



**Illinois Solar for All**

# Helpful Pointers for New Approved Vendors/Refresher PY4

June 4, 2021

# Agenda

- Team introductions and PY4 calendar
- Helpful Tips
- Points of Clarification/FAQ
  - Proof of site ownership (eligible documentation)
  - ComEd vs. Ameren interconnection approval
  - Savings requirements
  - Marketing requirements
  - Critical service provider (what is it and how to apply)
  - Documentation consistency
  - Utility bills
- Project selection refresher
- Q&A



# Introduction and Program Overview



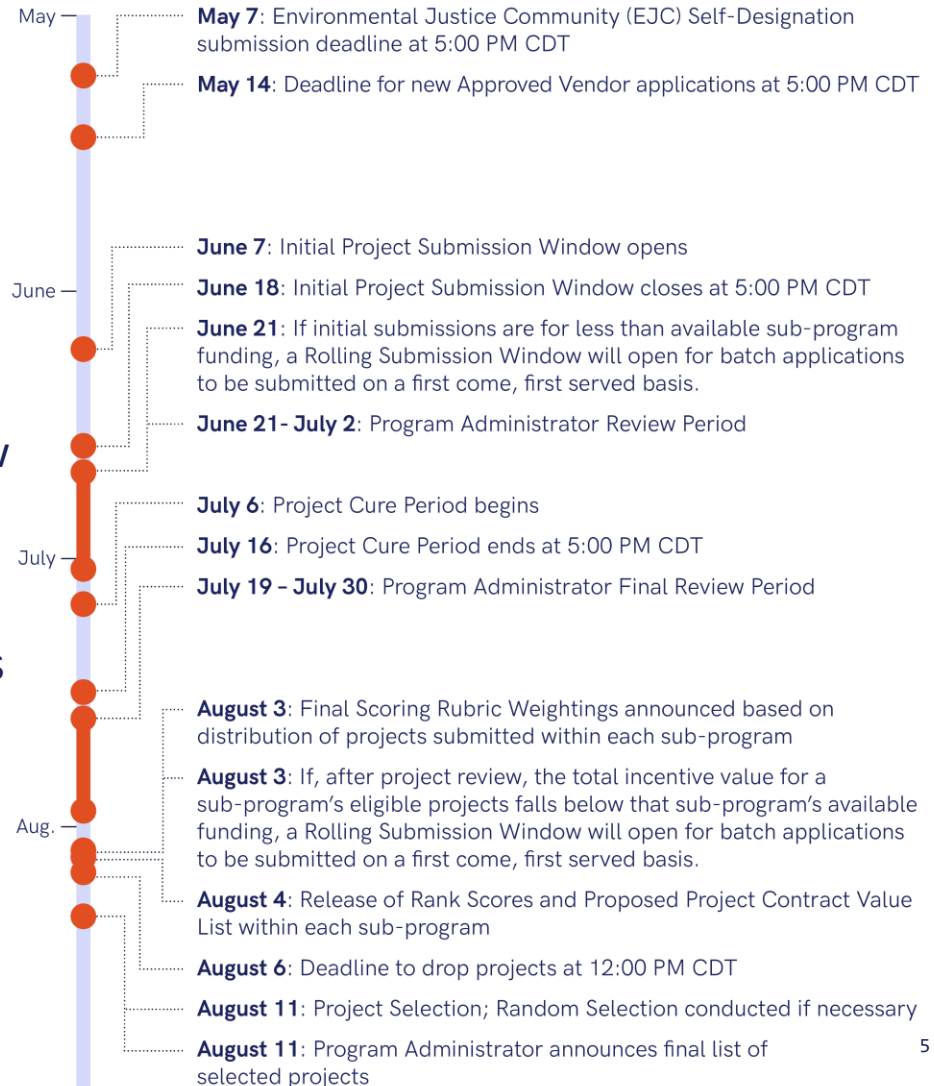
# ILSFA Program Team Introductions

- Program Management
  - Laura Oakleaf
  - Joanna Racho
- Grassroots Education
  - Eli Corrado
- Job Training
  - Lauren Friedman, GRID Alternatives
- Income Verification
  - Kelly Shelton, Shelton Solutions
- Vendor Management and Project Review
  - Jan Gudell
  - Tim Crowder
  - Brandon House
  - Lucas Kappel
  - Tim Heppner

