



**Approved Vendor
Stakeholder Meeting
Oct 10, 2018**

Agenda

Welcome & Introductions – 1:00-1:15

- a. Introduction of Presenters
- b. Meeting format and guidelines for webinar and telephone attendees

Approved Vendor Requirements – 1:15-2:00

- a. Overview of Draft Approved Vendor Requirements
- b. Brief description of Approved Vendor portal and online application process
- c. Approved Vendor Requirements Questions & Comments

Brochure for Adjustable Block Program – 2:00-2:45

- a. Importance of Adjustable Block Program Brochure to solar consumers
- b. Overview of Brochure contents
- c. Brochure Questions & Comments

Disclosure Form – 2:45-3:35

- a. Overview of Disclosure Forms
- b. Discussion of differences between Disclosure Forms:
 - PV System Purchase Form
 - Power Purchase Agreement Form
 - Lease Disclosure Form
- c. Disclosure Form Questions & Comments

Marketing Material & Marketing Behavior – 3:35-4:30

- a. Significance of standardized marketing material for the Adjustable Block Program
- b. Presentation of marketing material requirements
- c. Marketing Material Questions & Comments

Closing Comments – 4:30-5:00

- a. Recap of key meeting points
- b. Next steps and other aspects in the Adjustable Block Program implementation
- c. Other program aspects Questions & Comments

Adjourn – 5:00

Meeting Format

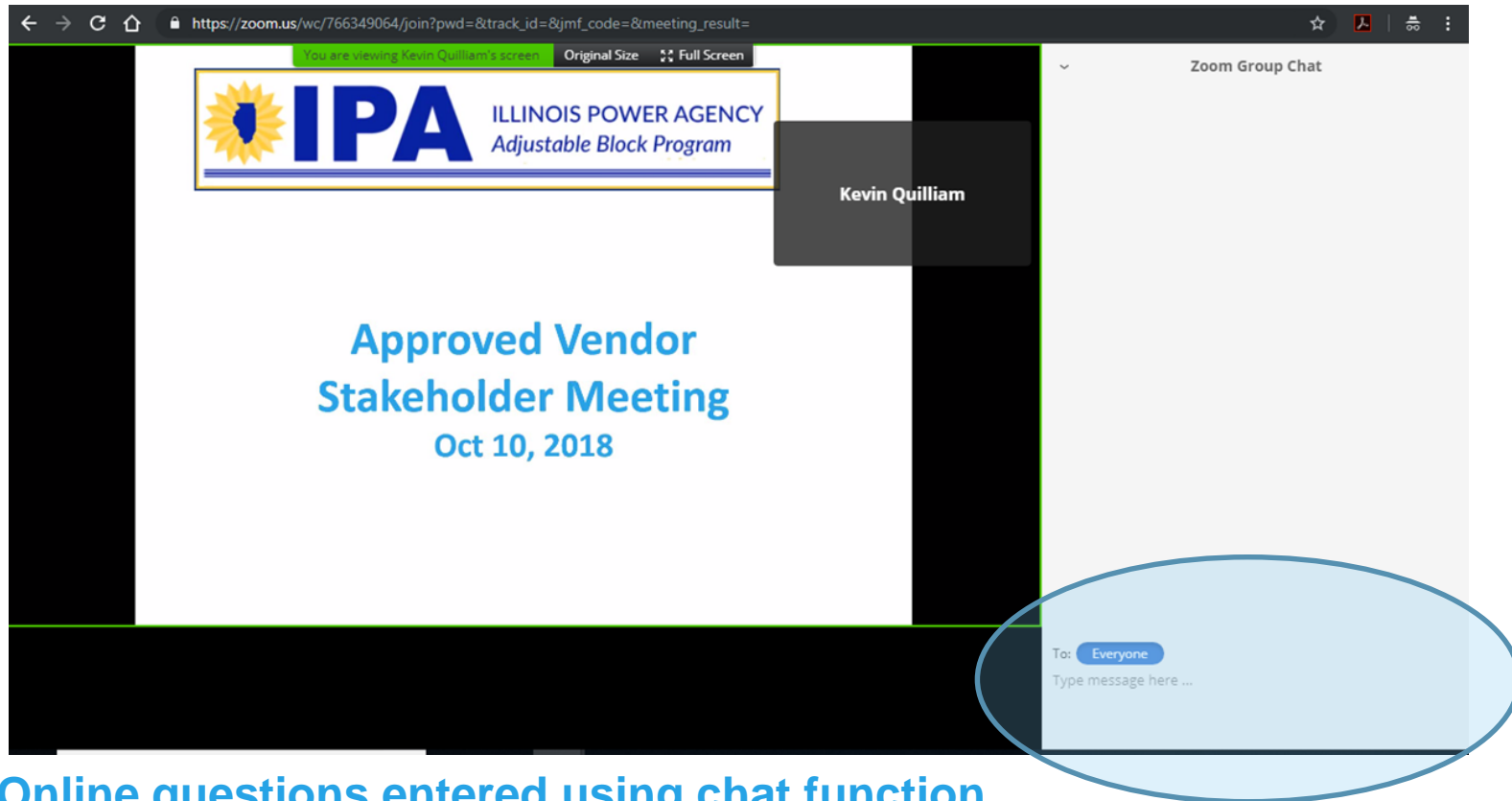
- Short presentation by topic followed by questions & comments on topic
- Combined online and in-person questions and comments



