

# Illinois Solar for All Approved Vendor Registration Form and Attestations:

## Approved Vendor Type:

### Aggregator

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://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://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. Aggregators **must 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**. 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:vendors@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.

Rubric:	NOT SCORED
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## Section B: Pre-Requisite: Adjustable Block Program Qualification

**Question 1.** Illinois Adjustable Block Program ID number:

## 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.

Rubric:	NOT SCORED
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**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.

Rubric:	NOT SCORED
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**Question 4.** Please describe the fee structure you will use for Illinois Solar for All projects. How will this differ by project/incentive type? How will this differ from the Adjustable Block Program, if applicable?

[NARRATIVE TEXT]

Explanation: This is collected for informational purposes only.

Rubric:	Max Possible Score:	Min. Score Required:
N/A	NOT SCORED	NOT SCORED

**Question 5.** Describe the anticipated volume in total capacity (kW AC) annually for Illinois Solar for All projects.

[NARRATIVE TEXT]

Explanation: This is collected for informational purposes only.

Rubric:	Max Possible Score:	Min. Score Required:
N/A	NOT SCORED	NOT SCORED

## Section D: Program Requirements

**Question 6.** Please describe your plan to ensure Designees meet the job training requirements for Illinois Solar for All. Will your firm take steps prior to assigning Designees to ensure that qualified trainee graduates are on staff or a qualified installer/contractor is used?

[NARRATIVE TEXT]

Explanation: Please indicate your plan for meeting the job training requirements in the first through the third years of participation, as minimum project hour requirements increase from 10% to 33% across your portfolio of Illinois Solar for All projects, as well as the additional requirement that at least one qualified trainee is used on 33% of Low-Income Distributed Generation projects. Failure to meet these requirements across all projects by Designees will jeopardize your status as an Illinois Solar for All Approved Vendor.

It is recognized that these 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 for vetting and managing these requirements across Designees should express a clear understanding of the requirements, a moderate 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.

Rubric:	Max Possible Score:	Min. Score Required:
5 = Significant detail and/or probability of success	5	3
4		
3 = Moderate detail and/or probability of success		
2		
1 = Minimal detail and/or probability of success		

**Question 7.** Please describe your plan to ensure Designees meet installation quality assurance requirements, including Site Suitability Guidelines and overall installation quality. Will your firm take steps prior to assigning Designees to ensure quality standards are in place?

[NARRATIVE TEXT]

Explanation: Illinois Solar for All requires additional quality assurance steps beyond the Adjustable Block Program requirements to ensure quality installations, including minimum site suitability requirements and onsite inspections. Poor quality of workmanship of designees can jeopardize your status as an Illinois Solar for All Approved Vendor.

Please describe your plans for ensuring Designees understand and meet the program requirements for installation quality. Plans with little detail or specific actions will result in a Low Probability of Effectiveness score, where very detailed planning, protocols, and steps already taken will result in a High Probability of Effectiveness.

Rubric:	Max Possible Score:	Min. Score Required:
5 = High probability of effectiveness	5	3
4		
3 = Moderate probability of effectiveness		
2		
1 = Low probability of effectiveness		

**Question 8.** Please describe your plan to ensure Designees meet Illinois Solar for All minimum savings requirements.

[NARRATIVE TEXT]

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.

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

How will your firm ensure contracts offered by Designees to program participants meet these minimum savings requirements for various contract types? Please describe your plans for ensuring Designees understand and meet the program savings requirements. Plans with little detail or specific actions will result in a Low Probability of Effectiveness score, where very detailed planning, protocols and steps already taken will result in a High Probability of Effectiveness.

Rubric:	Max Possible Score:	Min. Score Required:
5 = High probability of effectiveness	5	3
4		
3 = Moderate probability of effectiveness		
2		
1 = Low probability of effectiveness		

**Question 9.** Please describe your plan to ensure Designees meet Illinois Solar for All consumer protection requirements.

[NARRATIVE TEXT]

Explanation: Illinois Solar for All consumer protections mirror the Adjustable Block Program in most respects, but include additional requirements, including but not limited to no upfront costs and presenting contracts and documents in native languages. How will your firm ensure all consumer protections are met? Will your firm take steps prior to assigning a Designee that each Designee understands and will abide by these requirements? Failure of Designees to meet these requirements will jeopardize your status as an Illinois Solar for All Approved Vendor.

