Single-Family Home LMI Solar Program Request for Proposals Template

A Solar for All Greenhouse Gas Reduction Fund-Compliant Solar Program Design for States – July 2023

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**ABOUT THIS PROJECT**

This template was produced as part of the [Scaling Up Solar for Under-Resourced Communities Project](https://www.cesa.org/projects/scaling-up-solar-for-under-resourced-communities/). This project, led by the Clean Energy States Alliance (“**CESA**”), seeks to accelerate the development of solar projects for three distinct subsets of the low- and moderate-income (“**LMI**”) solar market: single-family homes, manufactured homes, and community institutions, including multifamily affordable housing. For the single-family homes track, the project team has worked with states and green banks across the country to help design and launch LMI solar programs adapted from a public-private partnership third-party ownership model successfully adopted in Connecticut that led to the adoption of more than 3,000 solar projects for LMI homeowners in that state. Additional resources are available about the program model on our [website](https://www.cesa.org/projects/scaling-up-solar-for-under-resourced-communities/).

With the passage of the Inflation Reduction Act (“**IRA**”), additional federal funding is now available for states to launch programs that meet this project’s goals to serve LMI communities and transform the LMI solar market. CESA has produced this template and other program documents that can be used by states and other relevant stakeholders to design and launch programs that follow the Connecticut model, as updated to reflect policy innovations in the IRA and in other states such as Rhode Island and the District of Columbia. More information about the template documentation is available below and on CESA’s [website](https://www.cesa.org/projects/scaling-up-solar-for-under-resourced-communities/resources/).

**ACKNOWLEDGEMENTS**

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In addition, this document has benefitted from input and feedback from CESA’s Executive Director, Warren Leon.

We also thank the Yale Center for Business and the Environment for their funding through the Yale Planetary Solutions in Clean Energy Internship Program for Allie Garrett’s participation.

**ABOUT THIS TEMPLATE RFP**

This template is part of several resources produced by CESA in the summer of 2023 to assist states and other relevant stakeholders in designing and launching single-family homes LMI solar programs. Other relevant documentation, such as a program guidance to read along with this RFP, is available here: <https://www.cesa.org/projects/scaling-up-solar-for-under-resourced-communities/resources/>

Additional guidance on community solar or solar+storage for multi-family homes is forthcoming. Please refer to our [website](https://www.cesa.org/projects/scaling-up-solar-for-under-resourced-communities/) for the most up-to date information on these topics.

**HOW TO USE THIS DOCUMENT AND THE RELATED GUIDANCE**

This template RFP is available free of charge to states or other eligible applicants that will solicit a solar developer to build new or expand existing Solar for All programs for single-family homes.

The RFP is written for states that will support LMI households through **public-private partnerships** utilizing **elevated incentives** and **third-party ownership**. This model applies by default to **owner-occupied single-family homes**, although the RFP also provides an option for tenants to participate, together with a homeowner. This model requires that third-party ownership be enabled in the state. It accommodates a large number of policy contexts and is designed to be flexible.

The RFP is intended to streamline states’ processes for securing one or more third-party solar developers. It provides program guidance with recommended language, which states should adjust to reflect their program design and local context. To use this document, states will need to provide state-specific information, particularly in areas marked with brackets [like these].

States will also have to make program design choices. In most cases, a default choice is available, and comments throughout the document provide extensive information to guide the state’s decisions. For more information, reference CESA’s program design guidance: <https://www.cesa.org/projects/scaling-up-solar-for-under-resourced-communities/resources/>

For questions about this document, you may reach out to Vero Bourg-Meyer, CESA Project Director for Solar and Offshore Wind at [Vero@cleanegroup.org](mailto:vero@cleanegroup.org).

State and tribal government officials can sign up for CESA’s Solar for All updates by completing this form: <https://forms.office.com/r/9C8TaLdzm6>

**ABOUT THIS DOCUMENT AND IRA PROGRAMS AND REGULATIONS**

To maximize the funding opportunities afforded to states and other relevant stakeholders through the IRA, this program and RFP templates are designed to comply with the following:

1. The [Notice Of Funding Opportunity](https://www.grants.gov/web/grants/view-opportunity.html?oppId=348957) (“**NOFO**”) issued by the U.S. Environmental Protection Agency (“**EPA**”) on June 28, 2023, pertaining to the Solar for All competition (“**Solar for All**” or “**the Competition**”) of the [Greenhouse Gas Reduction Fund](https://www.epa.gov/system/files/documents/2023-04/GGRF%20Implementation%20Framework_730am.pdf) (“**GGRF**”);
2. The [Notice of Proposed Rulemaking](https://www.govinfo.gov/content/pkg/FR-2023-06-01/pdf/2023-11718.pdf) (“**NOPR**”) relevant to the low-income tax credit bonus program under [26 U.S.C § 48€](https://www.law.cornell.edu/uscode/text/26/48#:~:text=(e)Special%20rules%20for%20certain%20solar%20and%20wind%20facilities%20placed%20in%20service%20in%20connection%20with%20low%2Dincome%20communities) (the “**Low-Income ITC Adder**”); and
3. The preliminary rules relevant to [26 U.S.C § 48(a)(14)](https://www.law.cornell.edu/uscode/text/26/48#:~:text=(14)Increase%20in%20credit%20rate%20for%20energy%20communities) (the “**Energy Community ITC Adder**”).

As changes are made, program designs adapted to local circumstances, and clarifications offered by federal agencies, we ***strongly encourage*** the users of this template to thoroughly familiarize themselves with the NOFO, NOPR, and relevant guidance and to not rely solely on the information provided in this document. We have made our best efforts to be thorough.

**ABOUT THE EPA SOLAR FOR ALL COMPETITION**

EPA issued the [NOFO for the Solar for All competition](https://www.grants.gov/web/grants/view-opportunity.html?oppId=348957) of the Greenhouse Gas Reduction Fund on June 28, 2023. You can find a summary of key features below. Please refer to the NOFO for additional details.

The overall goal of the Competition is to expand the number of low-income and disadvantaged communities that are primed for investment in residential and community solar.[[1]](#footnote-2) The Competition will provide up to 60 awards in total, ranging from $25 million to $400 million:

1. Up to 56 awards, one to serve each of the 56 states and eligible territories;
2. Up to 5 awards to serve American Indian and Alaska Native Communities; and
3. Up to 10 awards to serve similar communities across multiple states.

Eligible applicants are states, the District of Columbia, the Commonwealth of Puerto Rico, the Virgin Islands, Guam, American Samoa, and the Commonwealth of the Northern Mariana Islands, Indian Tribes as defined in Section 302(r) of the Clean Air Act, municipalities as defined in Section 302(f) of the Clean Air Act, and eligible nonprofit recipients as defined in Section 134(c)(1) of the Clean Air Act.[[2]](#footnote-3)

**DISCLAIMER**

This document was prepared as an account of work sponsored by an agency of the United States Government. Neither the United States Government nor any agency thereof, nor any of their employees, makes any warranty, express or implied, or assumes any legal liability or responsibility for the accuracy, completeness, or usefulness of any information, apparatus, product, or process disclosed, or represents that its use would not infringe privately owned rights. Reference herein to any specific commercial product, process, or service by trade name, trademark, manufacturer, or otherwise does not necessarily constitute or imply its endorsement, recommendation, or favoring by the United States Government or any agency thereof. The views and opinions of authors expressed herein do not necessarily state or reflect those of the United States Government or any agency thereof.

[STATE ENTITY LOgo]

**REQUEST FOR PROPOSAL**

**For: Solar Developer**

[Program TITLE]

[STATE ENTITY NAME]

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# Overall RFP Goals

In this Request for Proposals (the “**RFP**”), the [STATE ENTITY] (“[**STATE ENTITY NAME**]”), is soliciting proposals from a firm or firms qualified to:

* Provide solar leases and/or solar Power Purchase Agreements (“**PPAs**”) to Eligible Customers, as defined below in Section 8.1 (*Customer Eligibility*);
* Receive up to [AMOUNT] ($###) in elevated incentives from [STATE ENTITY] (the “**Elevated Incentives**”) and up to [AMOUNT] ($###) in incentives for solar-enabling upgrades from [STATE ENTITY] to support the efficiency, repair, and enabling work further described below in Section 8.2.4 (*Eligible Technology*) (the “**Enabling Upgrade** **Incentives**”) with a goal to reach [NUMBER OF PROJECTED HOUSEHOLDS] within five (5) years of the date of the cooperation agreement from the U.S. Environmental Protection Agency (“**EPA**”) with [STATE] under the Greenhouse Gas Reduction Fund (“**GGRF**”);
* Specifically target Eligible Customers (as defined below in Section 8.1 (*Customer Eligibility*)) to receive the benefit of solar including by using community-based marketing tactics, either alone or with a partner;
* Manage a flexible income-verification process, following the broad guidelines set in this RFP, and any further guidelines set forth by [STATE ENTITY] [and [IMPLEMENTING PARTNER/ADMINISTRATOR];
* Receive marketing support from staff and/or consultants of the [STATE ENTITY / IMPLEMENTING PARTNER];
* Participate in [STATE]’s workforce development programs, including [DESCRIPTION];
* Over time, work with [STATE ENTITY] to align programs, processes and products with neighboring states to lower solar costs for customers, for instance collaborating on solar workforce development strategies and programs, coordinating and aligning income verification processes, consolidating approaches to paperwork submission and processes, and otherwise helping [STATE ENTITY] develop streamlined programs to benefit Low- and Moderate-Income (“**LMI**”) solar and Solar + Storage (“**S+S**”) customers;
* Support [STATE]’s compliance with its EPA GGRF cooperation agreement; and
* [OTHER AS RELEVANT].

