

Illinois Solar for All

Approved Vendor Registration
Wednesday, December 19, 2018

Comments due no later than Monday Jan 7, 2019 at 12:00 PM CDT
Send comments to comments@illinoisfa.com

November 28, 2018



ELEVATE ENERGY
Smarter energy use for all

AECOM



Shelton Solutions Inc.

Agenda

- **Program Overview**
- **Role of the Approved Vendor**
- **Registration Process**
- **Registration Requirements**
- **Responses & Scoring Rubric**
- **Next Steps**



Program Overview

Adjustable Block Program & Illinois Solar for All Incentives

- » The Adjustable Block Program (ABP) provides incentives in the form of Renewable Energy Credit (REC) contracts to help accelerate solar deployment across the state.
- » The Illinois Solar for All Program (ILSFA) provides higher value REC contracts to help establish and grow the solar market in underserved communities.

What makes Illinois Solar for All distinct?

Illinois Solar for All provides incentives for solar projects developed for the benefit of low-income customers, environmental justice communities, and non-profit/public sector facilities.

- » The program is intended to motivate true engagement at the community level, opening up opportunities not available through the Adjustable Block Program
- » The higher incentives should serve to overcome barriers and compensate for more resource-intensive processes associated with development, while also providing direct benefits to customers

Illinois Solar for All Incentives & Benefits

- » ILSFA offers a higher value for RECs purchased from qualifying projects, paid to Approved Vendors upon energization at the value of the 15-year contract.
- » Job training requirements to accelerate workforce development
- » Minimum savings for participants

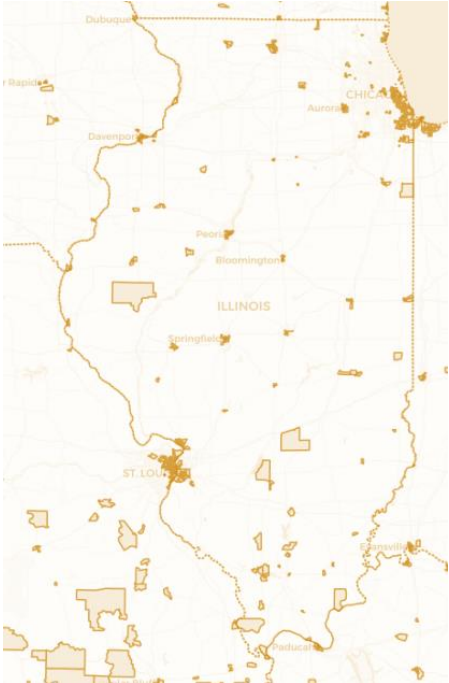
Serving Low- Income & Environmental Justice Communities

- » Residential property owners and renters, with an income of 80% or less Area Median Income (AMI)
- » Nonprofit and Public facilities serving low-income communities
- » Targeting 25% of incentives to serve Environmental Justice Communities

Program Incentive Categories



Distributed Generation



- » \$7.5 million per year
- » 50% savings on electricity*
- » No upfront cost to participants



Nonprofit/Public Facility

- » \$5 million per year
- » Nonprofit or Public Sector facilities
- » Connected to or within low-income/EJ communities
- » 50% savings on electricity*
- » No upfront cost to participants



Community Solar

- » \$12.5 million per year
- » Installed in low-income or EJ communities
- » And/or subscribed to by customers in low-income/ EJ communities
- » 50% savings on electricity*
- » No upfront cost to customer



Community Solar Pilots

- » \$5 million per year
- » Funding low-income community solar pilot projects
- » Competitive Procurement

**Savings is calculated by dividing total customer expenses for PV system by total system value passed to customers (typically cost ÷ bill credits).*

Program Funding Sources

» Renewable Energy Resources Fund (RERF)

- Held by the state of Illinois
- Originally funded from Alternative Retail Electric Suppliers (ARES) through Alternative Compliance Payments (ACP)
 - \$20 million per year

» Utility held Renewable Portfolio Standard (RPS) funds

- Ratepayer funded
 - \$10 million or 5% of RPS funds per plan year, whichever is greater

Resources

- » Long Term Renewable Resources Procurement Plan
 - Requirements for ILSFA as established by the Future Energy Jobs Act (FEJA) and the IPA
 - Overview of ILSFA and key program components, such as Approved Vendors
 - Will be updated in 2019 for 2020 implementation
- » IL Solar for All website – www.illinoisifa.com
 - Will become more robust as program launch nears

A construction worker wearing a white hard hat with 'GRID' written on it, a safety harness, and blue jeans is using a power drill on a roof. The worker is leaning forward, focused on the task. The background shows a blurred view of trees and a clear sky. A blue semi-transparent text box is overlaid on the lower left portion of the image.

