## 

## **Illinois Solar for All Approved Vendor Registration Template:**

## Approved Vendor Type: Aggregator Designee

This template can be used to prepare a response to the Illinois Solar for All Approved Vendor registration questionnaire to include as a single upload when registering at [Illinoissfa.com](http://www.illinoissfa.com/). Each Approved Vendor type will use a template specific to that Approved Vendor type. Applicants should be sure they are using the correct template for their registration type and should review the Illinois Solar for All Approved Vendor Manual prior to completing this form.

## **Approved Vendor Requirements and Registration**

The Illinois Solar for All Approved Vendor registration process can be initiated from the online form at [Illinoissfa.com](http://www.illinoissfa.com/). Responses to required questions can be submitted online individually or via this form template. Whether completing individual registration questions online or via this template, both options are initiated at the online registration form page.

Before beginning the registration process, the applicant should download and read the Approved Vendor Manual, which provides guidance on the scope of the program and the requirements necessary to complete this registration process. It is highly recommended that the process outlined below be followed by all applicants.

1. Download and read the manual
2. Aggregator Designees **do not** need to register with the Adjustable Block Program
3. Prepare your responses
4. Submit responses
5. Sign attestations (e-signature)
6. Program Administrator evaluation
7. Assessment and revisions as needed
8. Program Administrator will attempt to return an approval determination within 14 business days

This registration form requires the completion of a series of questions that differs based on the Approved Vendor type selected by the applicant. This template corresponds to questions for the **Aggregator Designee**. Applicants will be able to upload supporting documents at the end of the process. All applicants will be required to e-sign terms and conditions specific to their Approved Vendor type as part of this process.

If applicants have questions about this process or technical issues with this site, please refer to the Approved Vendor Manual or contact the Program Administrator at [vendors@Illinoissfa.com](mailto:info@Illinoissfa.com).

### Section A: Registration Type

Please indicate which registration type this application represents.

[ASKED OF ALL APPLICANTS]

Approved Vendor

Aggregator

Aggregator Designee

Explanation: The response to this question informs the Program Administrator of the role your organization intends to play in the Illinois Solar For All Program. See the definitions in the Illinois Solar for All Program Manual.

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| Rubric: | NOT SCORED |

### Section B: Pre-Requisite: Adjustable Block Program Qualification

**Question 1.** NOT ASKED OF AGGREGATOR DESIGNEES

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### Section C: Project Types and Communities

**Question 2:** List the project types(s) you intend to pursue.

CHECK ALL THAT APPLY

Low-income Distributed Generation: 1-4 unit buildings

Low-income Distributed Generation: 5+ unit buildings

Non-profit and Public Facilities

Low-income Community Solar

Explanation: Select each project type your organization plans to develop. There are no specific requirements for Approved Vendors to develop multiple project types or to work within different market segments. Not selecting a project type at registration does not preclude an Approved Vendor from submitting projects in the different incentive categories.

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| Rubric: | NOT SCORED |

**Question 3:** What utility services territories will you work within?

CHECK ALL THAT APPLY

Ameren Illinois

ComEd

Mid-American

Mt. Carmel

Municipal utilities

Rural electric cooperatives

Explanation: Select each utility territory within which your firm plans to support solar development for Illinois Solar for All projects.

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| Rubric: | NOT SCORED |

**Question 4**. Describe the anticipated volume in total capacity (kW AC) annually for Illinois Solar for All projects.

[NARRATIVE TEXT]

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Explanation: This is collected for informational purposes only.

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| Rubric: | NOT SCORED |

**Question 5:**NOT ASKED FOR APPROVED VENDORS

**Question 6.** Describe the communities where solar developments will occur (cities, towns, counties, neighborhoods).

[NARRATIVE TEXT]

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Explanation: 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, towns or cities, as well as neighborhoods/communities. Providing no specific locations will receive the lowest score, while providing more detailed and specific locations will receive the highest score.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 3 = Communities have been identified in detail  2 = Communities have been identified  1 = Communities have not yet been determined | 3 | 2 |

**Question 7.**Will project types differ by community?

Yes

No

Explanation: The response is for informational purposes only and is unscored.

