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Illinois Power Agency
Program Guidebook Update
Request for Comments - August 6, 2020

This group of Approved Vendors and Subscriber Organizations, representing a significant portion of the projects selected for the community solar program, greatly appreciates the IPA's request for feedback on the Program Guidebook and its continued commitment to improving the functionality of the Adjustable Block Program. These comments are reflective of the undersigned parties' beliefs on how a modified customer disclosure form and process can serve as an adequate form of customer protection while allowing a flourishing community solar market, like those we participate in across the country.

Among other things, the Program Guidebook at issue in this proceeding, details the process of a customer submitting a disclosure form. Importantly, the content of the disclosure form follows the IPA's Community Solar Marketing Guidelines, and updates to these Marketing Guidelines are currently being discussed in an open stakeholder comment proceeding. We would like to be mindful of these concurrent proceedings, and as such, reiterate four points previously raised by the individual companies for the IPA to understand the undersigned consensus as it relates to the disclosure form.

Given the collective experience in other states, we agree that a few changes to the disclosure form and the process of creating and executing disclosure forms will enhance the customer experience, preserve consumer protection, and enable Approved Vendors and their designees to subscribe customers to Illinois projects.

1. Approved Vendors and their designees need the ability to generate and execute the disclosure form outside the portal along with the customer agreement.
2. The use of *To Be Determined* ("TBD") for project-specific inputs and Approved Vendor information on the disclosure form since the project assignment and the Approved Vendor may change between the time of origination and project assignment.
3. Allow Approved Vendors and their designees to communicate the assigned project information to the customer via email prior to energization.
4. Prior to energization, require that Approved Vendors upload the signed disclosure forms with "TBD", as described above, and transmit final information related to the project and Approved Vendor to InClima via manual entry or API in the portal.

Generating the disclosure form outside of the portal using the existing template would allow customers to enroll in one electronic signing process. Generating forms within the ABP portal is not required to ensure customer protection, prevents effective and timely customer acquisition, and will lead to fewer community solar program sign-ups and therefore fewer viable projects. A seamless onboarding experience for the customer generally entails contract execution on a single platform without the need for a separate email with instructions to execute the disclosure form from a sender different than the Approved Vendor or its designee. Segmenting the enrollment process by signing the disclosure form separate from the customer agreement is unique to Illinois

and will impact the rate of customers signing up for the program and create greater customer confusion. Sending a separate email with the disclosure form has the appearance that the customer is signing up twice, the customer is receiving spam, or a variety of fraudulent concerns. All other markets allow the community solar provider to include the disclosure form with the customer agreement when presented to the customer for execution. Furthermore, Approved Vendors, after receiving a signed contract from the customer, must monitor the status of the disclosure form within the portal, and manage follow-up correspondences with the customers in order to fully enroll the customer. Some customers become frustrated with the Approved Vendor and disengage from the sign-up process to no fault of the Approved Vendor.

We agree with the IPA that presenting the customer with the disclosure form early in the sign-up process creates a better customer experience, however, we request consideration of a few modifications to the disclosure form. **As we each stated in individual company comments on the Marketing Guidelines, the IPA should pre-approve any disclosure form that includes “TBD”, a schedule of projects and/or a schedule of Approved Vendors (and otherwise matches the standard form), irrespective of whether such form is created within the ABP portal.**

The use of “TBD” has been demonstrated to be effective in other states with more mature community solar markets. Massachusetts, Minnesota, and New York require disclosure forms, but the project name is not required at the time of customer sign-up.¹ “TBD” can be used until the customer is assigned to a specific project, at which time the community solar provider would use existing communication channels to inform the customer of their assigned project with time estimates on when the project will begin producing energy and the start of bill credits. In these other markets there are no requirements to have customers re-execute disclosure forms when the project is ultimately assigned. This process is successful because the customer sign-up is complete when the customer agreement and disclosure form are executed, without the need for either party to re-execute the disclosure form when the specific project is assigned. It is clearly indicated to customers through marketing communications that we will do everything we can to assign them to the next available project that works for their subscription.

Our experience shows that customers are attracted to community solar for energy cost savings and to support local renewable energy. While many customers appreciate the connection to a specific, tangible, in-state community solar project, our experience is that the exact project which they participate in is not important in their decision to subscribe. Communicating the project information and the Approved Vendor information after origination should not affect the value proposition of community solar in Illinois.

Instead, during the initial sign-up process, Approved Vendors can share basic information about the types of projects in their portfolio without disclosing a specific project name or a list of

¹ See *Instructions for Preparing New York Community Distributed Generation Disclosure Form #8* “If the customer has not been assigned to a specific project at the time the form is provided, the customer must be contacted when the customer is assigned to the project and provided information on the project location, the final allocation, and the expected in-service date.”; Massachusetts uses the “Credit Allocation Form” prior to energization which assigns customers to the project.; Minnesota projects are assigned after origination once the utility validates the account.

projects on the disclosure form, and then at energization, Approved Vendors can communicate the details of the project through e-mail or mailed communications without any changes to the disclosure form. What is most important to the customer is that they are ultimately assigned to a project which will generate net metering credits and help them achieve their savings and sustainability goals.

Assuming the use of “TBD” for project information and Approved Vendor information is permitted, Approved Vendors or their designees would transmit the disclosure form data fields into the portal manually or through API. The Program Administrator will have all of the necessary information in the portal prior to energization. There are a variety of changes that may occur between the time of origination and project assignment, such as project timelines change, Approved Vendors acquire projects, or customers cancel. Entering the information into the portal at the time of project assignment would improve the portal record keeping by alleviating the need for a new disclosure form, and duplicative records, if the Approved Vendor or project changes in the normal course of business. Entering the customer record in the portal at the time of project assignment would avoid the administrative work needed to preserve the data integrity of the portal when transferring customers between projects and deleting customer records for those that cancel.

We urge the IPA to implement Marketing Guidelines and a Program Guidebook that allow for the type of flexibility in the disclosure form and process we have laid out in these comments. There is significant consensus within the industry that these practices balance the need to provide sufficient consumer protection while also ensuring a thriving community solar market in Illinois for many years to come. It is critical that any changes to the Marketing Guidelines and Program Guidebook be implemented as soon as possible, as there are many Approved Vendors already signing up customers for projects that are coming online, or online soon.

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