[STATE ENTITY] developed this RFP and will administer the resulting program ([PROGRAM TITLE]) [in close collaboration with [IMPLEMENTATION PARTNER]. Additional information about the role of [STATE ENTITY] in administering the program is available in Section 5 (*[STATE ENTITY] Background*) below.

# Number of Firms to be Selected

[STATE ENTITY] seeks to select [one (1)] qualified partner[s].

[STATE ENTITY] reserves the right, in its sole discretion, to select additional firms as a result of this RFP based on the strength of the applications received.

# RFP Deadline and Schedule

## Deadline

**To be considered, proposals must be submitted before the following date: [DATE] at [TIME & TIME ZONE]. This is a strict deadline. No proposals will be accepted after [DATE / TIME].**

## Schedule

Unless otherwise stated, all deadlines shall be midnight [TIME ZONE].

|  |  |
| --- | --- |
| **Milestone** | **Date** |
| RFP launch date | [DATE / TIME] |
| Virtual Bidders’ Conference - Not Mandatory | [DATE / TIME] |
| Questions Due | [DATE / TIME] |
| Answers Posted | [DATE / TIME] |
| Proposals Due | [DATE / TIME] |

# State Objectives

This RFP will help the state of [STATE] fulfill the following objectives:

* Reduce emissions of greenhouse gases and other air pollutants by:
  + Supporting the equitable financing and deployment of rooftop solar technologies in [STATE]
  + [Other]
* Deliver benefits to American communities, particularly low-income and disadvantaged communities by:
  + Achieving higher penetration of solar in disadvantaged communities and for low-income households to ensure a more equitable distribution of the benefits of going solar;
  + Reach hard-to-reach Eligible Customers through Enabling Upgrades;
  + Offer pathways to ownership for Eligible Customers;
  + Maximize the benefits offered by existing efficiency programs;
  + Accelerate financing for “solar plus” offerings, which may include solar + energy efficiency or specific heating, ventilation, and air conditioning solutions, battery storage, electric vehicle chargers, or other appropriate clean energy technologies;
  + Provide opportunities for workforce development;
  + [Other]
* Mobilize financing and private capital to stimulate additional deployment of greenhouse gas- and air pollution-reducing projects by
  + Delivering attractive, low-cost, and long-term solar lease and PPA products to Eligible Customers in [STATE], including those that may be credit-challenged;
  + [Other]

# [STATE ENTITY] Background

This section summarizes the roles of [STATE ENTITY] with respect to both the RFP and the [PROGRAM TITLE] program.

## [STATE ENTITY] General Information

[DESCRIPTION OF STATE ENTITY]

## State Agenc[y/ies]’ Roles in this RFP

[STATE ENTITY]:

* Issues and manages the RFP process;
* Sets eligibility criteria;
* Supports and manages communication with the contractor;
* Qualifies eligible contractors;
* Participates in the selection committee; and
* Negotiates the contract.

## State Agenc[y/ies]’ Roles in Administering [PROGRAM ACRONYM]

The staff of [STATE ENTITY] will support the administration of the [PROGRAM NAME] program, which will be co-branded with the winning bidder[s]. [STATE ENTITY] will:

* Ensure adherence to [PROGRAM ACRONYM] rules and regulations;
* Administer the Elevated Incentive and the Enabling Upgrade Incentive (as defined above in Section 1 (Overall RFP *Goals*));
* Support the marketing of the [PROGRAM ACRONYM] program and related customer outreach;
* Collaborate with winning bidder[s] in [developing/strengthening] workforce development programs, including [DESCRIPTION];
* Periodically evaluate the success of the [PROGRAM ACRONYM] program, including by performing surveys and outreach to the winning bidder[s]’s customer base to ensure program goals are met;
* Work on streamlining processes, programs, and incentive administration through an online portal in collaboration with the winning bidder[s], taking into account customer feedback;
* Collaborate with the winning bidder[s] to ensure the success of the [PROGRAM ACRONYM] program and work to resolve implementation issues with the winning bidder[s];
* Collaborate with winning bidder[s] to ensure compliance with the EPA GGRF cooperation agreement;
* [OTHER].

# [STATE] Solar Market Background

## General Information

According to the [Solar Energy Industries Association](https://www.seia.org/states-map), [STATE] currently ranks [##] in the nation in solar installations with [###]MW of installed solar to date.[[3]](#footnote-4) This represents [######] homes and enough solar energy to power [######] homes as of the first quarter of 2023.[[4]](#footnote-5) As of [YEAR], solar power represented about [##]% of [STATE]’s clean energy portfolio.[[5]](#footnote-6)

According to NREL’s REPLICA dataset, [STATE] has [######] LMI single-family owner-occupied households, defined as at or below 80% of Area Median Income.[[6]](#footnote-7) These homes have a total solar capacity of [###]MW and total solar generation potential of [######]MWh, thus representing a significant opportunity for investment toward meeting the state’s [100% renewable] energy goals by [DATE].[[7]](#footnote-8) [FURTHER ELABORATION]

[2-3 SENTENCES DESCRIBING STATE REGULATORY STRUCTURE]

## Utility Rate Structure Summary

In [ELECTRIC UTILITY] territory, the following rates will be useful references for RFP applicants:

* [Basic Residential
  + Fixed Charge: $[###/MONTH]
  + Total kWh Rate: [###/kWh]
* Low Income Residential
  + Fixed Charge: $[###/MONTH]
  + Total kWh Rate: [###/kWh]]

## Historical Growth

This section summarizes background information about historical growth of the solar market in [STATE]. [FURTHER ELABORATION]

## Background Information about the [STATE] LMI Market

This section presents data from the U.S. Department of Energy LEAD tool regarding the location and distribution of owner-occupied single-family dwellings in [STATE]. The tool is available at: <https://www.energy.gov/eere/slsc/maps/lead-tool>. [FURTHER ELABORATION]

# Summary of State Solar Policies and Background

## [RELEVANT POLICY]

[DESCRIPTION]

## [RELEVANT POLICY]

[DESCRIPTION]

## [RELEVANT POLICY]

[DESCRIPTION]

# [PROGRAM NAME] Eligibility

The [PROGRAM NAME] program (“[**ACRONYM**]”) described in this RFP will provide Elevated Incentives to the selected bidder to provide Eligible Customers with Eligible Products under the [ACRONYM] program rules. As this is a new program, some program implementation elements may be changed in consultation with the winning bidder[s] to address implementation challenges as they arise.

## Customer Eligibility

Eligible customers are those that meet the requirements of this Section 8.1 (*Customer Eligibility*) (the “**Eligible Customers**”).

1. All Eligible Customers enrolled in the [ACRONYM] program must meet the household eligibility criterion set below in Section 8.1.1 (*Household Eligibility*).
2. In addition, customers must meet at least one of the following criteria:
   1. The geographic criterion set below in Section 8.1.2 (*Geographic Eligibility*); or
   2. The income eligibility criterion set below in Section 8.1.3 (*Income Eligibility*).

### Household Eligibility

Customers in the [PROGRAM ACRONYM] program must own the home in which the solar system is installed. [Where a tenant lives in the home, both the tenant and the homeowner will be required to sign the customer contract with the system owner. Unless the home is located in a GGRF DAC Area as defined below, the tenant must income qualify as stated in this RFP.]

### Geographic Eligibility

#### GGRF DAC Areas, In General

Eligible Products can be offered to a customer residing within an area designated by EPA as a “low-income and disadvantaged communities” as defined by the GGRF Notice of Funding Opportunity (“**NOFO**”), i.e.:

1. Areas identified through the [Climate and Economic Justice Screening Tool](https://screeningtool.geoplatform.gov/en/#3/33.47/-97.5) (“**CEJST**”), the publicly available mapping tool developed by the White House Council on Environmental Quality; or
2. Areas included in the limited supplemental set of census block groups that are at or above the 90th percentile for *any* of [EJ Screen’s Supplemental Indexes](https://www.epa.gov/ejscreen/ej-and-supplemental-indexes-ejscreen) when compared to the nation or state;
3. Areas within Tribal lands as included in EJScreen;

together, (the “**GGRF DAC Areas**”).

#### GGRF DAC Areas Maps

A low-resolution map is available below and geospatial data are available for download as follows:

* EJScreen data is available for download here: <https://www.epa.gov/ejscreen/download-ejscreen-data>
* CEJST data is available for download here: <https://screeningtool.geoplatform.gov/en/downloads>

[INSERT STATIC STATE MAP OF GGRF DAC AREAS FOR INFORMATION]

#### Geographic Eligibility Verification

Winning bidder[s] will provide [STATE] with the ZIP code of the projects and specify whether the customer is eligible because the project is located in a GGRF DAC Area or whether the customer solely qualifies under the income eligibility below, in which case winning bidder[s] will comply with the income verification process set below.