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| Rubric: | NOT SCORED |

**Question 8.** Will projects be sited in Environmental Justice (“EJ”) Communities? What percentage of projects will be in EJ communities?

[ENTER A PERCENTAGE VALUE, AS WELL AS A NARRATIVE RESPONSE DESCRIBING THE APPROACH]

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Explanation: Illinois Solar 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 look-up tool will be provided that allows users to search any address in the state to determine whether or not it resides in a qualified EJ community.

Please provide your organization's intent on serving environmental justice communities to support the program carve out of 25% of all incentives serving these 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 do you anticipate being within these qualified communities? Has your organization identified specific EJ communities you will work in? If so, which communities?

While there will be no requirements to meet this target, metrics will be tracked and reported regularly.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 5 =More than 50% of all projects will be sited in EJ communities  4 = Between 25% and 50% of all projects will be sited in EJ communities  3 = Between 0% and 25% of all projects will be sited in EJ communities  2 = Unknown at this time  1 = EJ communities will not be targeted | 5 | NONE |

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### Section D: Community Engagement Plan

**Question 9.** Describe your plans for community involvement. In your narrative please include:

**Question 9a.**What is your team’s experience with outreach and engagement in low income and environmental justice communities?

[NARRATIVE TEXT]

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Explanation: Please describe your organization's experience with outreach and engagement in low-income or environmental justice communities inside or outside of Illinois. What methods of marketing, outreach, and engagement were used?

If your organization has limited or no experience serving these communities, are there individuals within your organization that have prior experience conducting marketing, outreach, and engagement in low-income or environmental justice communities? Energy-related experience outside of solar development in these communities is pertinent to this question.

Specific experience is not required for Illinois Solar for All. Greater experience (number of years, number of communities, various methods) by the organization and/or individuals will receive higher scores. There are no minimum required points for this question.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 5 = Extensive experience  3 = Moderate experience  1 = Minimal experience  0 = No experience | 5 | NONE |

**Question 9b.**With which community organizations or types of community organizations will you seek to partner?

[NARRATIVE TEXT]

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Explanation: While only the low-income community solar program has specific requirements for engaging community organizations as outlined in Section 8.6.2 of the Long-Term Renewable Resources 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 engagement, outreach, and marketing across programs. What types of organizations do you anticipate engaging? What specific organizations do you anticipate engaging? While there are no minimum requirements to satisfy this response, a list of organization types will gain a moderate score, while a list of specific organizations will yield a higher score. Presenting no organization information will yield the lowest score.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 5 = Specific organizations identified  3 = Organization types identified  0 = No organizations identified | 5 | NONE |

**Question 9c.**Please provide a narrative summary of efforts taken prior to registration to conduct community outreach, education, and recruitment.

[NARRATIVE TEXT]

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Explanation: Please describe what efforts have been undertaken to date by your organization to conduct outreach, education, or community engagement for Illinois Solar for All. As stated in the [Long-Term Renewable Resources Procurement Plan](https://www2.illinois.gov/sites/ipa/Documents/2019ProcurementPlan/Long%20Term%20Renewable%20Resources%20Procurement%20Plan%20%288-6-18%29.pdf), Approved Vendors are required to have undertaken some effort prior to registration. Responses that demonstrate meaningful involvement of low-income community members and specific efforts taken 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. Greater levels of effort will receive higher scores.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 6 = Extensive effort  4 = Moderate effort  2 = Minimal effort  0 = No effort | 6 | 4 |

**Question 9d.**What methods of outreach and engagement will you use to reach participants?

[NARRATIVE TEXT]

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Explanation: While specific engagement experience or activities to date are not required to register to be an Illinois Solar for All Approved Vendor, having an outreach and engagement plan is deemed an important part of predicting success. Please describe your organization's strategy for conducting marketing, outreach, and engagement. What tactics will be used to develop marketing materials, conduct marketing, engage communities, and acquire customers? How will your strategy in these communities differ from a general market strategy? Plans that include both strategic and tactical goals, as well as short and long terms goals have a higher probability of success and will receive a higher score.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 6 = High probability of meeting requirements  4 = Low probability of meeting requirements  2 = No methods identified | 6 | 4 |

