

ILSFA Approved Vendor Registration Rubric DRAFT Dec 17, 2018

Question	Rubric	Minimum Score Required	Total Possible Score	Candidate Score	Rubric Comments
A. Pre-Requirement: Adjustable Block Program Qualification					
1. Has Adjustable Block Program qualifying identification date	YES/NO	NOT SCORED	NOT SCORED	NOT SCORED	The single identification number assigned to the Approved vendor registration by the Adjustable Block Program administrator.
B. Project Types & Communities					
2. List the sub-program(s) you intend to apply to your projects: a) Low Income Distributed Generation: 1-4 unit buildings b) Nonprofits and Public Facilities	MULTIPLE CHOICE	NOT SCORED	NOT SCORED	NOT SCORED	SELECT ALL THAT APPLY. Select each sub-program in which your organization plans to participate. There are no specific requirements for approved vendors to submit to meet their sub-program. NOT selecting a sub-program at registration does not preclude an Approved vendor from submitting projects under their sub-program.
3. Have you been awarded a Long-Term Approved Vendor?	YES/NO	NOT SCORED	NOT SCORED	NOT SCORED	
4. Describe the communities where your developments will occur (State, County, City, Neighborhood): 1- Communities have been identified in detail 2- Communities have been identified 3- Communities have not yet been determined		2	3	2	Provide the areas where your organization plans to market solar development projects. Provide the geographic locations in as much detail as is known at this time, including county, town or city, as well as neighborhood/communities. Providing no specific locations will receive the lowest score. When providing more detailed and specific locations will receive the highest score.
5. Will projects be sited in Environmental Justice Communities? 1- More than 50% of all projects will be sited in EJ communities 2- Between 25% and 50% of all projects will be sited in EJ communities 3- Unknown at this time		NOT SCORED	NOT SCORED	NOT SCORED	Eligible Siter for All has identified environmental justice communities across the state. Each qualified environmental justice community will be identified on an interactive map of the state. A link to that map will be provided that allows users to specify the address the state to determine whether or not it resides in a qualified EJ community.
6. Will projects be sited in Environmental Justice Communities? What percentage of projects will be in EJ communities? 1- Between 25% and 50% of all projects will be sited in EJ communities 2- Unknown at this time 3- EJ communities will not be targeted		5	3	3	Please provide your organization's store or serving environmental justice communities. Does your organization intend to develop solar projects in these communities? Will you target these communities specifically? If so, what percentage of the developed capacity in your portfolio being within these qualified communities? If your organization identified specific EJ communities you will seek to do so, which communities? While there will be no requirements to meet this target, metrics will be tracked and reported regularly.
C. Community Engagement Plan					
A) PROJECT TYPES					
7. Describe your plans for community involvement. If your narrative does not include: a) What is your team's experience with outreach and engagement in low income and environmental justice communities. b) What types of community organizations will you seek to partner with? c) Describe what efforts have been taken to date to conduct community outreach, education, recruitment. d) What methods of outreach and engagement will you use to reach participants? e) What methods of outreach and engagement will you use to reach participants? f) What methods of outreach and engagement will you use to reach participants? g) What is the intended rate of qualified low income subscribers, market rate subscribers and other subscribers? h) Will your community solar projects target nonprofit/public sector projects?					
8. What tools of outreach materials and methods will be used? How will these differ by community?	1- Significant experience 2- Some experience 3- No experience	3	1	1	Please describe your organization's experience with outreach and engagement in low income or environmental justice communities inside or outside of Broadband Outreach Marketing, Outreach and engagement were used? If your organization has limited or no experience outside of these communities, are there individuals within your organization that have prior experience conducting marketing, outreach and engagement in low income or environmental justice communities? Please include experience outside of solar development in these communities is pertinent to the question, if not. Specific experience is not required for Broadband for All. Greater experience (number of years, number of communities, various methods) for the organization and/or individuals will receive higher scores. No experience will receive a score of 1.
9. Indicate the communities where solar customer acquisition will occur (State, County, City, Neighborhood): 1- No communities identified 2- General idea of communities 3- Specific ideas of communities 4- General idea of communities 5- No communities identified	1- Specific organizations identified 2- Organization types identified 3- No organizations identified	2	3	2	While only the low income community solar program has specific requirements for engaging community organizations as outlined in Section 8.2 of the Long-Term Renewable Resource Procurement Plan, community engagement is seen as an integral part of any effective marketing and outreach strategy for low income and environmental justice communities. This engagement is most effective when working with community organizations in the communities being served. Please describe whether or not your organization intends on partnering with community organizations to conduct marketing, outreach and education programs. What types of organizations do you anticipate engaging? Other specific organizations do you anticipate engaging? While there are no minimum requirements to identify the response, a list of organization types will gain a moderate score, while a list of specific organizations will yield a higher score. Providing no organization information will yield the lowest score.