### Income Eligibility

Eligible Products can be also offered to a customer meeting the requirements set forth below in (1) or (2):

1. Individuals and households with incomes:
   1. **For Metropolitan Areas**

At or below the greater of:

* + 1. 80% Area Median Income (“**AMI**”); and
    2. 200% of the Federal Poverty Level;
  1. **For Non-Metropolitan Areas**

At or below the greater of:

* + 1. 80% AMI;
    2. 80% Statewide Non-Metropolitan Area AMI; and
    3. 200% of the Federal Poverty Level;

1(a) and 1(b), together, are the “**Income-Qualified Customers.**”

1. Individuals and households currently approved for assistance from or participation in at least one of the following income-based or income-verified federal assistance programs:
   1. U.S. Department of Health and Human Services (“**HHS**”)’ [Low Income Home Energy Assistance Program](https://www.acf.hhs.gov/ocs/low-income-home-energy-assistance-program-liheap)[[8]](#footnote-9) (“**LIHEAP**”);
   2. U.S. Department of Agriculture (“**USDA**”)’s [Supplemental Nutrition Assistance Program](https://www.fns.usda.gov/snap/supplemental-nutrition-assistance-program)[[9]](#footnote-10) (“**SNAP**”);
   3. U.S. Department of Energy’s [Weatherization Assistance Program](https://www.energy.gov/scep/wap/weatherization-assistance-program)[[10]](#footnote-11) (“**WAP**”);
   4. Federal Communications Commission’s [Lifeline Support for Affordable Communications](https://www.fcc.gov/lifeline-consumers)[[11]](#footnote-12) (“**Lifeline**”);
   5. USDA’s [National School Lunch Program](https://www.fns.usda.gov/nslp)[[12]](#footnote-13);
   6. U.S. Social Security Administration’s [Supplemental Security Income](https://www.ssa.gov/ssi/); or
   7. Any other verified government or non-profit program serving Asset Limited, Income Constrained, Employed (“**ALICE**”) individuals or households designated by the EPA Administrator;

together, the “**Program-Qualified Customers**”

#### AMI and Federal Poverty Level

AMI income brackets are set by [AGENCY] and available here: [URL TO LIST OF AMIs IN STATE]

The Federal Poverty Level is set by HHS on an annual basis and available here: <https://www.healthcare.gov/glossary/federal-poverty-level-fpl/#:~:text=A%20measure%20of%20income%20issued,and%20Medicaid%20and%20CHIP%20coverage>.

In 2023, the Federal Poverty level is as follows:

| **Family Size** | **2023 Maximum Income** |
| --- | --- |
| For individuals | $14,580 |
| For a family of 2 | $19,720 |
| For a family of 3 | $24,860 |
| For a family of 4 | $30,000 |
| For a family of 5 | $35,140 |
| For a family of 6 | $40,280 |
| For a family of 7 | $45,420 |
| For a family of 8 | $50,560 |
| For a family of 9+ | Add $5,140 for each extra person |

#### Income Verification Process

The income verification process of the [ACRONYM] program will be driven by the customer and flexible, so as to limit invasive questions from contractors to [STATE] households, and so as to reduce risks posed by the storage of sensitive customer data with a private sector organization.

##### For Income-Qualified Customers

Income-Qualified Customers will be able to choose one of the following methods to self-verify:

1. Customers may provide a self-attestation in a form to be provided by [STATE], substantially in the form attached to this RFP in Appendix B to certify they meet the income requirements set above in Section 8.1.3 *Income* Eligibility*)* with respect to annual income and household size; or
2. Customers may provide evidence of participation in any of the following programs within the last [NUMBER] years their solar contractor. Qualifying programs are:
   1. LIHEAP;
   2. SNAP;
   3. WAP;
   4. Lifeline;
   5. National School Lunch Program;
   6. Supplemental Security Income; or
   7. Any other verified government or non-profit program serving ALICE individuals or households designated by the EPA Administrator.

##### For Program-Qualified Customers

Program-Qualified Customers must provide their solar contractor with an award letter demonstrating participation in the programs above issued within the 12 months prior to the installation.

## Solar Product Eligibility

The winning bidder[s] of this RFP will provide the types of products described in this Section 8.2 (*Solar Product Eligibility*) to the Eligible Customers in compliance with the [PROGRAM ACRONYM] Rules set forth in Section 8.3 (*Program Rules*) (the “**Eligible Products**”).

### Third-Party Ownership

All types of third-party ownership structures that allow customers to access solar and receive part of the benefits of the Investment Tax Credits (“**ITC**”) are eligible under the [PROGRAM ACRONYM] program. Both PPAs and solar leases are eligible.

### Minimum Eligible Products Requirements

The following minimum requirements are applicable to all Eligible Products:

1. Eligible Products must be made available to Eligible Customers with no money down;
2. Eligible Products must be cash-flow positive on day one for Eligible Customers and include contracted 1st-year customer net savings minimums of 20% for Eligible Customers;
3. Eligible Products must allow Eligible Customers to receive a substantial part of the financial benefits afforded by the ITC (or after 2025, the technology neutral tax credit Clean Energy Investment Tax Credit (the “**CEITC**”)) to the winning bidder[s] and be structured to yield projected net savings of 20% to Eligible Customers during the contract term;
4. Customer contracts for the Eligible Products must include production guarantees for the whole contract term;
5. Eligible Products must include ongoing maintenance support and continue to offer maintenance support even in the case of sale of the solar leases or PPA to third parties;
6. Eligible Products must include solar system insurance for the whole term of the customer contract;
7. Eligible Products must include robust warranty management post-installation.

### Preferred Eligible Products Features

In the evaluation of proposals, preference will be given to those that:

1. Propose to include pathways to ownership for Eligible Customers, including for example early repayment clauses and purchase options in lease contracts, or purchase options following milestones in PPAs;
2. Propose to use alternative approaches to underwriting instead of, or in addition to, FICO;
3. Propose approaches that limit risk exposure from escalators to Eligible Customers;
4. Includes choices in the contract pricing structure for consumers;
5. Offer additional technologies such as energy storage, EV chargers, and/or energy efficiency services that can provide deeper savings to Eligible Customers.

### Eligible Technology

The [ACRONYM] program is intended to spur the development of grid-tied solar photovoltaic (“**PV**”) systems smaller than [MAXIMUM CAPACITY] kWDC in capacity. Please refer to Section 8.3 (*Program Rules*) below for additional details.

[All Eligible Customers should be offered a basic energy audit to ensure customers have the opportunity to receive deeper savings from their solar installations. [ADD MINIMUM STANDARDS FOR THE EFFICIENCY AUDIT]]

Additional incentives will be offered to winning bidder[s] or their approved contractors, as the case may be, that provide PV-enabling upgrades for homeowners, including:

* Efficiency work that can maximize solar savings by reducing the customer’s load, including a basic energy audit;
* Electrical panel upgrades necessary to solar installations;
* Structural repairs such as roof repairs; and
* Individual household access to the internet for system monitoring purposes.

See Section 10.2 (*Accessing the Enabling Upgrade Incentive*) below for additional details about the Enabling Upgrade Incentive.

[The applicants are encouraged to provide options for battery storage as part of the Eligible Products offered to Eligible Customers in their RFP response. If storage is included Elevated Incentive amounts related to solar+storage should be included in the proposal in addition to solar only products.]

## Program Rules

### General Rules

All projects must adhere to the following rules and regulations:

* [PV arrays must not be installed on any roof that is expected to be replaced within [10] years;
* The PV project must be designed so that the estimated annual energy output is at least [80]% of the default optimal output for a fixed PV project of the same capacity, as estimated by PVWATTS or a similar tool. [The PV project must have a measured total solar resource fraction (“**TSRF**”) of [0.8] or greater.[[13]](#footnote-14)]
* All installations must follow the most current adopted edition of [STATE]’s Building Code and National Electrical Code.
* All equipment used must be registered on the California Energy Commission’s Solar Equipment Lists, at <https://www.energy.ca.gov/programs-and-topics/programs/solar-equipment-lists>.
* A percentage of projects will receive an inspection. See below in Section 8.3.4 (*[ACRONYM] Program Administration*) for additional information about inspections.
* [OTHER]]

### Build America, Buy America

Certain projects funded with federal awards under the EPA GGRF are subject to the sourcing requirements under the Build America, Buy America (“**BABA**”) provisions of the Infrastructure Investment and Jobs Act (P.L. 117-58, §§70911-70917) that apply when using Federal funds for the purchase of goods, products, and materials on any form of construction, alteration, maintenance, or repair of infrastructure in the United States.

The Buy America preference requirement applies to “all the iron and steel, manufactured products, and construction materials used for the infrastructure project under an award for identified EPA financial assistance funding programs.”

Waivers are available based on projects.

### Davis Bacon Act

The Davis-Bacon Act (42 USC §§3141-3144) (“**DBA**”) sets out labor standards, including prevailing wages and fringe benefits, and applies to most federally funded contracts for construction of public works. The DBA labor standards and reporting requirements also apply to projects assisted with grants authorized by the Clean Air Act as provided in Section 314 of the Clean Air Act ([42 USC §7614](https://www.law.cornell.edu/uscode/text/42/7614)), which provide the funding for the [ACRONYM] program.

As per the cooperation agreement DBA compliance requirements will be as follows:

[include details from the grant agreement.]

### [ACRONYM] Program Administration

The contractor will access a dedicated application portal through which contractors can upload and/or certify, as the case may be, that consumer protection disclosures, geographic eligibility verification documents, and income verification documents, as relevant, have been received by Eligible Customers. For additional information about eligibility verification in the [ACRONYM] program, please see Section 8.1 (*Customer Eligibility*) above.

[STATE AGENCY] will work with the winning bidder[s] to train installers to facilitate the smooth administration of inspection processes by a third-party inspection vendor, and, after an initial trial period, will allow for self-inspection paired with random inspections to ensure program compliance. A draft inspection form, to be finalized by [STATE AGENCY] with input from the winning bidder[s], is available for review in Appendix E. **The bidders should include the cost of preparing inspection documents in their cost estimates.**

To the extent feasible while maintaining strong customer protections, [STATE AGENCY] and [IMPLEMENTING ORGANIZATION] will receive feedback from the winning bidder[s] on ways to facilitate program operations and limit paperwork.

# Scope of Services

The winning bidder[s] will supply Eligible Products to Eligible Customers and receive the benefits set forth below in Section 10 (*Benefits for RFP Partner*).