**Question 10.**What kinds of marketing materials and methods will be used? How will these differ by community?

[NARRATIVE TEXT]

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Explanation: Please describe your organization's specific plans for developing marketing materials, strategies, and tactics for low-income and environmental justice communities. Plans with greater detail will be scored higher.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 4 = Good level of detail  3 =  2 =  1 = Minimal level of detail | 4 | NONE |

### Section E: Community Solar

**Question 11.**Indicate the communities where subscriber customer acquisition will occur (cities, towns, counties, neighborhoods).

[ASKED IF COMMUNITY SOLAR IS SELECTED]

[NARRATIVE TEXT]

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Explanation: Please indicate the communities where community solar subscribers will be targeted. Customer acquisition at registration is not required for Illinois Solar for All. But, to the extent you are aware, the communities you will target should be listed. More specificity will yield a higher score.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 3 = Specific idea of communities  2 = General idea of communities  1 = No communities identified | 3 | 2 |

**Question 12.**Indicate the communities where installations will be sited.

[ASKED IF COMMUNITY SOLAR IS SELECTED]

[NARRATIVE TEXT]

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Explanation: Please indicate the communities where community solar installations will be sited. Specific sites are not required for Illinois Solar for All registration but, to the extent you are aware, the communities you will target should be listed. More specificity will yield a higher score.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 3 = Specific idea of communities  2 = General idea of communities  1 = No communities identified | 3 | 2 |

**Question 13.**What methods of outreach and engagement will you use to seek community organization support?

[ASKED IF COMMUNITY SOLAR IS SELECTED]

[NARRATIVE TEXT]

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Explanation: Section 8.6.2 of the [Long-Term Renewable Resources Procurement Plan](https://www2.illinois.gov/sites/ipa/Documents/2019ProcurementPlan/Long%20Term%20Renewable%20Resources%20Procurement%20Plan%20%288-6-18%29.pdf) indicates specific requirements for engaging community stakeholders or community-based organizations in the development of low-income community solar projects. Requirements for projects include demonstrating the location, development, and participation of stakeholders, but also showing how the partnership is responsive to the priorities and concerns of low‐income members of the community. What methods of outreach will your organization use to engage these community-based organizations to achieve this level of participation? Descriptions that indicate how individuals will be targeted and engaged, what role community organizations will have in siting, subscriber model development, and how the organization will be leveraged will have a greater probability of meeting these requirements.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 6 = High probability of effectiveness  4 = Moderate probability of effectiveness  2 = Low probability of effectiveness  0 = No methods identified | 6 | 4 |

**Question 14.**What role will community organizations play in your solar development?

[ASKED IF COMMUNITY SOLAR IS SELECTED]

[NARRATIVE TEXT]

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Explanation: While project level requirements for engaging community organizations are specific only to community solar, community organizations can play a key role in building awareness, trust, and a customer base. Please describe the role community organizations will play in your organization's solar development. How will this differ by community or project type? Plans with specific goals for community organizations or organization types and how they will help with marketing, building awareness, or even customer acquisition has a greater probability of being effective. There are no requirements for how detailed or long term your plan is, but the plan should be thoughtful and detailed to have a moderate probability of being effective.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 6 = High probability of effectiveness  4 = Moderate probability of effectiveness  2 = Low probability of effectiveness  0 = No methods identified | 6 | 4 |

**Question 15.**What is the anticipated total system capacity for community solar projects as measured by maximum continuous AC, and what is the intended ratio of anchor subscriber share to qualified low-income subscribers share?