Role of the Approved Vendor

The Role of the Approved Vendor

- » Work closely with the low income and environmental justice communities served
- » Develop innovative business models that maximize benefits to participants
- » Ensure participants are informed and protected
- » Build systems that are efficient and maximize power generation
- » Contribute to the development of a long term solar market in distressed communities

Approved Vendor Requirements

ABP Registration

- » All ILSFA Approved Vendors must first qualify for the ABP.
- » Data sharing and ongoing quality and performance monitoring between programs.

Community Engagement

- » Demonstrated community support for siting, business models and engagement practices.

Job Training

- » Clear plan for incorporating qualified training graduates into installations.
- » Minimum hours on installations annually.
- » Data sharing on all trainees used.

Consumer Protections

- » Contract and disclosures requirements.
- » Abide by marketing guidelines.
- » Commitment to inform and educate customers.

Approved Vendor Requirements

Financial Requirements

- » Demonstrated minimum savings for all qualified participants.
- » No upfront costs for all participants.
- » Commitment to 15 year value stream to customers.
- » 5% collateral on total REC value.

Site Suitability Requirements

- » Minimum requirements for rooftop solar installations.
- » Roof condition requirements.
- » Electrical system requirements.
- » Health and Safety requirements.
- » Details TBD

Program Resource Requirements

- » Requirements to share available resources with property owners.
- » Deferred maintenance mitigation resources.
- » Energy efficiency programs.
- » Incentives and financing.



Registration Process

15,600	195,025	702,015	585,090
25,000	1,452,600	326,900	50,859
1,350,652	180,650	45,980	31,958
152,000	1,002,150	359,200	

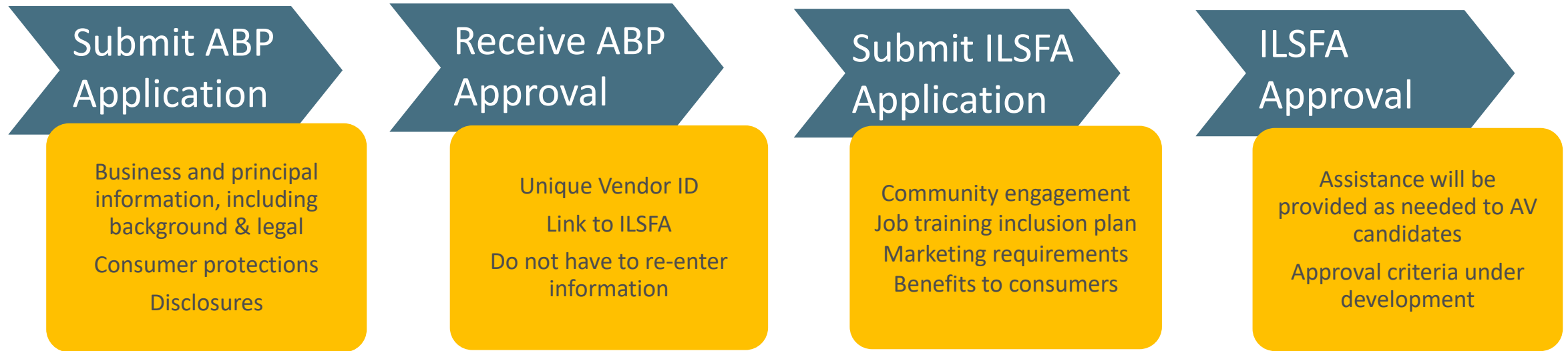
LTRRPP Registration Requirements

- » *“Participation in the Illinois Solar for All Program will be coordinated through Illinois Solar for All Approved Vendors who are approved through the process outlined in Section 6.9 [of the LTRRPP];”* i.e. the established registration process for the Adjustable Block Program.
- » [Applicants] *“will additionally have to register with the Illinois Solar for All Program and agree to additional terms and conditions in order to become an Illinois Solar for All Approved Vendor.”*