The Scope of Services may be altered to accommodate necessary changes agreed upon between [STATE AGENCY] and the winning bidder[s] during the contract negotiations phase of this RFP.

# Benefits for RFP Partner

The winning bidder[s] of this RFP will enter into a long-term partnership with [STATE AGENCY]. The winning bidder[s] will receive (i) access to the Elevated Incentive and the Enabling Upgrade Incentive, (ii) marketing assistance, (iii) the benefits of a long-term cooperation with [STATE AGENCY] in growing solar for LMI communities in [STATE], including the [NAME] workforce development program.

## Accessing the Elevated Incentive

The amount of Elevated Incentive per project in this RFP is expected to be proposed to [STATE] by applicants to this [ACRONYM] RFP as detailed below in Section 10.1.2 (*Elevated Incentive Rate and Maximum Elevated Incentive Per Project*).

For certain projects that receive additional amounts of ITC due to their location, applicants will be expected to propose how such ITC will be shared with Eligible Customers as further detailed in Section 10.1.3 (*ITC Amount and Elevated Incentives Interactions*) below.

### Elevated Incentive Total Amount

The total amount of Elevated Incentives accessible under the [ACRONYM] program will be [AMOUNT] [$###].

### Elevated Incentive Rate and Maximum Elevated Incentive Per Project

**The Elevated Incentive rate to be provided per kWDC for each solar project should be proposed by the applicant in their RFP proposal.**

The Elevated Incentive will be paid in one lump sum after inspection documents are submitted to and approved by [STATE AGENCY]

For reference, [FURTHER INFORMATION]

### ITC Amount and Elevated Incentives Interactions

In order to account for changes to the ITC that resulted from the implementation of the federal Inflation Reduction Act (the “**IRA**”) starting in January 2023, in particular changes to the ITC under [26 U.S.C § 48(e)](https://www.law.cornell.edu/uscode/text/26/48#:~:text=(e)Special%20rules%20for%20certain%20solar%20and%20wind%20facilities%20placed%20in%20service%20in%20connection%20with%20low%2Dincome%20communities) (the “**Low-Income ITC Adder**”) for projects that are sited (a) on Indian Land (defined below), and/or (b) in New Markets Tax Credits Areas (defined below), and under [26 U.S.C § 48(a)(14)](https://www.law.cornell.edu/uscode/text/26/48#:~:text=(14)Increase%20in%20credit%20rate%20for%20energy%20communities) (the “**Energy Community ITC Adder**”) for projects that are sited in Energy Communities (defined below), applicants are required to explain how they will share the value of these adders with Eligible Customers.

In this RFP, the term “ITC” is used to refer to either the ITC or its technology-neutral successor the CEITC as the case may be.

As additional amounts of federal incentives in the form of Low-Income ITC Adders and the Energy Communities Adder become available for projects, and to comply with the requirement that Eligible Products must allow Eligible Customers to receive a *substantial* part of the financial benefits afforded by the ITC or the CEITC to system owners (the winning bidder[s]) as stated above in Section 8.2 (*Solar Product Eligibility*), **the applicant’s proposals must include a proposal to (a) reduce the amount of Elevated Incentive in situations where the system owner will receive additional amounts of ITC under the IRA, and/or (b) reduce the cost of the solar lease or PPA charged to Eligible Customers, and/or (c) offer additional technologies, perks, or value to Eligible Customers.**

For the avoidance of doubt, this ITC sharing mechanism only applies to the Low-Income ITC Adder and the Energy Community ITC Adder. Solar companies will not be required to share the portion of ITC received for complying with domestic content requirements of the IRA, which unlike the Low-Income ITC Adders and the Energy Communities ITC Adders likely will involve additional direct costs for the private sector.

This RFP seeks to retain significant flexibility for the applicants to propose a mechanism that will provide substantial benefits to the largest possible number of Eligible Customers while not creating undue administrative burdens for the winning bidder[s]*.* [STATE] wishes to encourage applicants to be innovative in their approach to offering Eligible Products to Eligible Customers. **If beneficial, applicants can reference and utilize Appendix C (*TEMPLATE – ITC Percentage v. Proposed Incentive Level*) and D (*TEMPLATE – Estimated Year 1 Savings*) to propose incentive rates and sharing mechanisms.**

Additional information that is relevant to the proposed program administration is available below in Section 10.1.4 (*ITC Background*), Section 10.1.5 (*Low-Income ITC Adder*), and Section 10.1.6 (*Energy Community ITC Adder*) .

### ITC Background

For ease of reference, the ITC under the IRA is summarized below for projects under 1MWAC placed in service in 2022 or later and begin construction before 2033.[[14]](#footnote-15),[[15]](#footnote-16)

| **IRA Source**  **ITC and CEITC** | **Stackable Tax Credit Categories**  **ITC and CEITC** | **Credit Amount** |
| --- | --- | --- |
| 26 U.S.C § 48(a)(9)(A)(i), 26 U.S.C § 48(a)(9)(B)(i), & 26 U.S.C § 48E(a)(2)(A)(ii)(I) | 1. Base ITC for projects under 1 MWAC (with or without meeting wage and apprenticeship requirements) | 30% |
| 26 U.S.C § 48(a)(12)(C)(ii) & 26 U.S.C § 48E(a)(3)(B) | 1. Domestic content bonus | +10% points |
| 26 U.S.C § 48(a)(14) & 26 U.S.C § 48E(a)(3)(A) | 1. Energy Communities Adder[[16]](#footnote-17) | +10% points |
| 26 U.S.C § 48(e) and 26 U.S.C § 48E(h) | 1. Low-Income ITC Adder[[17]](#footnote-18) | +10% points[[18]](#footnote-19) |

### Low-Income ITC Adder

We encourage applicants to familiarize themselves with [the rules applicable to the Low-Income ITC Adder program administration](https://www.govinfo.gov/content/pkg/FR-2023-06-01/pdf/2023-11718.pdf). Some key elements are summarized below for ease of reference and to facilitate the applicants’ proposals of successful ITC sharing mechanisms.

**Section 10.1.5.3 (*Pathways for State Program Administration*) includes information that applicants will be required to provide to [STATE] in their RFP response.**

The Low-Income ITC Adder is available to solar projects sited either in New Markets Tax Credit Areas, or on Indian Land, or both.

#### Eligible Locations for the Low-Income ITC Adder

The areas in which a developer may site projects eligible for the Low-Income ITC Adder are as follows. These areas may or may not overlap with the GGRF DAC Areas used for program eligibility.

The Low-Income ITC Adder is available for projects sited in:

1. Any area within [STATE] designated as a “[low-income community](https://www.arcgis.com/apps/instant/sidebar/index.html?appid=0e980a986c6545a9b4eeb8fc35cebf5d)” under [26 U.S.C § 45D(e)(1)](https://www.law.cornell.edu/definitions/uscode.php?width=840&height=800&iframe=true&def_id=26-USC-1923830901-332395025&term_occur=999&term_src=title:26:subtitle:A:chapter:1:subchapter:A:part:IV:subpart:D:section:45D) (the “**New Markets Tax Credit Areas**”) for purposes of benefitting from the Low-Income ITC Adder, i.e., a census tract:
   1. Where the poverty rate is at least 20 percent; or
   2. Where the median family income does not exceed 80 percent of *statewide* median family income; or
   3. If within a metropolitan area, where the median family income for such tract does not exceed 80 percent of the *greater* of *statewide* median family income or the *metropolitan area* median family income; or
2. Any area within [STATE] designated as a “Indian land” under [25 U.S.C. 3501(2))](https://www.law.cornell.edu/uscode/text/25/3501#:~:text=The%20term%20%E2%80%9CIndian%20land%E2%80%9D%20means%E2%80%94)[[19]](#footnote-20) (“**Indian Land**”), i.e.:
   1. Any land located within the boundaries of an [Indian reservation](https://www.law.cornell.edu/definitions/uscode.php?width=840&height=800&iframe=true&def_id=25-USC-1492139875-1702021617&term_occur=999&term_src=title:25:chapter:37:section:3501), pueblo, or rancheria;
   2. Any land not located within the boundaries of an [Indian reservation](https://www.law.cornell.edu/definitions/uscode.php?width=840&height=800&iframe=true&def_id=25-USC-1492139875-1702021617&term_occur=999&term_src=title:25:chapter:37:section:3501), pueblo, or rancheria, the title to which is held—
      1. In trust by the United States for the benefit of an [Indian tribe](https://www.law.cornell.edu/definitions/uscode.php?width=840&height=800&iframe=true&def_id=25-USC-1121892347-1702021618&term_occur=999&term_src=title:25:chapter:37:section:3501) or an individual Indian;
      2. By an [Indian tribe](https://www.law.cornell.edu/definitions/uscode.php?width=840&height=800&iframe=true&def_id=25-USC-1121892347-1702021618&term_occur=999&term_src=title:25:chapter:37:section:3501) or an individual Indian, subject to restriction against alienation under laws of the United States; or
      3. By a dependent Indian community;
   3. Land that is owned by an [Indian tribe](https://www.law.cornell.edu/definitions/uscode.php?width=840&height=800&iframe=true&def_id=25-USC-1121892347-1702021618&term_occur=999&term_src=title:25:chapter:37:section:3501) and was conveyed by the United States to a [Native Corporation](https://www.law.cornell.edu/definitions/uscode.php?width=840&height=800&iframe=true&def_id=25-USC-962488961-1702021620&term_occur=999&term_src=title:25:chapter:37:section:3501) pursuant to the [Alaska Native Claims Settlement Act](https://www.law.cornell.edu/topn/alaska_native_claims_settlement_act) ([43 U.S.C. 1601](https://www.law.cornell.edu/uscode/text/43/1601) et seq.), or that was conveyed by the United States to a[Native Corporation](https://www.law.cornell.edu/definitions/uscode.php?width=840&height=800&iframe=true&def_id=25-USC-962488961-1702021620&term_occur=999&term_src=title:25:chapter:37:section:3501)in exchange for such land;
   4. Any land located in a census tract in which the majority of residents are Natives (as defined in section 3(b) of the [Alaska Native Claims Settlement Act](https://www.law.cornell.edu/topn/alaska_native_claims_settlement_act) ([43 U.S.C. 1602(b)](https://www.law.cornell.edu/uscode/text/43/1602))); and
   5. Any land located in a census tract in which the majority of residents are persons who are enrolled members of a federally recognized Tribe or village.