10. Indicate the communities where installations will be sited: 1- High probability of effectiveness 2- Moderate probability of effectiveness 3- Low probability of effectiveness 4- No methods identified	1- Moderate effort 2- Some effort 3- None	4	3	3	Please describe what efforts have been undertaken to date by your organization to conduct outreach, education or community engagement for Broadband for All. While there are no specific requirements for engagement prior to registration and approved vendor, specific efforts prior to registration will yield higher points. For example, attending community meetings, engaging community organizations or conducting outreach campaigns demonstrates specific effort and gains higher points.
11. What methods of outreach and engagement will you use to seek community organization support? 1- High probability of effectiveness 2- Moderate probability of effectiveness 3- Low probability of effectiveness 4- No methods identified	1- High probability of meeting requirements 2- Moderate probability of meeting requirements 3- Low probability of meeting requirements 4- No methods identified	6	8	6	Specific engagement experience or activities to date are not required to register solar in Broadband for All approved vendor. Having an approved vendor plan to develop an important part of marketing, outreach and engagement. What tactics will be used to develop marketing materials, conduct marketing, engage community and acquire customers, how will your strategy for marketing, outreach and engagement differ from a general outreach strategy? Plans that include both strategy and tactics plans, as well as an outreach and engagement plan have a higher probability of success and will receive a higher score.
12. What is the intended rate of qualified low income subscribers, market rate subscribers and other subscribers? 1- Specific ratio targeted 2- General range target 3- No target	1- Unknown plan	2	2	2	Please describe your organization's specific plans for developing marketing materials, strategies and tactics for low income and environmental justice communities.
COMMUNITY SOLAR ONLY					
13. What is the intended rate of qualified low income subscribers, market rate subscribers and other subscribers? 1- Specific ratio targeted 2- General range target 3- No target	1- Specific ideas of communities 2- General idea of communities 3- Specific ideas of communities 4- General idea of communities 5- No communities identified	2	3	2	Please indicate the communities where community solar subscribers will be targeted. Customer acquisition at registration is not required for Broadband for All, but, knowing the communities you will target should be indicated. More specificity will yield a higher score. Please indicate the communities where community solar installations will be sited. Specific sites are not required for Broadband for All registration. However, knowing the communities you will target should be indicated. More specificity will yield a higher score.
14. Will your community solar projects target nonprofit/public sector projects? 1- Yes 2- No 3- Unknown	1- High probability of effectiveness 2- Moderate probability of effectiveness 3- Low probability of effectiveness 4- No methods identified	3	4	3	Section 8.2 of the Long-Term Renewable Resource Procurement Plan indicates specific requirements for engaging community organizations or community-based organizations in the development of low income community solar projects. Requirements for projects include demonstrating the location, development and participation of communities, but also ensuring the partnership involves the priorities and concerns of the low income members of the community. What methods of outreach will your organization use to engage these communities and acquire customers? How will your strategy for marketing, outreach and engagement differ from a general outreach strategy? Plans that include both strategy and tactics plans, as well as an outreach and engagement plan have a higher probability of success and will receive a higher score.
15. Will your community solar projects target nonprofit/public sector projects? 1- Yes 2- No 3- Unknown	1- High probability of effectiveness 2- Moderate probability of effectiveness 3- Low probability of effectiveness 4- No methods identified	3	4	3	While project requirements for engaging community organizations are specific only to community solar, community engagement is not. Any other low income business, market rate or customer base. Please indicate the rate of community organizations will plan to partner with your organization's solar development. How will this differ by community or program type? Plans that include specific community organizations or organization types and how they will help with marketing, building awareness or ease customer acquisition have a greater probability of being effective. Plans that do not specifically list how individuals or organizations will be leveraged will have a lower probability of meeting these requirements.
16. Will your community solar projects target nonprofit/public sector projects? 1- Yes 2- No 3- Unknown	1- Specific ratio targeted 2- General range target 3- No target	3	2	2	While there are no specific requirements for the rate of low income to general market subscribers for low income community solar projects at the time of registration, indicating a specific target ratio will yield higher scores.
