Solar For All List of Programmatic Functions

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# Goal

The Clean Energy States Alliance (**CESA**) produced this list of the programmatic functions that states may need when implementing Greenhouse Gas Reduction Fund Solar for All (**Solar for All**) programs. The list can help states:

1. **Clarify** which functions are needed and which are not for each program/sector;
2. **Evaluate** which functions to keep in-house vs. procure externally;
3. **Negotiate** with EPA with a clearer understanding of next steps.

Not all states and programs will require all the functions below, but this document presents a granular view for purposes of program development.

# How to use this document

This list is being shared as a Word document so that states can download and modify it as they see fit. To make this list relevant for your states, we recommend that you first duplicate it for each program you plan to launch. You can then use the columns to answer questions related to the budget available for an activity and to the existing state capacity to perform a function if that function is needed. When answering the capacity question, states should consider:

1. **Existing or anticipated state staff capacity** – **For example**: Will my team hire additional staff who could perform this function? Is there capacity somewhere else in the state infrastructure?
2. **Available assistance from partners or other “free” sources of assistance that can be expected** – **For example**: Can a nonprofit fit this role for free? Does free technical assistance from the federal government meet this need?
3. **Whether outsourcing the function will meet states’ goals** – **For example**: Is the state’s goal of developing market expertise in the private sector best served by performing this in-house? Is there an off-ramp for transitioning the marketing function to the private sector? Are there conflicts of interest that should be considered to ensure strong consumer protections?
4. **Whether third parties exist in or out of state that could take on some of these functions –** **For example**: If my state is a small solar market, how would I attract a private sector partner to deploy projects?
5. **Whether some of these functions can be coordinated with other states** – **For example**: Would my state benefit from using the same program administrator as my neighbor?

# Program planning phase

| WHAT?Activities / Description | HOW MUCH? SFA or other budget | WHO? Capacity |
| --- | --- | --- |
| Program design and overall management* Research and analyze different solar models across relevant sectors
* Run energy and financial modeling to answer basic questions about the program, including to set incentive rates, to evaluate how consumer savings will be defined, measured, and verified, and to assess risks for consumers and develop strategies to mitigate those risks
* Coordinate with other states and/or other GGRF recipients to leverage other federal funding, including evaluating tax credit monetization strategies
* Evaluate which program/sector will need pre-development technical assistance funding
* Identify potential staff training and educational needs
* Hire and manage relevant staff
* Produce program rules
 | [*For example: “$5,000 for energy modeling can be used.”*] | [*For example: “Borrow expert from XX’s team for four weeks. Ask CESA to review initial design. Identify a state with a similar program. XYZ will be hard to do in-house so consider third party expert.”*] |
| General program operations* Establish governance structure and investment decision-making structure, including community input and investment committees as relevant
* Set up sub-awardee partnership structures, including re. workforce development
* Develop compliance/enforcement mechanisms, including evaluating necessary processes relevant to customer protection and internal controls
* Plan data collection and map data flows (emissions reductions, capacity deployed, funding deployed, jobs created, other) in preparation for EPA reporting and state-run program evaluation
* Design and deploy, and/or update a consumer onboarding platform, possibly including savings evaluation tools to assist decision-making
* Set up processes to verify income and ensure data safety and privacy
 |  |  |
| Legal support* Support subaward and procurement processes
* Evaluate and implement tax credit monetization strategies
* Analyze how the state will meet federal requirements (BABA, DBA, NHPA, etc.) at the program level
* Evaluate legal counsel needs for individual transactions documentation (e.g., if involved directly in project financing)
* Draft contracts and project documentation
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| Stakeholders' outreach and engagement* Design engagement plan
* Start outreach process
	+ To all stakeholders for awareness
	+ To specific groups such as public housing authorities, private/nonprofit owners of affordable housing, utilities, and community-based organizations
* Design and produce communication tools and branding – websites, flyers, banners, radio, other collateral, etc.
* Host public meetings and roundtables
* Hire and train community navigators/ambassadors
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| Workforce development program * Engage with unions and apprenticeship programs
* Engage with contractors and develop training capacity to market programs
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| Financing * State Revolving Fund (SRF)
	+ Evaluate existing SRF structures and partners
	+ Design the application and underwriting process, process to service loans, etc.
* Solar lending and credit enhancements
	+ Evaluate whether the state has direct lending capacity within existing state infrastructure – lend to lenders vs. lend to consumers vs. both
	+ Discuss interest of local lenders to engage in this market across relevant sectors (single family, multifamily, community solar)
	+ Evaluate gaps and needs to foster activities that will build the market and attract private investment in relevant sectors
* Third-party ownership
	+ Evaluate feasibility and barriers
	+ Evaluate market support needs to reach lease/PPA prices that create meaningful savings
* Evaluation of other federal funding leverage opportunities
	+ Evaluate in-state tax credit maps and criteria and compare eligibility requirements across federal and state programs
	+ Coordinate with weatherization and housing offices as well as with DOE/EPA/USDA to assess feasibility of co-funding programs/projects or braiding within program constraints
	+ Map LMI customer journey through weatherization, solar, storage, electrification programs
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| Marketing* Design strategy to source projects and market incentives and financing programs with developers, building owners, banking sector, utilities and communities as relevant
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| Other* Engage with the legislature and other relevant regulatory authorities for policy/legal adjustment to existing programs or regulations necessary to enable GGRF Solar For All program rules
* Develop RFP templates for contractors
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# Program implementation phase