#### Federal Allocation Process and Relevant Program Administration

Unlike a traditional tax credit, the Low-Income ITC Adder will require that the winning bidder[s], i.e., the residential project owner, apply to the U.S. Department of the Treasury (“**Treasury**”) be awarded “an allocation of environmental justice solar and wind capacity limitation.”[[20]](#footnote-21) Such award is not guaranteed, even for projects that meet the criteria to receive the Low-Income ITC Adder allocation.

Four Treasury program administration features are particularly relevant to this RFP and the ITC sharing mechanism to be proposed by applicants under Section 10.1.3 (*ITC Amount and Elevated Incentives Interactions*) above:

1. Treasury’s capacity allocation is capped per calendar year as follows:

| **Category** | **Cap** |
| --- | --- |
| **Category 1**: Located in a New Markets Tax Credits Area | 700 MWDC |
| **Category 2**: Located on Indian Land | 200 MWDC |

For Category 1 facilities, the 700 MWDC capacity limitation above will be split into two blocks and 560 MWDC will be reserved for residential behind-the-meter facilities such as those with the [ACRONYM] program.

1. Treasury will allocate capacity based on rules that prioritize projects so that within each category, Treasury will reserve at least 50 percent of the capacity for projects that meet at least one of two additional selection criteria that Treasury is creating, based on ownership and on location.[[21]](#footnote-22) As part of the location criterion, Treasury will prioritize projects located in a [Persistent Poverty County](https://www.ers.usda.gov/data-products/county-typology-codes/descriptions-and-maps/" \l ":~:text=3321%2C%20600%20dpi)-,Persistent%20Poverty,-Persistent%20poverty%20(353) or in a census tract that is designated in CEJST as disadvantaged based on energy burden and particulate matter (PM) 2.5 indicators.
2. According to [Treasury’s most recent guidance](https://www.govinfo.gov/content/pkg/FR-2023-06-01/pdf/2023-11718.pdf), a project owner may not apply after the project has been placed in service. The application to Treasury must include a *signed* contract with the customer. Projects must be completed within four years after receipt of the allocation.
3. Treasury will retain discretion to reallocate capacity limitations across categories and sub-categories in order to maximize allocation if a category or sub-category is oversubscribed across the whole program, including from project categories that are not included above. Additionally, unused allocation will be carried forward until 2024.

#### Pathways for State Program Administration

In recognition of the uncertainty resulting from the federal program administration above as to whether a project will receive the Low-Income ITC Adder allocation, [STATE] requires that applicants provide the levels of incentive and ITC sharing mechanism proposal that they will need to follow the default process below, which does not include applying to Treasury for the Low-Income ITC Adder but may include other adders as relevant (the “**Basic Process**”).

However, to encourage applicants to create a proposal and a process that take full advantage of the federal funding opportunities awarded by the Low-Income ITC Adder, [STATE] requires that applicants provide the levels of incentive and ITC sharing mechanism proposal that would be necessary for them to follow an alternative process that includes the Low-Income ITC Adder (the “**Alternative** **ITC Process**”). It is expected that winning bidders following a proposed Alternative ITC Process will be able to receive larger overall levels of incentives.

For the sake of clarity, applications under this RFP must provide information and proposals about both processes and offer explanations about preferred approaches. Should a project within a Deemed DAC Area not qualify for the Low-Income ITC Adder, the applicable process would be the Basic Process. **[STATE] strongly encourages applicants to propose a program administration process and ITC sharing mechanism that prioritizes meaningful savings for Eligible Customers, ease of administration, and maximization of federal funding sources including all available adders.**

##### Default Process: Not Pricing the Low-Income ITC Adder – Immediate Placement in Service

Under this pathway, the winning bidder[s] would enter into a lease or PPA contract with an Eligible Customer and proceed to install the solar system and place it in service. Winning bidder[s] would not apply to be awarded a Low-Income ITC Adder allocation from Treasury and would price the Eligible Products accordingly, taking into account the Elevated Incentives, as adjusted based on the RFP proposal under the ITC sharing mechanism above in Section 10.1.3 (*ITC Amount and Elevated Incentives Interactions*). As a reminder, applicants are required to propose incentive levels accordingly.

Applicants must propose in their ITC sharing mechanism an incentive rate that is specifically applicable to projects that meet the Low-Income ITC Adders geographic criteria under the IRA with GGRF funds.

##### Alternative ITC Process: Pricing the Low-Income ITC Adder – Postponing placement in service

[STATE] anticipates that under this pathway, the winning bidder[s] would enter into a lease or PPA contract with an Eligible Customer and inform said customer that the system would not be placed in service until after Treasury has issued a final decision on the allocation of a Low-Income ITC Adder.

Winning bidder[s]/project owners would price the Eligible Products **as if they were guaranteed to receive the Low-Income ITC Adder allocation.** To ensure that significant savings are made available to Eligible Customers, [STATE] will use funding from the GGRF to pay the Elevated Incentive, as adjusted through the ITC sharing mechanism. Once Treasury has issued a decision regarding the allocation for a given project, winning bidder[s]/project owners would place the project in service.

1. If Treasury has approved the allocation, the Elevated Incentives will be adjusted down following the ITC sharing mechanism agreement with the state, and the consumer price will not change.
2. If Treasury has denied the allocation for reasons other than the project not qualifying under the Internal Revenue Code, the Elevated Incentives will be adjusted up, following the ITC sharing mechanism agreement with the state, and the consumer price will not change.

### Energy Community ITC Adder

The areas in which a developer may site projects eligible for the Energy Community ITC Adder are as follows. These areas may or may not overlap with the GGRF DAC Areas used for program eligibility or with New Markets Tax Credit Areas or Indian Land.

The Energy Community ITC Adder is available for projects sited in any area within [STATE] designated as an “[energy community](https://arcgis.netl.doe.gov/portal/apps/experiencebuilder/experience/?id=a2ce47d4721a477a8701bd0e08495e1d)” under [26 U.S.C § 45(b)(11)(B)](https://www.law.cornell.edu/uscode/text/26/45#:~:text=amount%20so%20determined.-,(B)Energy%20community,-For%20purposes%20of) (the “**Energy Communities**”) for purposes of benefitting from the Energy Community ITC Adder, i.e.,

1. A brownfield site as defined [42 U.S.C. § 9601(39)](https://www.law.cornell.edu/uscode/text/42/9601#:~:text=(39)-,Brownfield%20site.,-%E2%80%94); or
2. A metropolitan statistical area or non-metropolitan statistical area which:
   1. Has (or, at any time during the period beginning after December 31, 2009, had) 0.17 percent or greater direct employment or 25 percent or greater local tax revenues related to the extraction, processing, transport, or storage of coal, oil, or natural gas (as determined by the Secretary of the Treasury or her delegate), and
   2. Has an unemployment rate at or above the national average unemployment rate for the previous year (as determined by the Secretary of the Treasury or her delegate); or
3. A census tract:
   1. In which:
      1. After December 31, 1999, a coal mine has closed, or
      2. After December 31, 2009, a coal-fired electric generating unit has been retired, or
   2. A census tract directly adjoining to any census tract described above.

## Accessing the Enabling Upgrade Incentive

### Enabling Upgrade Incentive Total Amount

The total amount of Enabling Upgrade Incentives accessible under the [ACRONYM] program will be [AMOUNT] [$###]. Enabling Upgrade Incentives are available to support winning bidder[s] or their approved contractors, as the case may be, that provide PV-enabling upgrades for homeowners, including:

* Efficiency interventions;
* Electrical panel upgrades;
* Structural repairs; and
* Individual household internet access.

Additional requirements are set forth below in Section 10.2.3 (*Requirements*).

### Maximum Enabling Upgrade Incentive Amount Per Project

The maximum Enabling Upgrade Incentive amount per solar project enrolled in this [ACRONYM] program is $[AMOUNT]

For reference, [FURTHER INFORMATION]

### Requirements

To qualify for the Enabling Upgrades above, developer must demonstrate they are necessary to properly install and maintain the PV system for a 20-year operating period:

* Efficiency interventions can be proposed with the goal to maximize solar savings through load reduction ;
* Electrical panel upgrades can be proposed if they are required for the safe and efficient installation and maintenance of a PV system;
* Structural/roof repairs can be proposed for roofs that would have to be repaired or replaced within [10] years of the solar installation or for structural defects that otherwise preclude safe solar installations;
* Individual household access to the internet can be proposed when it would enable a household to comply with system monitoring purposes from the developer or the utility.

If requested by [STATE], winning bidder[s] will submit up to three (3) bids from roofing or electrical contractors for the repair, replacement, or electrical services to [STATE]. No Enabling Upgrade work should be undertaken before [STATE] confirms in writing that such Enabling Upgrades are eligible for the Enabling Upgrade Incentive.

If roof repairs and/or electrical services are approved by [STATE], [STATE] will pay for roof repairs and/or electrical services on a per-project basis and reimburse subcontractors for their actual out-of-pocket costs incurred to complete the replacement and/or repair services within the limits of the quotes provided to the winning bidder[s] an up to the maximum Enabling Upgrade Incentive amounts above.