Integration with Adjustable Block Program (ABP)

- » Two-part vendor registration across programs
- » Will require data sharing across programs
- » Contracts facilitated by ABP
- » Approved Vendor status and quality tracked across programs

Registration Process



ILSFA Online Registration Portal

- » Password based online portal allows individual Approved Vendor accounts for registration.
- » Registration forms completed online, allowing text based responses, as well as document uploads.
- » Registration can be saved and completed in stages, as needed.
- » All Approved Vendors will have custom dashboards to monitor the registration process, project approvals and performance towards annual requirements.

- » Each Approved Vendor or candidate is assigned a dedicated Approved Vendor Manager.
- » This single-point of contact will provide support through the registration process.
- » Candidates with insufficient registration submissions will be provided guidance and support to correct inadequacies.
- » The Approved Vendor Manager will then serve as a single-point of contact for all project approvals and ongoing program support.

ILSFA Administrative Support



1. Are there any perceived barriers or concerns with the proposed two-stage process?
2. Will the online portal approach streamline or complicate the registration process?

Approved Vendor Registration Requirements



LTRRPP Registration Additional ILSFA Requirements

- » Providing narrative summary of efforts taken prior to the application to conduct community outreach, education, and recruitment.
- » Listing community-based organizations the applicant has partnered with, including letters from those organizations to verify the partnerships.
- » Describing in detail ongoing plans for community outreach, education, and recruitment.
- » Describing staffing for dedicated outreach, education, and recruitment.
- » Describing plans for ensuring that tangible economic benefits flow to program participants.
- » Participate in training offered by the Program Administrator on guidelines for marketing, contracting, and standard disclosures for program participants.

Proposed Approved Vendor Registration Submission

Coordination w/ ABP	Submission Content Requirements	Evaluation Criteria (TBD)
<ul style="list-style-type: none">» LTRRPP requires the same base qualifications for ABP and ILSFA.» Propose that all ILSFA Approved Vendors first qualify for the ABP.» Data sharing across programs to simplify process.	<ul style="list-style-type: none">» Planned project types and communities.» Plan for community engagement.» Plan for incorporating qualified Job Training program graduates.» Proposed business and customer savings models.	<ul style="list-style-type: none">» Balancing vendor experience with thoughtful planning.» Each submission area is addressed.» Meeting the spirit and the letter of the plan.

Scoring Approaches for Measuring Responses

	Rubric	Minimum Score Required	Total Possible Score
	14. What is your plan to meet the job training requirements? a) Year 1 plans (10% of installation hours worked)?		
<ul style="list-style-type: none"> » Binary: Pass/Fail <ul style="list-style-type: none"> - Pros = Simple - Cons = Some issues are not binary 	PASS/FAIL	PASS	
<ul style="list-style-type: none"> » Total Weighted Score <ul style="list-style-type: none"> - Pros = Allows for prioritizing issues - Cons = Provides no guidance to candidates 		6	10
<ul style="list-style-type: none"> » Rubric Approach <ul style="list-style-type: none"> - Pros = More clearly sets expectations - Cons = More complicated 	4 = A very detailed plan 3 = A moderately detailed plan 2 = A minimally detailed plan 1 = No specific plan	3	4

Minimum Score Requirements

- » Some responses have a minimum score requirement.
- » Applications will not be approved unless all minimum scores are met.
- » All minimum score response categories relate to specific program requirements

Proposed Rubric Approach

- » Allows more granularity with different scales and weights for each question.
- » Provides a clearer expectation of qualifying answers and relative scoring.
- » Allows for minimum threshold requirements as needed.

Weighted Categories

Category	Weight	Max Score
Project Types & Communities	10%	8
Community Engagement	25%	20
Community Solar Requirements	22%	17
Job Training Requirements	19%	15
Consumer Protections	24%	19



3. Does the proposed rubric approach allow for the right level of detail and expectation?
4. Are there other methods not accounted for here?
5. Are the weights for categories appropriate?