| WHAT?Activities / Description | HOW MUCH? SFA or other budget | WHO? Capacity |
| --- | --- | --- |
| General program administration * Manage consumer onboarding platform and savings evaluation tools update, as relevant
* Manage income verification and ensure compliance with data safety and privacy rules
* Verify eligibility of technology for program enrollment
* Vet and train contractors
* Inspect projects
* Process bills and payments
* Integrate data with utility IT system as needed
* Analyze data
* Automate processes
* Coordinate with WAP/LIHEAP program teams
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| Online marketplace* Educate consumers
* Manage savings evaluation tool and assist consumers’ decision-making
* Vet contractors and connect contractors and potential customers
* Manage and update tools to find incentives including:
	+ Maintain web infrastructure
	+ Input and maintain data
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| Marketing and communications* Market programs and build projects pipeline
	+ Source projects and business development activities
	+ Coordinate statewide marketing
	+ Manage and coordinate Solarize campaigns
	+ Manage community solar subscription
	+ Evaluate use of AI tools to facilitate project identification
* Communications
	+ Engage with the public (social media, in-person events, etc.)
	+ Maintain current information in communication channels
	+ Train community navigators and receive and offer feedback
	+ Translate relevant program documentation
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| Financing* Manage funds
* Manage in-house lending or other SRF
	+ Manage application and underwriting process
	+ Service loans
* Manage asset/portfolio (if needed)
* Monetize RECs (if needed)
* Inspect and spot check and bills (if third-party managed)
* [Add other as relevant to your financing program structure]
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| Technical assistance* Offer direct technical assistance for specific segments like multifamily (especially public housing authorities)
* Manage technical assistance program and funds managed by third-party engineering firms
* Maintain database of relevant firms, resources, and projects
* Coordinate with marketing teams and seek to leverage other federal funding opportunities
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| Workforce development* Implement workforce development program
* Launch new apprenticeship programs
* Manage relationship with unions or trade groups, and the Department of Labor (federal and state)
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| Continuing program evaluation and improvement* Survey program beneficiaries, contractors, and utilities
* Evaluate performance indicators and propose improvements to program design or innovations in implementation
* Evaluate lifecycle cost of capital, capital mobilization, and strength of savings for each program
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| Grants management* Maintain compliance with Uniform Grant Guidance (OMB’s Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards to Non-Federal Entities guidance in 2 CFR 200 as supplemented by 2 CFR 1500)
* Report to EPA
* Implement oversight and fraud prevention processes
* Manage accounting according to state and federal rules
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# Program-long activities for efficiencies and learning

| WHAT?Activities / Description | HOW MUCH? SFA or other budget | WHO? Capacity |
| --- | --- | --- |
| Coordination with other states and interstate learning* Convene with other states and participate in working groups to tackle shared challenges and opportunities and create program efficiencies
* Develop and share best practices and case studies
* Produce feedback on program models and financing structures
* Develop resources (templates, guides, and tools) to support program design and implementation
* Develop explainers about federal requirements for state staff
* Coordinate opportunities for technical assistance to states and other GGRF recipients
* Participate in direct multi-state technical assistance projects
* Participate in trainings and skills-based activities with other GGRF recipients
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| [Add other as relevant] |  |  |