Selection preference may be given to projects located in [PRIORITY LOCATIONS IN STATE IF RELEVANT].

### ITC Amount and Elevated Incentives Interactions

The amount of ITC received for this project does not impact the amount of Enabling Upgrade Incentives received under the [ACRONYM] program.

## Marketing and Outreach Support

[STATE ENTITY] will provide general marketing, including promotion and communications, support to the winning bidder[s] to deploy the [PROGRAM ACRONYM] program. Specifically, the winning bidder[s] will target Eligible Customers to receive the benefit of Eligible Products including by using community-based marketing tactics, either alone or with a partner, under co-branding with [STATE ENTITY].

In addition, [STATE ENTITY] will assist the winning bidder[s] in identifying community events or other opportunities to promote the [ACRONYM] program. [STATE ENTITY] will make staff available to support direct outreach and to assist in the creation of collateral that will resonate with [STATE] customers, in collaboration with the winning bidder[s]’s staff.

[STATE ENTITY] staff will be available to answer questions from customers about program enrollment, eligibility and other topics related to [ACRONYM] and solar technology.

[STATE ENTITY] will make use of the following channels:

* [PARTNER ORG WEBSITE]
* [STATE ENTITY WEBSITE]
* Agency social media platforms, including but not limited to newsletters and [SOCIAL MEDIA PLATFORM USED BY STATE]

The winning bidder[s] would be invited to share their marketing database with respect to the [ACRONYM] program with [STATE ENTITY OR IMPLEMENTING ORG] to facilitate the marketing of the program.

## Long-Term Cooperation

Over time, [STATE ENTITY] wishes to work with the winning bidder[s] to align programs, processes and products with neighboring states to lower solar costs for customers, for instance collaborating on solar workforce development strategies and programs, coordinating and aligning income verification processes, consolidating approaches to paperwork submission and processes, and otherwise helping [STATE ENTITY] develop streamlined programs to benefit LMI solar and S+S customers.

# Proposal Process

## Proposal Format

The proposal should follow the following format:

* Executive Summary
  + Introduction to the company and its business model
  + Illustration of how the company will achieve the state’s goals
  + Introduction to how the company will meet the program requirements
* Technical Proposal
  + Description of Eligible Product(s) to be offered
  + Approach to savings
  + Approach to marketing
  + Approach to accessories market (if any)
  + Participation in workforce development
  + Interest in developing a long-term partnership and growing the program, possibly with additional public support
* History, Qualification, and Experience
  + Relevant experience with residential solar
  + Relevant experience with LMI solar
  + Staffing and installers network
  + References
* Cost Proposal
  + Proposed incentive levels
  + Approach to ITC benefit sharing with Eligible Customers, including adders
  + Sample customer contracts including approach to savings and pathways to ownership

## General Terms and Conditions

[STATE] reserves the right to:

* Accept or reject changes;
* Issue clarifications;
* Make awards with or without discussions;
* Not accept the lowest price point;
* Negotiate before contract award;
* Rescind offer after initial selection; and
* Make other changes as deemed necessary.

Further, [STATE ENTITY] are not responsible for expenses in submitting proposal.

## Proposal Evaluation Criteria and Scoring

Proposals found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further. Proposals that do not include all of the requirements will not be considered.

Only bidders submitting a proposal in accordance with the criteria set forth above shall be eligible for evaluation. Each submitted proposal meeting the administrative requirements will be evaluated by the [STATE ENTITY] and ranked from highest to lowest. Upon completion of the initial evaluation, bidders may be invited to participate in an interview phase of the selection process. However, the [STATE ENTITY] project team reserves the right to select and award the contract based on evaluation of the proposals without conducting formal interviews.

[STATE ENTITY] will evaluate and score all proposals. Responses from qualified bidders will be reviewed and evaluated according to the criteria outlined below:

### Evaluation Criteria Table

| **Evaluation Criteria** | **Possible Points** |
| --- | --- |
| Executive Summary | [10] |
| Technical Proposal | [30] |
| History, Qualification, and Experience | [30] |
| Cost Proposal | [30] |
| **Total Possible Points** | **100** |
| MBE/WBE/DBE[[22]](#footnote-23) Participation (additional potential points) | [6] |

Designated [STATE ENTITY] staff or selected advisors will evaluate the written proposals. [STATE ENTITY] staff may at any time during the evaluation process seek clarification from applicants regarding any information contained within their proposal. Final scores for each bidder will reflect a consensus of the evaluations. Any attempt by a bidder to contact a member of [STATE ENTITY] staff or selected advisors outside the RFP process, in an attempt to gain knowledge or an advantage, may result in disqualification of bidder.

[ADDITONAL DESCRIPTION]

## Instructions and Notification to Applicants

1. Applicants are advised to review all sections of this RFP carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.
2. Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are solicited. However, proposals that depart from or materially alter the terms, requirements, or scope of work defined by this RFP will be rejected as being non-responsive.
3. All costs associated with developing or submitting a proposal in response to this RFP, or to provide oral or written clarification of its content, shall be borne by the applicant. [STATE] assumes no responsibility for such costs.
4. Proposals are considered to be irrevocable for a period of not less than [120] days following the date set for submission of proposals.
5. All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein.
6. Proposals misdirected to other locations, or that are otherwise not present at the [STATE ENTITY] by the submission deadline for any cause will be determined to be late and will not be considered. For the purposes of this requirement, the official time and date shall be [OFFICAL CLOCK].
7. All proposals should identify the proposed team of professionals, including those employed by subcontractors, if any, along with respective areas of expertise and relevant credentials. Applicants should also provide a delineation of the portion of the scope of work for which each of these professionals will be responsible.
8. All proposals should include the applicant’s Federal Employer Identification Number.
9. All proposals should include a completed [RFP Response Certification Cover Form, included in this document.]
10. The purchase of services under an award made pursuant to this RFP will be contingent on the availability of funds and made at the discretion of [STATE ENTITY].
11. Awarding this RFP is based on the Evaluation Criteria set forth in this RFP. Applicants are advised, however, that all materials and ideas submitted as part of this proposal and during the performance of any award shall be the property of and owned by the [STATE ENTITY], which may use any such materials and ideas.
12. Interested parties are instructed to peruse the [STATE ENTITY]’s website ([WEBSITE]) on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP.
13. The agency should be aware of the State’s Minority Business Enterprise (MBE) requirements, which address the State’s goal of [NUMBER] percent [(##%)] participation by MBE’s in all procurements. For further information, visit the website ([WEBSITE]).
14. …

## Proposal Submission

Responses to this RFP are due **by [DATE, TIME, TIMEZONE]**. [One (1) electronic (PDF) version emailed to [EMAIL] and two (2) printed copies of the complete proposal must be mailed or hand-delivered in a sealed envelope marked]:

[ADDRESSEE]

Attention: [PROGRAM ACRONYM] RFP  
ADDRESS LINE 2  
ADDRESS LINE 3

**Note: No phone calls and late responses will be accepted, and responses received via electronic submission only will be disqualified.**

**Optional Bidders Conference**

[STATE ENTITY] will host a non-mandatory bidders conference on [DATE, TIME, TIMEZONE]. The Zoom details are as follows: [INSERT ZOOM DETAILS]

###

Appendix A: Terms and Definitions

|  |  |
| --- | --- |
| **Defined Term** | **Definition** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

Appendix B: Example of Self-Attestation Form for Eligible Customers

[STATE AGENCY LOGO]

[PROGRAM NAME] Attestation of Income

Full Legal Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ attest that my annual income for the year of contract date with [DEVELOPER NAME] vendor for a [INSERT PRODUCT] is below $[INCOME LIMIT].

Household Size in 20\_\_: \_\_\_\_\_\_\_

I do hereby attest that this information is true, accurate and compete to the best of my knowledge and I understand that any falsification may subject me to disqualification from the [ACRONYM] program and repayment of any incentives and funds paid to [STATE].

Applicant Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Appendix C:TEMPLATE – ITC Percentage v. Proposed Incentive Level

|  |  |
| --- | --- |
| ITC Percentage | Proposed Incentive Level ($ / [UNIT]) |
| 30% | $#.## / [UNIT] |
| 40% | $#.## / [UNIT] |
| 50% | $#.## / [UNIT] |
| 60% | $#.## / [UNIT] |

Appendix D: TEMPLATE – Estimated Year 1 Savings

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| System Size | Capacity   (kW-DC) | Year 1 Lease Payment | Year 1 Net Savings | Escalator – Scenario One | Escalator – Scenario Two etc. |
| X-Small | # kW | $### | $### |  |  |
| Small | # kW | $### | $### |  |  |
| Medium | # kW | $### | $### |  |  |
| Large | # kW | $### | $### |  |  |
| X-Large | # kW | $### | $### |  |  |

Appendix E: Self-Inspection Report Example

[STATE LOGO]

**Instructions**

The prompts in this self-inspection report are intended to collect key system installation characteristics, including photographs, which will allow [STATE] staff and contractors to conduct a reasonable due diligence review, as a substitute for an onsite inspection. This report includes a self-inspection checklist and a descriptive photograph sheet. **Installers wishing to complete a self-inspection must fill out all applicable fields, including all photos.** **Forms with missing information will be returned to the installer.** In cases where multiple pieces of equipment (e.g., two different types of PV modules) are used, please copy/paste the relevant information table and fill it out for both sets of equipment. Installers are encouraged, but not required, to attach an as-built electrical design drawing to this report.