- Online questions entered using chat function
 - First click chat icon at the bottom of the screen (may require you hover mouse pointer over the bottom of the screen)

Meeting Format

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The screenshot displays a Zoom meeting interface. The main content area shows a presentation slide with the IPAA logo (ILLINOIS POWER AGENCY Adjustable Block Program) and the text "Approved Vendor Stakeholder Meeting Oct 10, 2018". A name tag for "Kevin Quilliam" is visible. On the right side, a "Zoom Group Chat" window is open, showing a "To: Everyone" header and a "Type message here ..." input field, which is circled in blue. The browser address bar at the top shows the Zoom URL: https://zoom.us/jc/766349064/join?pwd=8ttrack_id=8jmf_code=&meeting_result=

- Online questions entered using chat function
 - First click chat icon at the bottom of the screen (may require you hover mouse pointer over the bottom of the screen)
 - Chat screen will pop up where questions can be typed
- Administrator or IPA staff will read all online and repeat all in-person questions

Stakeholder Process

- Stakeholder document was released Wednesday, Oct 3rd
- Stakeholder meeting Wed, Oct 10th
- Comments taken at comments@illinoisabp.com
 - Approved Vendor requirements comments due Oct 19th at 5:00 PM CDT.
 - Brochure, disclosure, & marketing standards due Oct 26th at 5:00 PM CDT.
- Comments posted at illinoisabp.com. If comments contain confidential or private information, a redacted copy must also be provided for public posting.

Program Administrator and IPA staff will review comments and release the final guidebook sections at www.illinoisabp.com


Stakeholder Process

Notes:

- Please restrict questions & comments today to these topics. The administrator will be happy to answer any questions about other issues at via email at admin@illinoisabp.com or via telephone at (877) 783-1820
- This process covers distributed generation only.
- Two future stakeholder processes will cover
 - (1) community solar requirements & consumer protection and
 - (2) all other program guidelines
- Please follow up with an email with any comments you make during the presentation today
- All comments received will be made publicly available unless the commenter specifically requests confidential treatment and submits a confidential and redacted version.
- A recording of this presentation and a copy of the slides will be available shortly after the meeting concludes at www.illinoisabp.com

Approved Vendor Requirements

Online Approved Vendor Application Portal

 ILLINOIS POWER AGENCY
Adjustable Block Program

INFORMATION VENDORS VENDOR ADMIN

Welcome KEVIN

Approved Vendor Application

[Return to Vendor Application Dashboard](#)

Vendor Contact Information

Completed

[Use my contact information >](#)

Legal Business Entity Name REQUIRED

Doing Business As ("DBA") Name REQUIRED

Principal Place of Business

Street REQUIRED

Apartment or Suite

City REQUIRED

State REQUIRED

Zip REQUIRED

Enter five digit zip code (12345) or five digit code with four digit extension (12345-6789)

Primary Point of Contact

Name REQUIRED

Phone REQUIRED

Enter 123-123-1234 with no extensions allowed

Email REQUIRED

[Save and Continue](#)

Contact Us

Tel	(587) 287-1903
Email	admin@illinoisabp.com

Company Background

Completed

[Revisit](#)

Brochure

Intended to provide basic consumer information in easy to understand format

- Required to be provided at first sales contact with customer and contract signing
- Would be self-printed by Approved Vendors
- Standard program-wide brochure, not specific to any single Approved Vendor

Discussion item: Require either customer sign-off that they received brochure or Approved Vendor attestation that brochure was provided?

Disclosure Form

Intended to allow consumers to make “apples to apples” comparison of offers.

- Forms for Owned, Leased, and PPA systems
- These standard forms can only be completed at the illinoisabp.com portal. Calculations will be made by portal
- Required at contract signing with customer
- Can be emailed from portal to customer for e-signature or printed, signed by customer, and uploaded as part of the application procedure
- All information required for disclosure form will be transferred to the application to avoid double entry of data

Discussion items: How to account for changes between initial contract and final completed project?

Specific contract guidelines needed that are not in disclosure?

Marketing Material Guidelines

Intended to provide Approved Vendors the standards for marketing material and marketing behavior

- Approved Vendors will be able to upload marketing materials into portal for review at any time.
- Copy of each Approved Vendor's approved marketing materials will always be available in portal.
- IPA intends to periodically check vendors' marketing behavior, both spot checks & in response to complaints
- Program brand will be released before launch

Discussion item: Should standard training be required for all sales personnel on the program and marketing guidelines?

Comments to *comments@illinoisabp.com*

Approved Vendor Registration Requirements by 5:00 PM CDT Oct 19, 2018

Consumer Protection Documents by 5:00 PM CDT Oct 26, 2018

All comments received will be made publicly available unless the commenter specifically requests confidential treatment and submits a confidential and redacted version.