A close-up photograph of a person's hand holding a blue handheld device, possibly a scanner or a data entry tool, over a keyboard and some papers. The image is overlaid with a semi-transparent yellow grid pattern. A dark teal banner is positioned across the middle of the image, containing the text "Responses & Scoring Rubric" in white. The background is slightly blurred, showing a desk with a keyboard and some papers.

Responses & Scoring Rubric

Community Planning

- » Candidates will be asked to provide details on proposed project types and specific communities targeted.
- » At a minimum, candidates will have to have identified the communities where they will work.
- » No requirements for working in EJ communities. But, higher qualifying scores for those that do.

Question	Rubric	Minimum Score Required	Total Possible Score
A: Pre-Requisite: Adjustable Block Program Qualification			
1. Illinois Adjustable Block Program qualifying identification data	PASS/FAIL	NOT SCORED	NOT SCORED
B: Project Types & Communities			
2. List the sub-program(s) you intend to apply to for your projects.	MULTIPLE CHOICE	NOT SCORED	NOT SCORED
a) Low-income Distributed Generation: 1-4 unit buildings			
b) Low-income Distributed Generation: 5+ unit buildings			
c) Non-profit and Public facilities			
d) Low-income Community Solar			
3. Is this an application for a Single Project Approved Vendor?	YES/NO	NOT SCORED	NOT SCORED
4. Describe the communities where solar developments will occur (cities, towns, counties, neighborhoods).	3 = Communities have been identified in detail	2	3
	2 = Communities have been identified		
	1 = Communities have not yet been determined		
5. Will project types differ by community?		NOT SCORED	NOT SCORED
6. Will projects be sited in Environmental Justice Communities? What percentage of projects will be in EJ communities?	5 = More than 50% of all projects will be sited in EJ		5
	4 = Between 25% and 50% of all projects will be sited in EJ		
	3 = Between 0% and 25% of all projects will be sited in EJ		
	2 = Unkown at this time		
	1 = EJ communities will not be targeted		



6. Is it realistic that Approved Vendors will know the communities they will target at the registration stage?

Community Engagement

- » No requirements for experience in low-income/EJ communities, but higher scores if so.
- » Higher scores for existing partnerships w/ community organizations.
- » No requirements for efforts to date, but higher scores.
- » Outreach and engagement plans need to be detailed enough to determine their likelihood of success.

Question	Rubric	Minimum Score Required	Total Possible Score
C: Community Engagement Plan			
ALL PROJECT TYPES			
7. Describe your plans for community involvement. In your narrative please include:			
a) What is your team's experience with outreach and engagement in low income and environmental justice communities.	3 = Significant experience 2 = Some experience 1 = No experience		3
b) Which types of community organization will you seek to partner with?	3 = Specific organizations identified 2 = Organization types identified 1 = No organizations identified		3
c) Describe what efforts have been taken to date to conduct community outreach, education, and recruitment.	4 = Extensive effort 3 = Moderate effort 2 = Some effort 1 = None		4
d) What methods of outreach and engagement will you use to reach participants?	8 = High probability of meeting requirements 6 = Moderate probability of meeting requirements 4 = Low probability of meeting requirements 2 = No methods identified	6	8
8. What kinds of marketing materials and methods will be used? How will these differ by community?	2 = Known plan 1 = Unknown plan		2



7. Is it appropriate to weight the future engagement plan higher than past experience?
8. Is the probability of meeting requirements an appropriate measurement for the required responses?

Community Engagement for Community Solar

- » Additional requirements for community solar will detail communities for subscriber acquisition and project siting.
- » Both siting and subscriber communities should generally be known at registration.
- » An estimate of the ratio low-income subscribers to general market should be known.
- » Understanding the role of community organizations in community solar development.