Once completed, please submit this form in PDF format via [email] to [STATE EMAIL ADDRESS OR ONLINE PORTAL URL]

**System Information**

|  |  |
| --- | --- |
| **Grant Number** | #-### |
| **System Owner Last Name** |  |
| **Installation Company** |  |
| **Installer Last Name** |  |
| **Person Completing This Report** |  |
| **Phone** |  |
| **Email** |  |
| **Report Date** |  |

**Self-Inspection Checklist**

Array and PV Modules

|  |  |
| --- | --- |
| **Inspection Item** | **Value** |
| System Capacity (kWDC) |  |
| System Lifetime Energy Production (kWh) |  |
| TSRF(%) |  |
| Module Quantity |  |
| Module Manufacturer |  |
| Module Model Number |  |
| Modules per String (or per circuit for microinverters) |  |
| Number of Strings per Input Circuit |  |
| Conductor Size/Insulation Type |  |

Racking and Grounding

|  |  |  |  |
| --- | --- | --- | --- |
| **Inspection Item** | **Value** | | |
| PV Racking Manufacturer |  | | |
| Model |  | | |
| Grounding, If WEEBs (or equivalent) used, indicate number used per module. |  | | |
| Conductors supported and protected from damage. | Yes | No | N/A |
| All enclosures and splicing means rated for outdoor/wet location use (e.g., no indoor wire nuts). | Yes | No | N/A |
| All roof penetrations are properly flashed and sealed (note that sealant is a supplement, not a replacement, to flashing). | Yes | No | N/A |
| DC conduit labeled as containing PV circuits (NEC 690.31(D)(2)). | Yes | No | N/A |

Microinverter

|  |  |
| --- | --- |
| **Inspection Item** | **Value** |
| Quantity (enter 0 if not present) |  |
| Manufacturer |  |
| Model Number |  |
| Mount Type | Rack or Module Frame |
| Grounding | Microinverter bonding hardware or other |
| Inverter Breaker/Fuse Current Rating (A) |  |

Optimizer

|  |  |
| --- | --- |
| **Inspection Item** | **Value** |
| Quantity (enter 0 if not present) |  |
| Manufacturer |  |
| Model Number |  |
| Mount Type | Rack or Module Frame |
| Grounding | Optimizer bonding hardware or other |

Rooftop Junction Box (Copy and Paste if Multiple)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Inspection Item** | | **Value** | | |
| Number of Strings in JB | |  | | |
| Conductor Size/Insulation Type | |  | | |
| Enclosure rated for outdoor/wet location use. | Yes | | No | N/A |
| Conductors supported and protected from damage. | | Yes | No | N/A |
| Splice means rated for outdoor/wet location use (e.g., no indoor wire nuts). | | Yes | No | N/A |
| All roof penetrations are properly and sealed | | Yes | No | N/A |
| DC conduit labeled as containing PV circuits (NEC 690.31(D)(2). | | Yes | No | N/A |

Standalone DC Disconnect

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Inspection Item** | **Value** | | | |
| Max DC Ratings | Voltage | | Current | |
| Location |  | | | |
| DC disconnect located near inverter and readily accessible. | Yes | No | | N/A |
| DC characteristics label present (NEC 690.53). | Yes | No | | N/A |
| Disconnects all ungrounded conductors (note that ungrounded arrays must disconnect both positive and negative conductors). | Yes | No | | N/A |

String Inverter

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Inspection Item** | **Value** | | | | |
| Quantity (enter 0 if not present) |  | | | | |
| Manufacturer |  | | | | |
| Model Number |  | | | | |
| AC Conductor size/Rating |  | | | | |
| Inverter Type | Transformerless | | Transformer | | |
| Rapid Shutdown device | Inverter Integrated | | | Other | |
| If Other, enter manufacturer/model |  | | | | |
| Continuous grounding electrode conductor originates at designated inverter terminal. (Applicable for Transformer based inverters) | Yes | No | | | N/A |
| Inverter enclosure is grounded. | Yes | No | | | N/A |
| Integrated AC disconnect or External Disconnect within sight (10ft) | Yes | No | | | N/A |
| DC fuse rating (if combining 3 or more strings) | Voltage | Current | | | N/A |

AC Combiner

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Inspection Item** | **Value** | | | | |
| Max Enclosure Ratings (AC) | Voltage V | | | Current A | |
| Location (enter N/A for not present) |  | | | | N/A |
| Front panel included labels that identify each circuit (NEC 408.4(A)) | Yes | | No | | N/A |
| Combiner enclosure is grounded. | Yes | | No | | N/A |
| PV Disconnect ID label(s)/ AC characteristics label(s) present (NEC 690.54),706.15(C)). | | Yes | No | | N/A |
| Multiple sources & overcurrent device ratings warning label present (NEC 705.12(D)). | Yes | | No | | N/A |

AC Disconnect (Other than Interconnection) (Copy and Paste if Multiple)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Inspection Item** | **Value** | | | |
| Max Enclosure Ratings (AC) | Voltage | | Current | |
| Location (enter N/A for not present) | N/A | | | N/A |
| Disconnects all ungrounded conductors. | Yes | No | | N/A |
| Utility conductors connected to “Line” side of PV disconnecting means. | Yes | No | | N/A |
| PV disconnect identification label present (NEC 690.13(B)). | Yes | No | | N/A |
| Disconnect enclosure is grounded. | Yes | No | | N/A |
| AC disconnect door latch secured (NEC 690.15(A)) | Yes | No | | N/A |

See next page for continued form.

Interconnection (fill in one of the three sections below)

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Inspection Item** | **Value** | | | | | |
| **SUPPLY SIDE CONNECTION** | PV Service Disconnect Location |  | | | | | |
| Enclosure Rating | Voltage V | | Current A | | | |
| Fuse Rating | Voltage V | | Current A | | | |
| Conductor Size/Type | Line | | Load | | | |
| Utility conductors connected to “Line” side of disconnecting means. | Yes | No | | | N/A | |
| Interconnection wiring method compliant with NEC 230.43. | Yes | No | | | N/A | |
| Grounded conductor bonded to enclosure (NEC 250.24(C)). | Yes | No | | | N/A | |
| AC characteristics label present (NEC 690.54) | Yes | No | | | N/A | |
| AC disconnect door latch secured (NEC 690.15(A)) | Yes | No | | | N/A | |
| Directories/labeling present on all service disconnects per NEC 230.2(E), 230.70(B), 705.10, and 690.56(B). | Yes | No | | | N/A | |
| **FEEDER TAP CONNECTION** | Primary Source Overcurrent Device Rating (A) |  | | | | | |
| Existing Feeder Conductor Size/Type |  | | | | | |
| Main panel or subpanel Busbar Rating (A) |  | | | | | |
| Main panel or subpanel Breaker Rating (A)  (enter MLO if main lug only) | A | | | | | MLO |
| PV Disconnect Location |  | | | | | |
| Enclosure Rating | Voltage | | | Current | | |
| Fuse Rating | Voltage | | | Current | | |
| Conductor Size/Type | Line | | | Load | | |
| Utility conductors connected to “Line” side of PV disconnecting means. | Yes | No | | | N/A | |
| AC characteristics label present (NEC 690.54) | Yes | No | | | N/A | |
| PV disconnect identification label present (NEC 690.13(B)). | Yes | No | | | N/A | |
| AC disconnect door latch secured (NEC 690.15(A)) | Yes | No | | | N/A | |
| Directories/labeling present on all service disconnects per NEC 230.2(E), 230.70(B), 705.10, and 690.56(B). | Yes | No | | | N/A | |
| **LOAD SIDE CONNECTION** | Main Breaker Rating (A) |  |  | | |  | |
| Main Breaker Location | Top | Bottom | | | Other | |
| Backfeed Breaker Rating (A) |  | | | | | |
| Backfeed Breaker Location | Top | Bottom | | | Other | |
| Panel Busbar Rating (A) |  | | | | | |
| PV Conductor Size/Type |  | | | | | |
| Combined Rating of Other Current Sources (A)- |  | | | | | |
| Panelboard labeled to indicate presence of all power sources (NEC 705.12(C). | Yes | No | | | N/A | |
| AC characteristics label present (NEC 690.54) | Yes | No | | | N/A | |
| “Do not relocate” label present at PV breaker (NEC 705.12)(B)(3)(2). |  |  | | |  | |
| AC disconnect door latch secured (NEC 690.15(A)) | Yes | No | | | N/A | |
| Directories/labeling present on all service disconnects per NEC 230.2(E), 230.70(B), 705.10, and 690.56(B). | Yes | No | | | N/A | |