# 2021-2022 Program Year (PY4): 2 Submission Windows

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

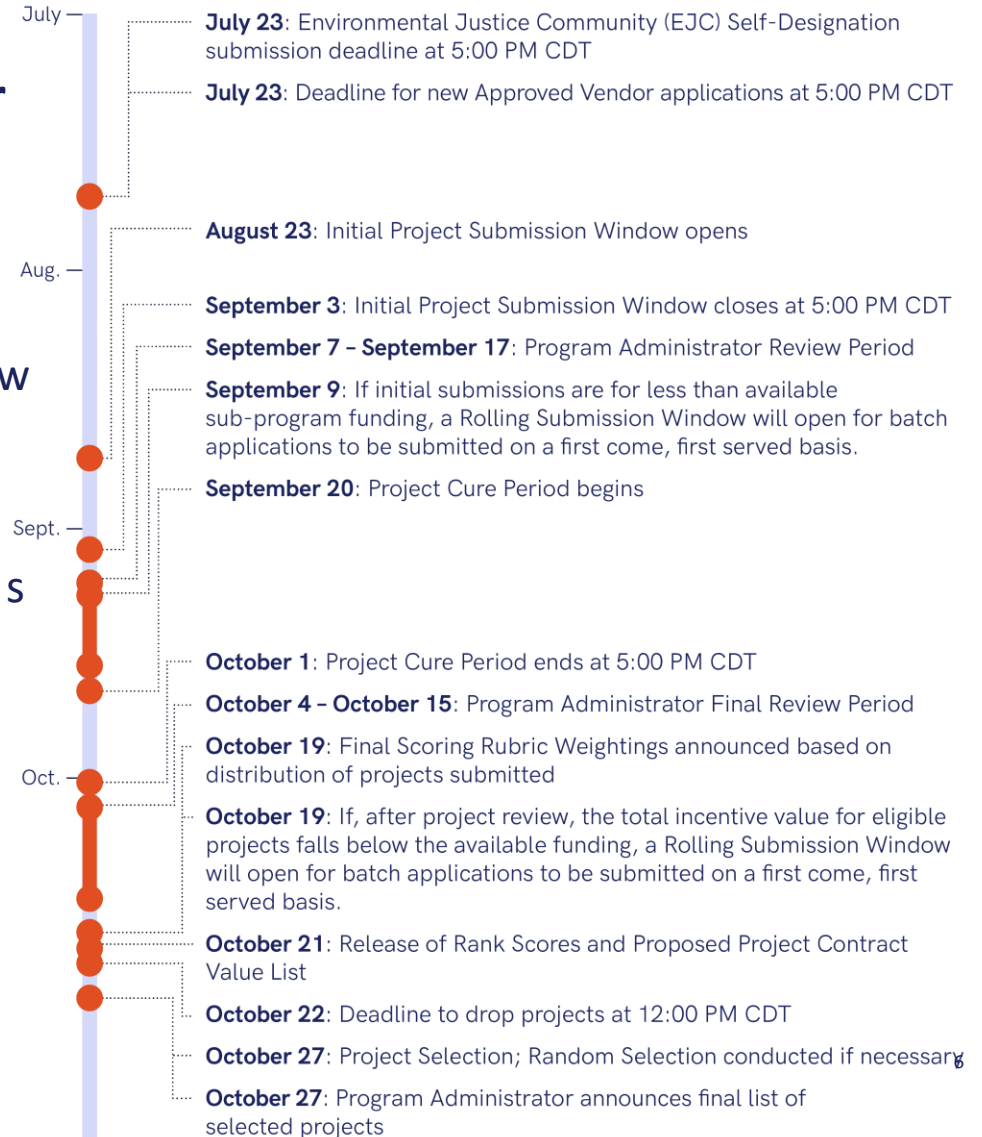
- June 7- June 18 @ 5pm  
Initial project submission window is open
- June 21  
Rolling submission window opens
- August 11  
Project selection



# 2021-2022 Program Year (PY4): 2 Submission Windows

## Low-Income Community Solar sub-program:

- August 23 – September 3 @ 5pm  
Initial project submission window is open
- September 9  
Rolling submission window opens
- October 27  
Project selection



# Helpful Resources



# Screening Tools - Environmental Justice Communities and Low-Income Census Tracts

Illinois Solar for All  
Communities in Illinois with more than 50% ILSFA income eligible households

Census tracts where at least half of the households earn an income of 80% or less of the Area Median Income qualify as income eligible.