Question	Rubric	Minimum Score Required	Total Possible Score
COMMUNITY SOLAR ONLY			
9. Indicate the communities where subscriber customer acquisition will occur (cities, towns, counties, neighborhoods).	3 = Specific idea of communities 2 = General idea of communities 1 = No communities identified	2	3
10. Describe the communities where installations will be sited.	3 = Specific idea of communities 2 = General idea of communities 1 = No communities identified	2	3
11. What methods of outreach and engagement will you use to seek community organization support?	4 = High probability of effectiveness 3 = Moderate probability of effectiveness 2 = Low probability of effectiveness 1 = No methods identified	3	4
12) What role will community organizations play in your solar development?	4 = High probability of effectiveness 3 = Moderate probability of effectiveness 2 = Low probability of effectiveness 1 = No methods identified	3	4
13. What is the intended ratio of qualified low-income subscribers, market rate subscribers and anchor subscribers?	3 = Specific ratio targeted 2 = General range target 1 = No ratio known		3
14. Will your community solar projects target nonprofit/public sector anchors?	YES/NO	NOT SCORED	NOT SCORED



9. What degree of accuracy can vendors project the ratio of low-income subscribers for community solar projects at registration?
10. Are the intended anchor types likely to be known at registration?

Planning for Job Training & Installation

- » For Approved Vendors that provide installation services, we need to know if current staff meet job training criteria.
- » Scores are captured for job training plans in Q16.
- » For Approved Vendors that use subcontractors, we will ask for subcontractor plans in next section.

Question	Rubric	Minimum Score Required	Total Possible Score
D: Job Training Requirements			
15. Will your company provide installation services directly?		NOT SCORED	NOT SCORED
a. [IF YES TO Q15] Does your company currently have on staff graduates from qualified job training programs?	3 = More than one graduate on staff 2 = At least one graduate on staff 1 = No graduates on staff	NOT SCORED	NOT SCORED
b. [IF YES TO Q15] What is your intended ratio of permanent, full-time versus part-time staff of qualified job training graduate hours on project installations? What job titles and functional roles will these hires have?		NOT SCORED	NOT SCORED

Planning for Job Training & Installation

- » Plans for meeting job training requirements are captured and scored whether subcontracting or not.
- » Detailed plans are required for the first three years, as job training requirements graduate increase.
- » A detailed plan is the threshold requirement.

Question	Rubric	Minimum Score Required	Total Possible Score
D: Job Training Requirements			
16. What is your plan to meet the job training requirements?			
a) Year 1 plan (10% of installation hours worked across your project portfolio and at least 1 job trainee on 33% of projects for Distributed Generation)?	5 = A very detailed plan 4 = A detailed plan 3 = A moderately detailed plan 2 = A minimally detailed plan 1 = No specific plan	4	5
b) Year 2 plan (20% of installation hours worked across your project portfolio and at least 1 job trainee on 33% of projects for Distributed Generation)?	5 = A very detailed plan 4 = A detailed plan 3 = A moderately detailed plan 2 = A minimally detailed plan 1 = No specific plan	4	5
c) Year 3 plan (33% of installation hours worked across your project portfolio and at least 1 job trainee on 33% of projects for Distributed Generation)?	5 = A very detailed plan 4 = A detailed plan 3 = A moderately detailed plan 2 = A minimally detailed plan 1 = No specific plan	4	5



11. Is a three year plan for meeting job training requirements realistic at registration?
12. Is it more appropriate to ensure plans are detailed or realistic?

Consumer Protections – Business Models

- » Proposed business models should be shared at registration.
- » No requirements for any specific business model or more than one business model.
- » The level of detail is not specified for the business model. But, level of savings and mechanism for no upfront costs and financing are requested in subsequent questions.

Question	Rubric	Minimum Score Required	Total Possible Score
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 Describe)	2 = At least one business model presented 1 = Unknown	2	2
18. How will business models vary by project type or community?		NOT SCORED	NOT SCORED
19. What is the anticipated level of participant savings for each solar offer?	4 = Greater than 75% 3 = Greater than 60% 2 = 50% 1 = Unknown	2	4
20. What mechanisms will your company use to ensure no upfront costs to participants?	4 = High probability of meeting requirement 3 = Moderate probability of meeting requirement 2 = Low probability of meeting requirement 1 = Unknown	3	4
21. Will financing be provided to program participants? What financial institutions will your company partner with? What are the typical terms of the financing agreements? How will participants qualify?		NOT SCORED	NOT SCORED

Consumer Protections – Financing & Savings

- » Site Suitability Guidelines will be developed and required for Distributed Generation and Nonprofit/Public Sector properties.
- » A Program Resources Guide will be developed to ensure participants have access to the widest network of support and resources.
- » Materials in other languages are encouraged, but not required.

