP, or the category of Technical Sales/Other.
- The work of the trainee(s) can be on or off the project site but must be specific to the ILSFA project.

TABLE 15.2. ACTIVITIES BY JOB TASK CATEGORY

System Design	Installation	System Commissioning
<ul style="list-style-type: none"> <li>• Site assessment</li> <li>• Shading analysis</li> <li>• Electrical design</li> <li>• Mechanical design</li> <li>• Engineering</li> <li>• Procurement</li> <li>• Permitting</li> <li>• Zoning</li> </ul>	<ul style="list-style-type: none"> <li>• Install electrical</li> <li>• Roofing</li> <li>• Structural</li> <li>• Racking</li> <li>• Modules</li> <li>• Carpentry</li> <li>• Fencing</li> <li>• Health and safety</li> <li>• Battery</li> <li>• Monitoring controls</li> <li>• Foundation</li> </ul>	<ul style="list-style-type: none"> <li>• Interconnection</li> <li>• Visual and mechanical inspection</li> <li>• Component testing</li> <li>• Electrical testing</li> <li>• System monitoring</li> <li>• User training</li> <li>• Utility commissioning</li> </ul>
Operations/Maintenance	Technical Sales/Other	
<ul style="list-style-type: none"> <li>• Preventative maintenance</li> <li>• Corrective maintenance</li> <li>• System monitoring</li> <li>• Component testing</li> <li>• Component replacement</li> </ul>	<ul style="list-style-type: none"> <li>• Sales</li> <li>• Customer service</li> <li>• Subscriber management</li> <li>• Financial modeling</li> </ul>	



## Section 15.3: The Affidavit Process

- The ILSFA Job Training Project Summary Affidavit (Project Affidavit) and the ILSFA Qualified Job Trainee Affidavit (Trainee Affidavit) documents must be completed for each ILSFA project.
- The affidavits include information about all employees/subcontractors/installers/agents of the AV working on ILSFA projects, the categories of work performed, and the number of hours for each. The affidavits will also include information on the qualifying job training program for each Qualified Job Trainee.
- Documentation of hours and salary supporting information recorded on the affidavits shall be accessible to the Program Administrator upon request for up to four years after the submission of the affidavits.



## Section 15.4: When to Apply for a Job Training Waiver

- The ILSFA Project Waiver for Job Training Requirements (Project Waiver) is represented as a series of questions; the answers may demonstrate a good faith effort on the part of the AV and/or their subcontractor/installer/agent to meet the job training requirements.
- Waivers will be considered on a case-by-case basis. Each Project Waiver application will come to a determination of pass or fail based on these responses and associated documentation.
- Within the Project Waiver, the good faith effort explanation must include all supporting documentation, including emails, contact numbers, timelines, dates, and any other relevant information. Missing or incomplete information is not considered. Please see the Project Waiver Evaluation Rubric for guidance.



## Section 15.5: Validation and Remediation

- The Program Administrator will conduct validation checks with registered job trainees and/or job training program providers/facilitators to verify data provided by the AVs.
- AVs who are found to have missing or insufficient information for a given project will be notified of their non-compliance and be given the opportunity to make corrections and/or supplement that information.
- If it is determined that an AV has provided false or misleading information on a project, eligible trainee hours will not count towards annual goal requirements and the AV will be placed on a probationary status, as detailed in Section 3 of this manual.
- Multiple instances of an AV providing false or misleading information in one sampling, or the discovery of subsequent infractions while an AV is on probationary status, may lead to suspension from the program.



# Questions?



# Contact Information

## ILSFA Program Manager:

Laura Oakleaf

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773-906-5134

## Job Training Requirements:

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## ILSFA Marketing:

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