Please describe your plans for ensuring Designees understand and meet consumer protections requirements. Plans with little detail or specific actions will result in a Low Probability of Effectiveness score, where very detailed planning, protocols, and steps already taken will result in a High Probability of Effectiveness.

Rubric:	Max Possible Score:	Min. Score Required:
5 = High probability of effectiveness 4 3 = Moderate probability of effectiveness 2 1 = Low probability of effectiveness	5	3

**Question 10.** Will your firm monitor or encourage in any way project development in environmental justice communities for Illinois Solar for All projects?

[NARRATIVE TEXT]

Explanation: Illinois Solar for All has a programmatic goal of ensuring 25% of all incentives are used to benefit environmental justice communities. The Program Administrator will provide tools to assist in identifying qualified communities. Will your firm monitor the project siting or location of customers of Illinois Solar for All projects within these communities? Will your processes, Designee selection, or fee structure help to support this goal?

Rubric:	Max Possible Score:	Min. Score Required:
3 = Will monitor and actively encourage development in these communities 2 = Will monitor development in these communities 1 = No specific plans	3	None



## Completing Your Registration

The Approved Vendor must upload this completed form as part of the registration process initiated at 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 Aggregator 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).

# Attestations for Aggregators

I declare that:

- a) I am the owner (for sole proprietorship), partner (for partnership), or the authorized agent (for corporation, LLC, or non-profit) of the applicant organization.
- b) The information provided on this form is true and correct to the best of my knowledge.
- c) I agree to participate in registration and any initial or recurrent required training.
- d) I agree to abide by the ongoing program terms and conditions.
- e) I agree to maintain registration to do business in Illinois.
- f) I agree to provide updated information to the Administrator on any complaints, lawsuits, legal or regulatory action, bankruptcy, or any other material adverse changes in business condition when it becomes available.
- g) I agree to provide samples of marketing materials or content used by our company, or our subcontractors/installers, affiliates, or Designees to the Program Administrator for review upon initial registration approval. In addition, I will provide copies of any marketing material related to the sale, financing, or installation of solar photovoltaic systems that will apply to participate in the Illinois Solar for All program, or related to the Illinois Solar for All program itself, whenever requested by the IPA or Program Administrator. I furthermore agree to make changes to marketing materials requested by the IPA or Program Administrator in their efforts to ensure that such materials are not deceptive, confusing, or misleading, and to further ensure that such materials do not feature misrepresentations about our relationship to the IPA or the Illinois Solar for All program.
- h) I agree to comply with all consumer protection guidelines published by the Program Administrator and acknowledge that a failure to do so may jeopardize my ability to participate in the program.
- i) I agree to provide and maintain credit and collateral requirements pursuant to Section 6.16.1 of the Long-Term Renewable Resources Procurement Plan.
- j) I agree to complete annual reports by the report deadline; disclose names and other information on installers and projects; document that all installers and other subcontractors comply with applicable local, state, and federal laws and regulations, including Illinois Commerce Commission registration as Distributed Generation Installers; provide current status of unfinished projects and credits generated and delivered by completed projects; and any other annual report requirements as determined by the Administrator.
- k) I agree to comply with all community solar subscriber reporting requirements, including providing updated and accurate subscriber data.
- l) I agree to provide company financial statements and/or project references upon request of the Program Administrator.
- m) I will comply with all other Program rules and Administrator requests.
- n) If any requirements are implemented by the IPA or Program Administrator that I am unable to comply with, I agree to immediately request to withdraw my qualification to act as an Approved

Vendor or Approved Vendor Aggregator for any projects not already under contract with the utilities or the IPA and cease all new Approved Vendor activities.