Photos Required (Multiple photos may be needed)

|  |
| --- |
| **Module Nameplate Photo** |
| Insert Photo(s) Here  Notes: |
| **Module Close-up Connector Mating/Compatibility Photo** |
| Insert Photo(s) Here  Notes: |
| **Full Array Image(s)**  **Multiple photos** may be needed to include all modules for verifying system capacity |
| Insert Photo(s) Here  Notes: |
| **Horizon Profile Photos**  From a single point near the middle of the either the bottom or top row of each array, start by pointing the camera to the left side of the array. Include a little of the array’s left edge, then take successive overlaping photos rotating to the right side of the array typically 4 or 5 photos per array. If more than one array, take another set if the array faces another direction not seen in the previous set. Identify the associated cardinal direction per set. (i.e. E, ESE, SE, SSE, S, SSW, SW, WSW, W, etc) |
| Insert Photo(s) Here  Notes: |
| **Array Mounting/Flashing Detail**  Close shot of mounting bracket connection to roof and associated use of flashing/sealant |
| Insert Photo(s) Here  Notes: |
| **Under-Array Wire Management**  **Close up** photo showing the wire management under each array. Multiple photos may be necessary |
| Insert Photo(s) Here  Notes: |
| **Module Clamping and Grounding**  Show typical grounding hardware installation, including ground rails, ground lugs, module clamping, and rail splices, if applicable |
| Insert Photo(s) Here  Notes: |
| **Microinverter Nameplate Photo** |
| Insert Photo(s) Here  Notes: |
| **Microinverter Mounting**  Show mounting method and mounting/grounding hardware |
| Insert Photo(s) Here,  Notes: |
| **Optimizer Nameplate Photo** |
| Insert Photo(s) Here  Notes: |
| **Optimizer Mounting**  Show mounting method and mounting/grounding hardware |
| Insert Photo(s) Here  Notes: |
| **Rooftop Junction and/or Combiner Box Wiring**  Show splice/termination method, conductor fittings |
| Insert Photo(s) Here  Notes: |
| **Cable/Conduit Runs** Show indoor and outdoor cable and/or conduit runs towards inverters, AC combiners, and/or raceways and troughs. **Include wiring of building penetration LB if presents** |
| Insert Photo(s) Here  Notes: |
| **Raceway/Trough Exterior**  Show labeling details, conductor fittings, and conduit runs towards inverters, AC combiners, disconnects  **Multiple photos may be needed** |
| Insert Photo(s) Here  Notes: |
| **Raceway/Trough Wiring**  Show wiring, splice/termination methods, grounding hardware, and/or conductor fittings |
| Insert Photo(s) Here  Notes: |
| **Standalone DC Disconnect Exterior**  Show nameplate/labeling details  **Multiple photos may be needed** |
| Insert Photo(s) Here  Notes: |
| **Standalone DC Disconnect Wiring**  Show wiring details |
| Insert Photo(s) Here  Notes: |
| **String Inverter Exterior**  Show sufficient detail to verify labeling |
| Insert Photo(s) Here  Notes: |
| **String Inverter Nameplate Photo** |
| Insert Photo(s) Here  Notes: |
| **String Inverter Wiring**  Show all wiring terminations |
| Insert Photo(s) Here  Notes: |
| **AC Combiner Exterior**  Show nameplate/labeling details |
| Insert Photo(s) Here  Notes: |
| **AC Combiner Front Panel**  Show front panel unique descriptive breaker/circuit ID. labeling |
| Insert Photo(s) Here  Notes: |
| **AC Combiner Wiring**  Show all wiring details and terminations |
| Insert Photo(s) Here  Notes: |
| **Production Meter Exterior**  Show production meter enclosure, nameplate ratings, and production reading  **Multiple photos may be needed** |
| Insert Photo(s) Here  Notes: |
| **Production Meter Wiring**  Show wiring of production meter enclosure  **Multiple photos may be needed** |
| Insert Photo(s) Here  Notes: |
| **Standalone AC Disconnect Exterior**  Show nameplate/labeling details |
| Insert Photo(s) Here  Notes: |
| **Standalone AC Disconnect Wiring**  Show all wiring details, nameplate, and terminations |
| Insert Photo(s) Here  Notes: |
| **Load Side Connection Main Service Panel Exterior (Door Open and Closed)**  Show labeling detail, Main breaker rating , System Backfeed Breaker |
| Insert Photo(s) Here  Notes: |
| **Load Side Connection Main Service Panel Wiring**  Show full wiring detail inside panel |
| Insert Photo(s) Here  Notes: |
| **Feeder Tap Connection**  Show feeder tap interconnection/splice connector detail |
| Insert Photo(s) Here  Notes: |
| **Feeder Tap Connection Disconnect Exterior**  Show labeling/nameplate detail |
| Insert Photo(s) Here  Notes: |
| **Feeder Tap Connection Disconnect Wiring**  Show all wiring, termination, nameplate, and fuse details |
| Insert Photo(s) Here  Notes: |
| **Feeder Tap Connection Load panel/Panel Disconnect**  Show labeling, nameplate detail, main breaker |
| Insert Photo(s) Here  Notes: |
| **Supply Side Connection Disconnect Exterior**  Show labeling/nameplate detail |
| Insert Photo(s) Here  Notes: |
| **Supply Side Connection Disconnect Wiring**  Show all wiring, termination, nameplate, and fuse details. Ensure neutral terminal and green ground bonding screw are visible |
| Insert Photo(s) Here  Notes: |
| **Supply Side Connection Main Service Panel Exterior and Nameplate Photo(s)**  Photo showing the busbar rating |
| Insert Photo(s) Here  Notes: |
| **Supply Side Connection**  Show service entrance conductor interconnection/spice connector detail, main/service OCPD  **Include images of genset / automatic transfer switches if present** |
| Insert Photo(s) Here  Notes: |
| **Interconnection Standalone Main Service Disconnect** |
| Insert Photo(s) Here  Notes: |
| **Balance of System (BOS) Overview Photos**  Show general location/configuration of DC disconnect, inverter, production meter, panelboards, and/or other co-located equipment, indoor and outdoor  **Multiple photos may be needed** |
| Insert Photo(s) Here  Notes: |
| **Balance of System (BOS) Utility Meter Photos**  Show location and nameplate of utility meter |
| Insert Photo(s) Here  Notes: |
| **Additional Photos** |
| Notes: |

Appendix F: …

1. [GGRF Implementation Framework](https://www.epa.gov/system/files/documents/2023-04/GGRF%20Implementation%20Framework_730am.pdf), pg. 3 [↑](#footnote-ref-2)
2. An eligible recipient is an organization that meets all of the following requirements: (a) is a non-profit organization; (b) is designed to provide capital, leverage private capital, and provide other forms of financial assistance for the rapid deployment of low- and zero-emission products, technologies, and services; (c) does not take deposits other than deposits from repayments and other revenue received from financial assistance provided using grant funds under this program; (d) is funded by public or charitable contributions; and (e) invests in or finances projects alone or in conjunction with other investors. [↑](#footnote-ref-3)
3. [SOURCE] [↑](#footnote-ref-4)
4. [SOURCE] [↑](#footnote-ref-5)
5. [SOURCE] [↑](#footnote-ref-6)
6. [SOURCE] [↑](#footnote-ref-7)
7. [SOURCE] [↑](#footnote-ref-8)
8. For reference, under this program, income eligibility is defined so that "Grant recipients must target benefits to households with low incomes. They may set their own LIHEAP income eligibility limits; however, they must cap those limits at (1) no more than the greater of 150 percent of the Federal Poverty Guidelines (FPG) or 60 percent of the State Median Income, and (2) no less than 110 percent of FPG." See weblink above. [↑](#footnote-ref-9)
9. For reference, income eligibility criteria for this program are available here: [SNAP Eligibility | Food and Nutrition Service (usda.gov)](https://www.fns.usda.gov/snap/recipient/eligibility). [↑](#footnote-ref-10)
10. For reference, under this program, households at or below 200% of the poverty income guidelines are considered eligible for weatherization services or if they receive [Supplemental Security Income](https://www.ssa.gov/ssi/) or Aid to Families with Dependent Children. In addition, each state or territory may elect to use the U.S. Department of Health & Human Services (HHS) [Low-Income Home Energy Assistance Program (LIHEAP)](https://www.acf.hhs.gov/ocs/programs/liheap) criteria of 60% of state-median income. See weblink above for additional details. [↑](#footnote-ref-11)
11. For reference, the income eligibility under the Lifeline program are 135% or less than the Federal Poverty Guidelines. See weblink above for additional details. [↑](#footnote-ref-12)
12. For additional information about income eligibility under this program, see [Income Eligibility Guidelines | Food and Nutrition Service (usda.gov)](https://www.fns.usda.gov/cn/income-eligibility-guidelines). [↑](#footnote-ref-13)
13. TSRF = Available insolation including shading and Tilt Orientation Factor / Total Insolation on location at the optimum tilt and orientation and with no shading [↑](#footnote-ref-14)
14. [Solar Energies Technology Office](https://www.energy.gov/eere/solar/federal-solar-tax-credits-businesses#_edn1), US Department of Energy [↑](#footnote-ref-15)
15. 26 U.S.C. § 48 & 48E. Projects must begin construction before January 1, 2025 to be eligible for the § 48 investment tax credit. Projects beginning construction on January 1, 2025 or later are only eligible for the § 48E Clean Electricity Investment Tax Credit (which is only available to projects placed in service after December 31, 2024). [↑](#footnote-ref-16)
16. See Section 10.1.6 (*Energy Community ITC Adder*) for additional details. [↑](#footnote-ref-17)
17. See Section 10.1.5 (*Low-Income ITC Adder*) for additional details. [↑](#footnote-ref-18)
18. 26 U.S.C. § 48(e) also offers an additional 20% points for projects classified as a “qualified low-income residential building project” or “qualified low-income economic benefit project,” which according to the most recent guidance from Treasury cannot be accessed for single-family homes. [↑](#footnote-ref-19)
19. Section 2601(2) of the Energy Policy Act of 1992 [↑](#footnote-ref-20)
20. Please see [Treasury’s most recent guidance](https://www.govinfo.gov/content/pkg/FR-2023-06-01/pdf/2023-11718.pdf) dated June 2023. [↑](#footnote-ref-21)
21. Please see [Treasury’s most recent guidance](https://www.govinfo.gov/content/pkg/FR-2023-06-01/pdf/2023-11718.pdf) dated June 2023 and this [unofficial FAQs answering questions relating to the NOPR prepared by CESA](https://www.cesa.org/wp-content/uploads/Low-Income-Communities-Bonus-Energy-Investment-Credit-Program-FAQs.pdf) and dated June 7, 2023. [↑](#footnote-ref-22)
22. Minority Business Enterprise, Woman Business Enterprise, Disadvantaged Business Enterprise [↑](#footnote-ref-23)