Question	Rubric	Minimum Score Required	Total Possible Score
E: Consumer Protections			
22. Will your company provide marketing and contractual materials in languages other than English?	2 = Yes 1 = No 1 = Unknown		2
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 guidance and resources to property owners interested in	4 = High probability of meeting requirement 3 = Moderate probability of meeting requirement 2 = Low probability of meeting requirement 1 = No specific plan	3	4
24. Please indicate that you've read the Program Resources Guide . How will your company integrate energy efficiency and other program resources into your work?	3 = Moderate or high probability of meeting requirement 2 = Low probability of meeting requirement 1 = No specific plan		3
25. Please describe the tools and methods used for system design and power generation projections.		NOT SCORED	NOT SCORED



13. What is the right level of detail for submitting proposed business models, including savings, no upfront costs and financing terms?
14. Attestations are required for minimum site suitability and for sharing resources with participants. Is this understood and appropriate?

Final Scores

- » Distinct scores are totaled for candidates with and without community solar (because of community solar specific questions).
- » Total minimum score requirements at about 70% of total possible score.
- » An Excel based rubric is available for calculating scores.

SCORING	Minimum Required Score	Total Possible Score
Without Community Solar	45	62
With Community Solar	57	79

Category	Weight	Max Score
Project Types & Communities	10%	8
Community Engagement	25%	20
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Job Training Requirements	19%	15
Consumer Protections	24%	19



15. Is the minimum score requirement of at least 70% appropriate considering the rubric?



Next Steps

Stakeholder Feedback Timeline

Stakeholder Engagement Sessions November, 2018 – February, 2019

Program Milestones

Stakeholder Engagement Overview
November 2018

Approved Vendor Registration
December 2018

Project Application Process
January 2019

Grassroots Education
December 2018

Environmental Justice
January 2019

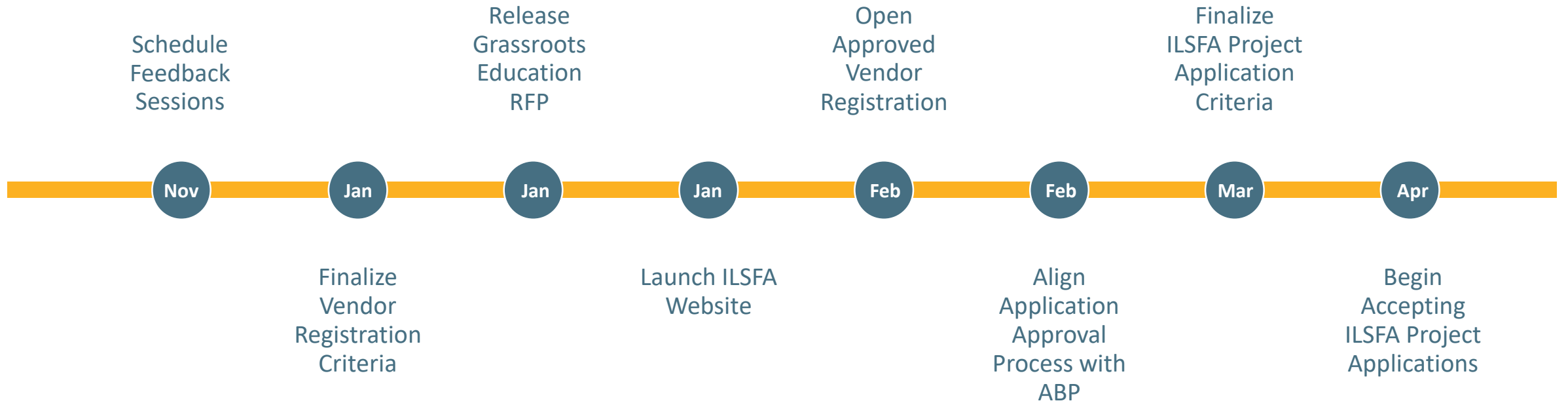
Evaluation Criteria
February 2019

Development Launch
October 2018

Vendor Registration Opens
February 2019

Program Launch
April 2019

Next Steps



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