



## Inclusive Shared Solar Initiative (ISSI) Request for Proposals (RFP) for ISSI State Implementation Partners<sup>1</sup>

### **Summary**

**Eligibility:** State Energy Offices<sup>2</sup> in partnership with LIHEAP Offices<sup>3</sup> in the U.S. States, Territories, and the District of Columbia. State Energy Office applicants can apply for one of two categories: (1) technical and financial assistance or (2) technical assistance only. State Implementation Partners requesting financial assistance will enter into a contract agreement with the National Association of State Energy Officials (NASEO) utilizing available federal funding and follow a detailed budget and scope of work to be developed in partnership with NASEO, and the terms and conditions of NASEO's funding.

**Project Period:** February 1, 2021 – March 31, 2022. Two project evaluation decision meetings with NASEO staff will be required by April 1, 2021 and October 1, 2021 to assess project progress and determine the need for an extension and/or expansion of the contract.

**Optional Webinar for Prospective Applicants:** Tuesday, November 24th, 2020, 1-2 PM Eastern time. Register at <https://register.gotowebinar.com/register/1354157831257904654>. A recording will be made available to anyone who registers.

**Proposal Deadline:** Thursday, December 10, 2020, 5 PM Eastern Time. Only one proposal per state will be considered and must be received from the State Energy Office, with the demonstrated support of, the State Energy Office Director and LIHEAP Office Director. Please see below for further submission information.

**Potential Applicant Interviews:** NASEO may invite applicants to participate in a 30-minute phone interview to clarify and answer questions about their submission. These interviews are likely to take place in early- and mid-December 2020.

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<sup>1</sup> This Request for Proposals does not obligate NASEO to award a contract. NASEO reserves the right to cancel all or part of this solicitation. All costs incurred in responding to this Request are the responsibility of the respondent.

<sup>2</sup> For the purposes of this RFP, "State Energy Office" is defined as the agency designated to oversee U.S. State Energy Program funds.

<sup>3</sup> For the purposes of this RFP, "LIHEAP Office" is defined as the agency designated to oversee funding and programs under the Low Income Heating Energy Assistance Program (LIHEAP).

**State Implementation Partner Selections:** Anticipated by January 8, 2021. Following selection, partners must submit a detailed budget and scope of work and execute a contract agreement with NASEO, prior to commencing work.

**Contacts:** Sam Cramer, Program Director, NASEO, [scramer@naseo.org](mailto:scramer@naseo.org), 703-299-8800x111 and Cass Lovejoy, Project Manager, National Energy Assistance Directors Association (NEADA), [clovejoy@neada.org](mailto:clovejoy@neada.org), 202-333-5916

**Assistance Available to State Awardees:** Participating states or territories can receive numerous benefits from participating in this initiative, including:

- Financial support for states (up to \$90,000 per state) to support staff time and expenses (please note on your application whether you intend to apply for financial and technical assistance, or technical assistance only);
- Access to NASEO and NEADA staff time and expertise and national subject matter experts; and
- Access to other states and organizations to identify and adapt best practices and share lessons learned.

**Expected Outcomes:** By the end of this initiative, participating states will have:

- Engaged stakeholders, developed plans, and overseen the launch of at least two pilot community solar projects using innovative financing and support mechanisms to increase access for low- to moderate-income (LMI) subscribers;
- Participated in meetings with financial institution(s) (to be convened by NASEO and NEADA) to discuss innovative strategies for expanding LMI access to community solar.
- Shared their experiences and findings with other states and partners interested in LMI community solar through the ISSI Peer Exchange Group and through NASEO and NEADA-hosted conferences and meetings.

## **Background**

This RFP seeks State Implementation Partners as part of the Inclusive Shared Solar Initiative (ISSI), a partnership between NASEO<sup>4</sup> and NEADA<sup>5</sup>. ISSI aims to advance strategies that increase the representation of Low-to-Moderate Income (LMI) community solar programs through targeted State Energy Office and LIHEAP Office engagement, involvement, and coordination, and through the leveraging of LMI energy programs and resources.

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<sup>4</sup> NASEO is the only national non-profit association for the governor-designated energy officials from each of the 56 states and territories. Formed by the states in 1986, NASEO facilitates peer learning among state energy officials, serves as a resource for and about state energy offices, and advocates the interests of the state energy offices to Congress and federal agencies. For more information, visit [www.naseo.org](http://www.naseo.org).