D. Job Training Requirements					
16. Will your company provide training services directly? a) If YES (10-15%) Does your company currently have an on-staff program for qualified job training programs? b) If YES (10-15%) What is your intended rate of personnel, full-time and part-time staff of qualified job training graduate hours or project installations? What job titles and functional roles will these individuals hold? c) If YES (10-15%) What is your intended rate of personnel, full-time and part-time staff of qualified job training graduate hours or project installations? What job titles and functional roles will these individuals hold?	1- More than one graduate on staff 2- At least one graduate on staff 3- No graduates on staff	NOT SCORED	NOT SCORED	NOT SCORED	Identified job training programs will be listed on the ILSFA website. These include job training programs funded by the Future Energy Jobs Act, as well as other programs that promote training that leads to the Qualified Energy Jobs Act. If your organization will conduct the installation, please indicate the number of qualified trainees you currently have or intend to have on staff. If not, please indicate the information will be an important part of your plan for meeting job training requirements as requested. (20)
17. Will your company provide training services indirectly? a) If YES (10-15%) Does your company currently have an on-staff program for qualified job training programs? b) If YES (10-15%) What is your intended rate of personnel, full-time and part-time staff of qualified job training graduate hours or project installations? What job titles and functional roles will these individuals hold? c) If YES (10-15%) What is your intended rate of personnel, full-time and part-time staff of qualified job training graduate hours or project installations? What job titles and functional roles will these individuals hold?	1- A very detailed plan 2- A detailed plan 3- A moderately detailed plan 4- A minimally detailed plan 5- No specific plan	4	5	4	Please indicate your plan for meeting the job training requirements of 20% of all installation hours across your project portfolio by qualified trainees and at least 1 job trainee on 33% of projects for Distributed Generation in the low income. If your organization will subcontract installation, please indicate how you will meet these requirements using subcontractors. Details should include anticipated number of staff needed for various project types, the roles they will play and how they will engage one another.
18. Will your company provide training services indirectly? a) If YES (10-15%) Does your company currently have an on-staff program for qualified job training programs? b) If YES (10-15%) What is your intended rate of personnel, full-time and part-time staff of qualified job training graduate hours or project installations? What job titles and functional roles will these individuals hold? c) If YES (10-15%) What is your intended rate of personnel, full-time and part-time staff of qualified job training graduate hours or project installations? What job titles and functional roles will these individuals hold?	1- A very detailed plan 2- A detailed plan 3- A moderately detailed plan 4- A minimally detailed plan 5- No specific plan	4	5	4	Please indicate how the plan to incorporate qualified job trainees will change in year three, when the requirements expand to 20% of all installation hours worked across your project portfolio by qualified job trainees and at least 1 job trainee on 33% of projects for Distributed Generation in the general market.
19. Will your company provide training services indirectly? a) If YES (10-15%) Does your company currently have an on-staff program for qualified job training programs? b) If YES (10-15%) What is your intended rate of personnel, full-time and part-time staff of qualified job training graduate hours or project installations? What job titles and functional roles will these individuals hold? c) If YES (10-15%) What is your intended rate of personnel, full-time and part-time staff of qualified job training graduate hours or project installations? What job titles and functional roles will these individuals hold?	1- A very detailed plan 2- A detailed plan 3- A moderately detailed plan 4- A minimally detailed plan 5- No specific plan	4	5	4	Please indicate how the plan to incorporate qualified job trainees will change in year three, when the requirements expand to 20% of all installation hours worked across your project portfolio by qualified job trainees and at least 1 job trainee on 33% of projects for Distributed Generation in the low income.
E. Consumer Protections					
17. Which of the following business models will your company offer? a) System Ownership b) System Lease c) Power Purchase Agreement d) Other (Please Specify)	1- At least one business model presented 2- Unknown	2	2	2	There are no requirements for having multiple business model offers to register for Broadband for All. However, it is necessary to have you offer at least one business model and that the business model will be. No business model may require ownership of energy purchase structure, i.e. customer-owned system, leased or PPA, as well as any other non-traditional model.
18. How will business models vary by project type or community? 1- Greater than 75% 2- Greater than 50% 3- 50% 4- Unknown	1- High probability of meeting requirement 2- Moderate probability of meeting requirement 3- Low probability of meeting requirement 4- Unknown	3	4	3	While the requirement for Broadband for All is that participants receive a minimum of 20% of the system generated value based on a qualifying program, ensuring benefits to participants is a goal of the program. Business models that are anticipated to pass on a greater level of savings will yield higher points at registration. While there will be no requirements to meet this target, other than the 20% minimum, metrics will be tracked and reported regularly.