Search tool

Search for an address or locate on map

Esri World Geocoder

Set location

Search result  
1 of 1

Search for an address or locate on map

4900 W Huron St, Chicago, IL, 60618

2019 Income Eligible Census Tracts

Geoid	17031251600
Total households	1,013
Tract median income	33,189
Income qualification	This address qualifies



# Savings Calculator

- Can be found on the ILSFA website
  - For Vendors->Current Approved Vendors->Eligibility Tools and Forms
- [Savings Calculator – Non-Profit Organizations and Public Facilities](#)
- [Savings Calculator – Distributed Generation](#)
- Types of disclosures
  - PPA
  - Lease
  - System Purchase
  - Non-Profit Public Facilities

# File Naming Convention and File sizes

- All files that are uploaded in the Vendor Portal should be named
  - Filename structure:  
[Project#]\_Document\_Name\_YYYY\_MM\_DD
  - e.g. P-0001\_System\_Design\_2021\_06\_04
- The maximum file size is 25mb
  - Use an online tool to reduce or compress the document size

# Disclosure Types

- NP only available as PDF
  - Can be found at the bottom of the Vendor Portal home screen
- DG online
  - Must be completed in the vendor portal
- CS online
  - Must be completed in the vendor portal
  - Can use in house tool with prior approval from Program Administrator



## Eligibility Tools

1. Income Eligibility Chart (by county)
2. Qualified Low-Income Community Map
3. Environmental Justice Community Map
4. Savings Calculator - Non-Profit Organizations and Public Facilities
5. HUD Qualified Census Tracts

## Disclosure Forms

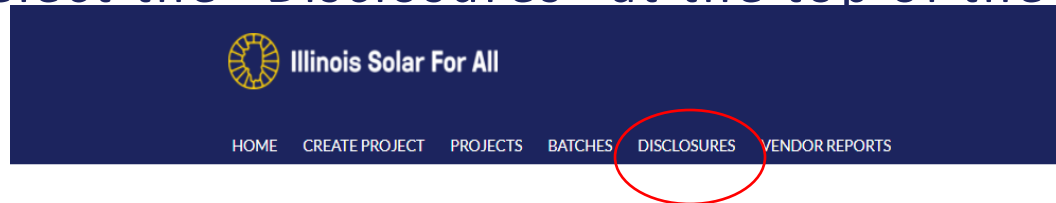
1. Non-profit and Public Facility Disclosure Form
2. Residential Disclosure Lease Form
3. Residential Disclosure Lease (Spanish)
4. Residential Disclosure PPA Form
5. Residential Disclosure PPA (Spanish)
6. Residential Disclosure Purchase Form

## Household Basic Information Forms

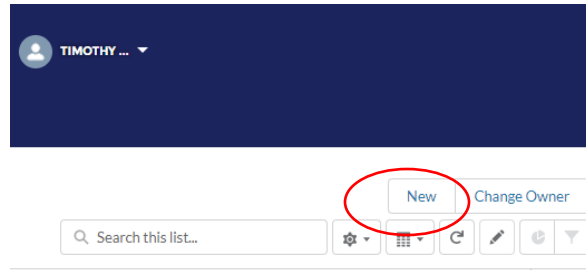
1. Distributed Generation (not located in HUD-QCTs)
2. Community Solar (not located in HUD-QCTs)
3. Distributed Generation - Whole Building
4. Community Solar (located in HUD-QCTs)
5. Non-profit and Public Facilities
6. Whole Building Certification and Consent form

# Creating DG/CS Disclosures in the Vendor Portal

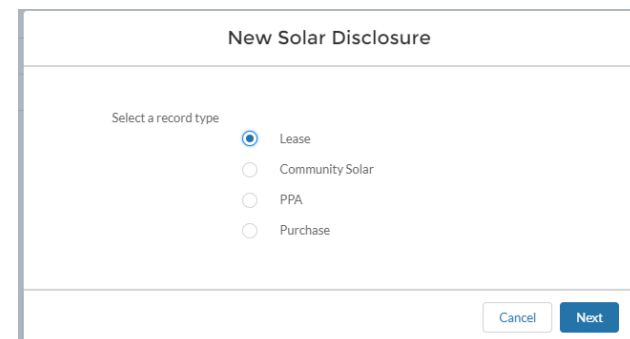
- Select the “Disclosures” at the top of the page



- Select “New” on the right



- A pop up will open where you can select the type of disclosure you would like to create

A screenshot of a pop-up form titled 'New Solar Disclosure'. The form has a white background and a thin border. It contains the text 'Select a record type' followed by four radio button options: 'Lease' (which is selected), 'Community Solar', 'PPA', and 'Purchase'. At the bottom right of the form are two buttons: 'Cancel' and 'Next'.