<sup>5</sup> NEADA is the primary educational and policy organization for the state directors of the Low-Income Home Energy Assistance Program (LIHEAP). LIHEAP is a federal program providing formula grants to states to help low-income families pay their heating and cooling bills. For more information, visit [www.neada.org](http://www.neada.org).

The basis for ISSI lies in part in the New York Solar for All program, which is designed to provide free access to community solar facilities for low-income households. New York's program accomplishes this by providing community solar developers with guaranteed payments on behalf of a set number of low-income participants, essentially making the low-income population the "anchor tenant" for each project.

ISSI proposes to expand, replicate, and refine the Solar for All model to other states. ISSI will facilitate information and knowledge transfer from the New York Solar for All program to other states, and thus deliver the benefits of more affordable and accessible community solar to more underserved populations. By the end of the ISSI project, NASEO and NEADA expect to:

- Have supported at least three State Implementation Partners in developing at least six new community solar frameworks (two in each state); and to
- Have created greater momentum among state governments, community solar developers, and the finance community in scaling and investing in LMI community solar projects.

For additional information on both the New York Solar For All program, as well as potential funding and financing models for community solar, please visit the [ISSI](#) and the [New York Solar For All](#) websites.

### **Expected Project Activities and Commitment**

The success of an initiative such as ISSI requires the commitment and active participation from dedicated staff within the partner state agencies. While there is opportunity to custom-tailor each state's pathway to achieve the expected outcomes, the selected state partners will be expected to participate in the following activities. NASEO and NEADA, as partners, will provide technical assistance, template materials and resources, and connections to experts to support state partners' efforts.

1. The development of a draft State Implementation Plan that lays out the process by which the state will design and develop LMI community solar pilot projects, including identification of funding sources for the pilot projects and innovative strategies to qualify, recruit, and enroll LMI subscribers;
2. A kickoff meeting with key in-state stakeholders to introduce and collect feedback on the State Implementation Plan;
3. The finalization and release of the State Implementation Plan;
4. The development and execution of a Request for Proposals (RFP) to solicit proposals from solar developers to establish LMI community solar projects, line with the State Implementation Plan;
5. Execution of contracts with selected RFP respondents, and oversight of the project in line with the State Implementation Plan;
6. Participation in peer exchange meetings with other states and key stakeholders (to be completed in conjunction with NASEO or NEADA events); and

7. Check-ins with NASEO and NEADA staff to provide updates on progress and identify technical assistance needs.

## **Support**

NASEO and NEADA will provide the following support for selected state participants:

- If needed, financial support for states (up to \$90,000 per state) to support staff time and expenses;
- Access to NASEO and NEADA staff time, connections to experts, and template materials to support community solar developer engagement and project development;
- Access to national subject matter experts for calls and webinars to discuss potential solutions to barriers to pilot program implementation; and
- Access to other states and organizations to exchange best practices and share lessons learned.

## **Proposal Process**

**Proposal Eligibility:** This opportunity is open to all State Energy Offices and LIHEAP Offices in the U.S. states, commonwealths, territories, and the District of Columbia.

**Interested Applicants' Webinar/Conference Call:** NASEO and NEADA will host an optional webinar or conference call for interested state applicants on Tuesday, November 24, 2020, 1-2 PM Eastern time. The purpose of the webinar is to provide clarifications about the requirements of this Request for Proposals (RFP) and the ISSI project. During the webinar, participants can ask questions about proposal content, criteria, and process. To participate in the optional webinar, please register at this link:

<https://register.gotowebinar.com/register/1354157831257904654>.

**Submission Information:** All proposals must be received by Thursday, December 10, 2020 at 5:00 p.m. Eastern time. Only one proposal per state will be considered, and we highly encourage joint submissions by the State Energy Office and LIHEAP Office. Prior to submission, all of the state's proposal materials must be assembled into a single PDF document. Please assemble all proposal materials into one PDF document and email it to Sam Cramer of NASEO at [scramer@naseo.org](mailto:scramer@naseo.org).

**Selection of States:** NASEO and NEADA will review the state applications that are submitted and select up to three states to receive financial support to participate in ISSI. The number of states receiving technical assistance only will be determined after applications are submitted.