- o) I agree to maintain my active status as an Adjustable Block Program Approved Vendor. Failure to do so or disqualification from that program for any reason will result in immediate removal from the Illinois Solar for All program.
- p) I agree that any registration, project submittal, and project performance data and information (including any quarterly or annual reports) may be shared between the IPA, the Program Administrators for the Illinois Solar for All program and the Adjustable Block Program, the Illinois Commerce Commission, and, where applicable, Commonwealth Edison, Ameren Illinois, and MidAmerican Energy Company. To the extent these submittals contain information I deem confidential, proprietary, or privileged information that could cause competitive harm if disclosed to a third party or made publicly available, I will endeavor to designate them as such when furnished to the Program Administrator.
- q) I agree that once project submittals have satisfactorily met all Illinois Solar for All requirements, the Program Administrator will share project data with the Adjustable Block Program Administrator. The ABP Administrator will then facilitate the execution of the REC contract or confirmation with the Approved Vendor and counterparty (IPA or utility), subject to approval by the Illinois Commerce Commission.
- r) I understand the Illinois Solar for All program goal to utilize 25% of incentives for projects sited in environmental justice communities and will strive to site, market, and acquire customers in these areas in accordance with this goal.
- s) I will identify and include community organizations and local partners in planning, outreach, and project development phases for Illinois Solar for All projects where possible and according to specific requirements for ILSFA community solar projects.
- t) I have read and understand the Site Suitability Guidelines and will incorporate the guidelines therein into all ILSFA site assessments and business practices.
- u) I have read the Program Resources Guide and will, to the best of my ability, help direct prospective ILSFA participants to relevant improvement, financing, energy efficiency, and healthy home resources identified in the Program Resources Guide.
- v) I agree that all contracts for ILSFA projects presented to customers/program participants will meet the minimum savings requirements, defined as:
  - a) Any payments made by program participants must be, on an annual basis, less than 50% of the annual first year estimated production and/or utility default service net metering value to be received by the customer. This excludes multifamily buildings where tenants do not pay for electricity bills directly.
  - b)  $\text{Annual Customer Payment} \div \text{First Year Net Metering Value} \leq 0.5$
- w) I agree to provide documentation that ensures owners of multifamily buildings in the distributed generation program, where tenants do not pay for electricity directly, demonstrate that the value of the energy savings from net metering is passed to tenants through reduced (or not raised) rents or by other means.
- x) I agree that any contract presented to customers/program participants will include no upfront costs.

- y) I agree to use standardized, automatically generated disclosures, which will be presented to each Distributed Generation customer at least seven days before consummation of the transaction and will include the right to cancel the transaction within seven business days after consummation.
- z) I agree that financing amounts, terms, and conditions must be based on an assessment of the program participant's ability to repay the debt, as defined by Regulation Z, which is a federal rule that implements aspects of the Truth in Lending Act and the Dodd-Frank Act.
- aa) I agree that for qualified low-income customers, loans should not be secured by the program participant's home or home equity. While such unsecured loans may entail a higher interest rate, especially for customers with low credit scores or little credit history, they avoid the risk of liens and foreclosures for customers who default on their loans.
- bb) I agree that customer contracts may not include prepayment penalties.
- cc) I agree that marketing and contractual materials must be in the language requested by the customer and it is the responsibility of the Approved Vendor to produce those translated materials.
- dd) I agree to use Qualified Job Trainees on ILSFA projects to meet all annual requirements across all ILSFA projects and specific requirements for each Distributed Generation project. For Low-Income Distributed Generation projects, this means using at least one Qualified Job Trainee on 33% of projects. Across the entire portfolio of ILSFA projects, this means a commitment to using job trainees to complete 10% of installation hours in year one of program participation, 20% of installation hours in year two of program participation, and 33% of installation hours in year three and beyond of program participation.
- ee) I agree to the income eligibility guidelines and verification procedures outlined in the Illinois Solar for All Vendor Manual and accept that it is the Approved Vendor's responsibility to provide all necessary information and data to meet and verify these requirements according to these guidelines. I will ensure that all personally identifiable information is protected and that all potential customers/program participants undergoing income verification will be treated according to established Illinois Solar for All procedures and with respect, courtesy, and professionalism.
- ff) I agree to ensure access to all solar installations for random onsite inspections by the Program Administrator and its subcontractors.

I attest that the statements above are true and correct.

**[E-SIGN HERE]**

(automatically stamped with username, time, and IP address)