# Recent Portal Changes

- System Design is now one document to upload on the Part I Form



The screenshot shows a web form for uploading a System Design document. At the top, it says "System Design" with a horizontal line. Below that, the text "System Design" is repeated. There is a file selection area with a "Choose File" button and the text "No file chosen". Below the file selection area, there is a paragraph of text: "The maximum file size for upload is 25mb. System Design is comprised of Site Plan, Shading Analysis, One Line Diagram and UL listing of Mounting System Equipment." At the bottom right of the form, there is a blue hyperlink that says "File too big? Click here to add an additional upload."

- Recipient Verification (RV) you can now either create a new RV or adding an existing RV
  - Creating a new RV is used when the AV has acquired and done the income verification for the potential participant
  - Adding an existing RV is used when Elevate has done income verification and has given the participant a Recipient Verification Number (example: RP-12345)



# ILSFA Project Life Cycle



# Approved Vendor Manual

1. Introduction
2. Sub-programs Overview
3. Approved Vendor Requirements and Registration
4. Project and Participant Eligibility
5. Participant Savings Requirements
6. Project and Participant Verification
7. Marketing and Consumer Protection Requirements
8. Project Submission Processes
9. Project Selection and Prioritization
10. System Requirements
11. Renewable Energy Credit Management
12. Annual Reports and System Performance Evaluation
13. Invoicing and Payments
14. Inspections
15. Job Training Requirements and Verification
16. Complaint Management
17. Confidentiality
18. Vendor Manual Updates
19. Appendix

[Link to Approved Vendor Manual](#)



# FAQ and Points of Clarification





# Proof of Site Ownership

**NOT AN OFFICIAL DOCUMENT**

41040402G  
 Warranty Deed (1/2)  
 Statutory (ILLINOIS)  
 (Individual to Individual)

Doc#: 1827006186 Fee: \$50.00  
 Karen A. Yarbrough  
 Cook County Recorder of Deeds  
 Date: 09/27/2018 12:43 PM Pg: 1 of 2  
 Dec ID 20180901680577  
 ST/CO Stamp 1-409-091-744 ST Tax \$210.00 CO Tax \$105.00

GIT

Above Space for Recorder's Use Only.

THE GRANTOR(S) [REDACTED] AND [REDACTED], husband and wife

of the Woodlands, State of Texas for the consideration of \$10.00 DOLLARS, and other good and valuable considerations in hand paid, CONVEY(S) and WARRANT(S) to

(NAMES AND ADDRESS OF GRANTEE(S))

[REDACTED] individually  
 [REDACTED] Bonfield St, Chicago IL 60608

all interest in the following described Real Estate situated in Cook County, Illinois, commonly known as 3712 [REDACTED] Cicero, IL 60804 legally described as:

LOT 453 IN THIRD AUSTIN BOULEVARD ADDITION TO BOULEVARD MANOR, BEING A SUBDIVISION OF THE SOUTHWEST 1/4 OF THE SOUTHEAST 1/4 OF SECTION 32, TOWNSHIP 39 NORTH, RANGE 13, EAST OF THE THIRD PRINCIPAL MERIDIAN, IN COOK COUNTY, ILLINOIS.

hereby releasing and waiving all rights under and by virtue of the Homestead Exemption Laws of the State of Illinois. TO HAVE AND TO HOLD said premises forever.

SUBJECT TO: Covenants, conditions and restrictions of record, Private, public and utility easements and roads and highways, General taxes for the year 2018 and subsequent.

Permanent Index Number (PIN) [REDACTED]-417-024-0000  
 Address(es) of Real Estate [REDACTED] Cicero, IL 60804

Dated this 23<sup>rd</sup> day of August, 2018

**NOT AN OFFICIAL DOCUMENT**

Illinois Anti-Predatory Lending Database Program

Doc# 20180901680577  
 Karen A. Yarbrough  
 Cook County Recorder of Deeds  
 Date: 09/27/2018 12:43 PM Pg: 1 of 2

Certificate of Exemption



Report Mortgage Fraud  
 844-768-1713

The property identified as: PIN: 4455-124-007-0000  
 Address: [REDACTED]  
 Street: [REDACTED] Justice Street  
 Street line 2:  
 City: [REDACTED] State: IL ZIP Code: 60521

Lender: Royal Business Bank  
 Borrower: [REDACTED] and [REDACTED]

Loan / Mortgage Amount: \$385,000.00

This property is located within the program area and the transaction is exempt from the requirements of 765 ILCS 77/2 et seq. because the application was taken by an exempt entity.