## **Proposal Criteria**

The following is a summary of the required proposal content and scoring values assigned to each section for the selection process. Each proposal can receive up to 100 points. The

proposal narrative should not exceed eight (8) pages single-spaced, 11-point font, using Arial or Calibri font and 1-inch margins (excluding the cover sheet).

**Cover Sheet (Required):** The cover sheet should identify the state and team leader's contact information, including his or her title, agency, mailing address, telephone number, and email address. The cover sheet does not count toward the page limit.

**Letters of Support (Required):** Applicants must provide letters of support from the Director of the State Energy Office and the Director of the LIHEAP Office. The letters must demonstrate a commitment to executing the project proposal in the application. Letters of support do not count toward the page limit.

**Need for/Impact of Financial and TA Support (10 points)**

1. Describe your agency's(ies') need for support in expanding LMI households' access to community. Please specify whether you seek:
  - a. Financial and Technical Support
  - b. Technical Assistance Only
2. Please list the key activities and/or challenges for which you are seeking support.

**Community Solar Program Basics (35 points):**

1. Please describe the existing infrastructure for community solar programs in your state, including enabling law(s), existing programs, and existing funding. In particular, describe:
  - a. Permitted ownership structure(s)
  - b. Program administrator(s), including key role(s) and responsibility(ies)
  - c. Administration of and mechanism(s) for bill crediting
  - d. Target participants
  - e. Role(s) of the utility
  - f. Subscription, transfer, and un-subscription processes
  - g. Integration and ownership of market-based clean energy credits, such as Renewable Energy Credits (RECs)
  - h. Subscriber protections
  - i. Supports for LMI participation
  - j. Funds allocated or potential sources of funding/financing for project development and implementation
  - k. Any other information you believe would be relevant to participating as an ISSI State Implementation Partner
2. Please describe potential opportunities to leverage state funding sources to solicit pilot projects. The creative use of existing funding sources (LIHEAP, public benefit charges, etc.) is encouraged.
3. Does your state have complementary programs or legislation in place (i.e. net metering, virtual net metering, incentives, financing, interconnection rules) that can support community solar project development? If so, please describe.
4. Provide data on the current state of play of community solar development in your state: are there operational projects (if so, how many, where, and what is their generation

profile), what are key challenges, what are the demographics of program participants, how are the projects operated and owned).

### **LMI Access to Community Solar (35 points)**

1. For states with existing programs:
  - a. What are current participation rates of LMI subscribers in your community solar programs?
  - b. Please describe the customer qualification and enrollment process. Is responsibility for subscriber enrollment with developers, or another entity(ies)? What form(s) of proof must prospective subscribers provide to be deemed eligible? Are any components required by statute?
  - c. What is your target for LMI participation? What data and analysis is this target based on?
  - d. What are the key challenges in your state hindering greater LMI participation and how do you plan on overcoming them?
  - e. Has your office conducted an assessment of potential host sites for community solar projects that can serve LMI or underserved communities?
  - f. Specify any plans your state has to engage underserved or underrepresented communities and people in your state.
2. For states without existing programs:
  - a. What level of LMI participation would you like your planned community solar projects to achieve and how will you achieve them?
  - b. Please describe your plans for customer qualification and enrollment. Is responsibility for subscriber enrollment with developers, or another entity(ies)? What form(s) of proof must prospective subscribers provide to be deemed eligible? Are any components required by statute?
  - c. What do you foresee may be challenges to achieving this level of LMI subscriber participation and how will you overcome them?
  - d. Has your office examined potential host sites for projects? If so, please share more information about the sites and the analysis used to identify them.
3. How will the State Energy Office and LIHEAP Office collaborate to support community solar projects (i.e., qualifying and enrolling subscribers, co-funding, etc.)?

### **Ability to Execute Expected Project Activities (20 points)**

1. If seeking financial assistance:
  - a. Is your office permitted and able to enter into a contract with NASEO detailing the project activities and budget, and to receive funds?
  - b. Is your office able to contribute cost share, from non-federal sources, in the amount of 20% of total project costs?
2. Is your office permitted and able to negotiate directly with community solar developers?
3. Is your office permitted to issue RFPs and enter into contracts for community solar projects?

<b>Category</b>	<b>Score Weight</b>
Need for/Impact of Financial and TA Support	10 points
Community Solar Program Basics	35 points
LMI Access to Community Solar	35 points
Ability to Adopt and Adapt New York Solar For All Program	20 points
<b>Maximum Score</b>	<b>100 points</b>