19. What is the anticipated level of participant savings for each solar offer? 1- Greater than 75% 2- Greater than 50% 3- 50% 4- Unknown	1- High probability of meeting requirement 2- Moderate probability of meeting requirement 3- Low probability of meeting requirement 4- Unknown	3	4	3	The requirement that program participants can no offset costs can be met in a number of ways, by business and ownership structures, financing or creative payment structures with the requirement that projects have a net and a greater probability of offsetting or credit on their households. Financing options can be listed. Please indicate your organization's plan for mitigating these barriers and meeting the requirement. Plans that address the lower risks and barriers with specific solutions have a greater probability of meeting the requirement.
20. Will financing be provided to program participants? What financial institutions will your company partner with? Other on the list of partners of the financing agreements? How will participants qualify? 1- Yes 2- No 3- Unknown	1- Moderate or high probability of meeting requirement 2- Moderate probability of meeting requirement 3- Low probability of meeting requirement 4- No specific plan	3	4	3	ILSFA has a specific requirement for approved vendors to ensure rooftop solar projects are installed on properties with a minimum level of electrical capacity and household utility eligibility. The Site Suitability Guide provides the guidelines for assessing and reporting on properties. Please indicate how your organization will incorporate these standards into your site assessment process and ensure all projects meet these requirements. Greater detail in indicating how staff or subcontractors will be trained, collect data and report assessments will receive a higher score.
21. Will financing be provided to program participants? What financial institutions will your company partner with? Other on the list of partners of the financing agreements? How will participants qualify? 1- Yes 2- No 3- Unknown	1- Moderate or high probability of meeting requirement 2- Moderate probability of meeting requirement 3- Low probability of meeting requirement 4- No specific plan	3	2	2	ILSFA has a specific requirement that requires be provided to property owners relevant to specific issues identified in the site assessment, or well as other metrics, related to the financing opportunities relevant to their property. The Program Requirements Guide provides these targeted metrics. Please indicate how you will train staff or subcontractors to ensure these resources are understood and shared with each property owner. Greater detail in indicating how staff or subcontractors will be trained and documentation collected will have a greater probability of meeting the requirement.
22. Will your company provide marketing and contractual materials in languages other than English? 1- Yes 2- No 3- Unknown	1- Moderate or high probability of meeting requirement 2- Moderate probability of meeting requirement 3- Low probability of meeting requirement 4- No specific plan	2	2	2	While there are no requirements for providing marketing materials in languages other than English, applicants that commit to do so will receive a higher score.
23. Please indicate that you have read the ILSFA Solar Installation Site Suitability Guidelines and indicate how your company will ensure each project meets these guidelines. How will your company provide guidelines and resources to property owners interested in hosting solar distributed generation but whose properties do not pass the suitability criteria? 1- Moderate or high probability of meeting requirement 2- Moderate probability of meeting requirement 3- Low probability of meeting requirement 4- No specific plan	1- Moderate or high probability of meeting requirement 2- Moderate probability of meeting requirement 3- Low probability of meeting requirement 4- No specific plan	3	4	3	ILSFA has a specific requirement for approved vendors to ensure rooftop solar projects are installed on properties with a minimum level of electrical capacity and household utility eligibility. The Site Suitability Guide provides the guidelines for assessing and reporting on properties. Please indicate how your organization will incorporate these standards into your site assessment process and ensure all projects meet these requirements. Greater detail in indicating how staff or subcontractors will be trained, collect data and report assessments will receive a higher score.
24. Please indicate that you've read the Program Resource Guide. How will your company register energy efficiency and other program resources into your work? 1- Moderate or high probability of meeting requirement 2- Moderate probability of meeting requirement 3- Low probability of meeting requirement 4- No specific plan	1- Moderate or high probability of meeting requirement 2- Moderate probability of meeting requirement 3- Low probability of meeting requirement 4- No specific plan	3	2	2	ILSFA has a specific requirement that requires be provided to property owners relevant to specific issues identified in the site assessment, or well as other metrics, related to the financing opportunities relevant to their property. The Program Requirements Guide provides these targeted metrics. Please indicate how you will train staff or subcontractors to ensure these resources are understood and shared with each property owner. Greater detail in indicating how staff or subcontractors will be trained and documentation collected will have a greater probability of meeting the requirement.
25. Please describe the tools and methods used for system design and power generation projections. 1- Moderate or high probability of meeting requirement 2- Moderate probability of meeting requirement 3- Low probability of meeting requirement 4- No specific plan	1- Moderate or high probability of meeting requirement 2- Moderate probability of meeting requirement 3- Low probability of meeting requirement 4- No specific plan	NOT SCORED	NOT SCORED	NOT SCORED	

Category	Weight	Max Score
Project Types & Communities	15%	8
Community Engagement	25%	20
Community Solar Requirements	23%	17
Job Training Requirements	19%	15
Consumer Protections	24%	19
Total		79