[ASKED IF COMMUNITY SOLAR IS SELECTED]

[NARRATIVE TEXT]

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Explanation: While there are no specific requirements for the ratio 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 a higher score.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 3 = Specific ratio targeted  2 = General range targeted  1 = No ratio targeted | 3 | NONE |

**Question 16.**Will your community solar projects target Non-profit or Public facilities anchors?

[ASKED IF COMMUNITY SOLAR IS SELECTED]

Yes

No

Explanation: This is collected for informational purposes only.

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| Rubric: | NOT SCORED |

### Section F: Job Training Requirements

**Question 17.**Please describe your plan to meet the job training requirements for Illinois Solar for All. Describe your plan to ensure that in year one of program participation at least 10% of hours worked across your project portfolio are performed by qualified job training program graduates, in year two 20%, and in year three 33%. If you have indicated your participation in the low-income distributed generation incentive category, please include your plans for ensuring that a qualified job trainee will be included in at least 33% of projects.

[NARRATIVE TEXT]

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Explanation: Please indicate your plan for meeting the job training requirements in the first through the third years of participation. If your organization will subcontract installation, please indicate how you will meet these requirements using subcontractors. Details should include anticipated number of staff onsite for various project types, the roles they will play and how that will change over time.

It is recognized that these hiring plans may not be realized according to the details expressed here because of the potential for changing market conditions or the availability of qualified candidates. However, the plan presented must express a clear understanding of the requirements, a good level of detail, and a moderate probability of being successful.

Public comments on job training requirements will be accepted through February 7, 2019, and, therefore are subject to change.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 12 = Significant detail and/or probability of success  7 = Moderate detail and/or probability of success  1 = Minimal detail and/or probability of success | 12 | 7 |

**Question 18.**Will your company provide installation services directly?

Yes

No

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| Rubric: | NOT SCORED |

**Question 18a.**Does your company currently have on staff graduates from qualified job training programs?

[ANSWER IF YES TO Q18]

Yes

No

Explanation: Qualified job training programs will be listed on the ILSFA website. These include job training programs funded by the [Future Energy Jobs Act](https://www.icc.illinois.gov/downloads/public/edocket/451215.pdf), as well as other programs that provide training that leads to the Qualified Person designation under the [Part 461 ICC rule](http://www.ilga.gov/commission/jcar/admincode/083/083004610000100R.html). If your organization will conduct the installation, please indicate the number of qualified trainees you currently have on staff. While this response will not be scored, this information will be an important part of your plans for meeting job training requirements as required in Q16.

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| Rubric: | NOT SCORED |

**Question 18b.**  Will the qualified job trainees you use on your projects be full-time staff or part-time employees? What job titles and functional roles will these hires have?

* Please provide a percentage and a narrative description

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| Rubric: | NOT SCORED |

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### Section G: Consumer Protections

**Question 19a.** Which of the following business models will your company offer for distributed generation projects?

[ANSWER IF YES TO LOW-INCOME DISTRIBUTED GENERATION PROJECTS]

System ownership

System lease

Power purchase agreement

Other (Please describe)

Explanation: There are no requirements for having multiple business model offers to register for Illinois Solar for All. However, it is necessary to know you will offer at least one business model. "Business model" refers to ownership and energy purchase structure; i.e. customer-owned system, leased, or power purchase agreement (“PPA”), as well as any other non-traditional model. Please indicate whether the model applies to distributed generation projects.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 2 = At least one business model presented  1 = Unknown | 2 | 2 |

**Question 19b.** Which of the following business models will your company offer for community solar?

[ANSWER IF YES TO LOW-INCOME COMMUNITY SOLAR PROJECTS]

System ownership

System lease

Power purchase agreement

Other (Please describe)

Explanation: There are no requirements for having multiple business model offers to register for Illinois Solar for All. However, it is necessary to know you will offer at least one business model. "Business model" refers to ownership and energy purchase structure; i.e. customer-owned system, leased, or PPA, as well as any other non-traditional model. Please indicate whether the model applies to community solar projects.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 2 = At least one business model presented  1 = Unknown | 2 | 2 |

**Question 20.** How will business models vary by project type or community?

[NARRATIVE TEXT]

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Explanation: This is collected for informational purposes only.