Old Republic Title  
 5601 Southeast Highway  
 Oak Lawn, IL 60453  
 201 V5304 1/1

Certificate number: EDC84BEE-1A5E-437E-2B1E-0A07A2D7F8C9 Execution date: 5/27/2020



# ComEd and Ameren Interconnection Approval

## Article 11. Signatures

IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed by their respective duly authorized representatives.

### For the Interconnection Customer: -



Name: ██████████

Title: Partner

Date: June 11, 2019

### For EDC:

Name: *Elizabeth Barrows*


Title: *Sr. Distribution Design Specialist*

Date: *06/14/2019*

## Article 11. Signatures

IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed by their respective duly authorized representatives.

### For the Interconnection Customer:

DocuSigned by:  
  
A4D4186E8D714B5

Name: ██████████

Title: *Senior Designer*

20

velope ID: 9DC40031-6E00-4A75-AEFF-44F1789A2C7A

Project Number: ██████████

37.5 kW

Date: 7/16/2020

### For EDC:

Name: Ernesto Deloera

*Ernesto Deloera*

Title: DER Interconnection Specialist

Date: 07/16/2020



# Savings Requirements

- Review Section 5 of Vendor Manual
- Savings must be at least 50% first year and over contract term
  - First year savings example:
    - Total costs:  $6,500 \text{ kWh} \times \$0.05 = \$325.00$
    - Total Energy Value:  $6,500 \text{ kWh} \times \$0.12484 = \$811.46$
    - Total Savings Dollars =  $\$811.46 - \$325.00 = \$486.46$
    - Total Savings %:  $\$486.46 \div \$811.46 = 59.95\%$
- NP/PF projects that utilize ITC must meet 65% savings requirement first year and over contract term



# Documentation consistency

- AC and DC kW system sizes, module and inverter count and ratings, and kWh production are consistent across:
  - Arrays entered in Vendor Portal
  - Customer disclosure form
  - Customer contract
  - One line diagram
  - Shading study (Helioscope, Aurora, PVSyst, etc)

# Utility Bills

- Used in determining net metering rate
- For Non-profit/Public Facility projects, Alternative Retail Electric Supplier and hourly pricing customers please obtain average \$/kWh rate from 12 months of customer bills
- For new service without full year of usage history, use rate of new service and estimate load from facility's architect/engineer.
- The more recent the bills, the better = more accurate



# Project Selection Refresher



# Goals of Project Selection Protocol

- Provides a process for when more eligible projects are submitted than can be funded
- Supported by Public Act 99-0906/Revised Plan
- Prioritizes projects with attributes that highlight the spirit of Public Act 99-0906/Revised Plan
- Increases the likelihood for a diversity of projects by size and location
- Minimizes the number of projects randomly selected



# Project Selection Process

Key steps if project selection is necessary

- Step 1: Eligibility Letters are sent for each eligible project. Review these letters closely - Project Selection scores are based on these data points.
- Step 2: Scoring Rubric is announced – this shows the # of points for weighted categories (such as system size)
- Step 3: AVs may withdraw projects
- Step 4: Project Selection meeting
- Step 5: Resizing decisions





# Q & A



# Contact Information

## ILSFA Program Manager:

Laura Oakleaf

[Laura.Oakleaf@elevatenp.org](mailto:Laura.Oakleaf@elevatenp.org)

773-906-5134

## Job Training Requirements:

Lauren Friedman

[lfriedman@gridalternatives.org](mailto:lfriedman@gridalternatives.org)

510-210-8386

## ILSFA Marketing:

Hannah Magnuson

[Hannah.Magnuson@elevatenp.org](mailto:Hannah.Magnuson@elevatenp.org)

773-269-2223

## ILSFA Vendor Management Team:

[vendors@IllinoisSFA.com](mailto:vendors@IllinoisSFA.com)

- Jan Gudell
- Timothy Crowder
- Brandon House