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| Rubric: | NOT SCORED |

**Question 21**.   What is the anticipated level of participant savings for each solar offer?

[NARRATIVE TEXT]

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Explanation: Illinois Solar for All requires that any annual payments by program participants be less than 50% of the annual first year estimated production and/or utility default service net metering value to be received by the customer. Business models that are anticipated to pass on a greater level of savings than 50% will yield higher points at registration. While there will be no requirements to meet this target, other than the 50% minimum, metrics will be tracked and reported regularly.

**Annual Customer Payment ÷ 1st Year Net Metering Value < 0.5**

Savings is calculated by dividing the total cost and fees charged to a customer by the value of the energy produced by the system in the first year (all on an annual basis), and then subtracting that fraction from 100%.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 4 = Greater than 75%  3 = Greater than 60%  2 = Greater than 50%  1 = Unknown | 4 | 2 |

**Question 22**.   What mechanisms will your company use to ensure no upfront costs to participants?

[NARRATIVE TEXT]

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Explanation: The requirement that program participants see no upfront costs can be met in a number of ways, by business and ownership structures, financing or creative payment structures. With the requirement that property liens cannot be used and a greater population of unbanked or credit-stressed households, financing options can be limited. Please indicate your organization's plan for mitigating these barriers and meeting this requirement. Plans that address the known risks and barriers with specific solutions have a greater probability of meeting this requirement.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 3 = High probability of meeting requirement  2 = Moderate probability of meeting requirement  1 = Low probability of meeting requirement | 3 | 2 |

**Question 23**.   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?

[NARRATIVE TEXT]

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Explanation: This is collected for informational purposes only.

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| Rubric: | NOT SCORED |

**Question 24**.   Will your company provide marketing and contractual materials in languages other than English?

Yes

No

Explanation: Contracts and marketing materials must be presented in the language requested by the customer.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 2 = Yes  1 = No or Unknown | 2 | NONE |

**Question 25**. 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 hosting onsite distributed generation but whose properties do not pass Site Suitability criteria?

[NARRATIVE TEXT]

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Explanation: ILSFA has a specific requirement for Approved Vendors to ensure rooftop solar projects are installed on properties with a minimum level of structural, electrical, and health and safety integrity. 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 properties meet these requirements. Greater detail in indicating how staff or subcontractors will be trained, collect data, and report assessments will receive a higher score.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 4 = High probability of meeting requirement  3 = Moderate probability of meeting requirement  2 = Low probability of meeting requirement  1 = No specific plan | 4 | 3 |

**Question 26**. Please describe the tools and methods you anticipate using for system design and power generation projections.

[NARRATIVE TEXT]

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Explanation: This is collected for informational purposes only.

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| Rubric: | NOT SCORED |

**Question 27**. The Program Administrator will provide a current list of resources for program participants, include available energy and housing assistance programs, incentives and grants, as well as financing programs and other relevant resources. How will the Approved Vendor ensure that information and opportunities to utilize these resources are offered to participants where applicable?

[NARRATIVE TEXT]

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Explanation: ILSFA has a specific requirement that resources be provided to property owners, including available energy and housing assistance programs, incentives and grants, as well as financing programs and other relevant resources. 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 information shared will have a greater probability of meeting the requirement.

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| Rubric: | Max Possible Score: | Min. Score Required: |
| 4 = High probability of meeting requirement  3 = Moderate probability of meeting requirement  2 = Low probability of meeting requirement  1 = No specific plan | 4 | N/A |

## Completing Your Registration

The Approved Vendor must upload this completed form as part of the registration process initiated at [Illinoissfa.com](http://www.illinoissfa.com/). The online registration process is initiated at the registration page. Initial business and contact details must be entered online, as well as other key information before uploading this document. Once uploaded, the applicant will continue to the Approved Vendor attestations and must provide an e-signature to complete the registration submission.

For questions on the use of this form or on the Illinois Solar for All Approved Vendor registration process, please contact: [vendors@Illinoissfa.com](mailto:vendors@Illinoissfa.com).