

Appendix 1

State of the Program: Illinois Solar for All

Legislative History

The Illinois Solar for All Program (“ILSFA”) was created in 2017 through revisions to Section 1-56(b) of the Illinois Power Agency Act (“IPA ACT”) contained in P.A. 99-0906 (colloquially known as the Future Energy Jobs Act or “FEJA”). ILSFA initially had four sub-programs: (A) Low-Income Distributed Generation, for on-site solar projects; (B) Low-Income Community Solar, for off-site solar projects; (C) Incentives for Non-Profits and Public Facilities, for on-site projects; and (D) Low-Income Community Solar Pilot Projects, with distinct rules and incentives.

Through the enactment of P.A. 102-0662 (colloquially known as the Clean Energy Jobs Act or “CEJA”), the Low-Income Community Solar Pilot Project Program was struck from ILSFA and split the Low-Income Distributed Generation sub-program into separate sub-programs for distributed generation projects serving small residential (single- to – four-unit residences) and large residential (five units or more) buildings. Currently, the ILSFA sub-programs authorized under Section 1-56(b)(2) of the IPA Act are:

- (A) Low-Income Single-Family and Small Multifamily Solar
- (B) Low-Income Community Solar
- (C) Incentives for Non-Profits and Public Facilities
- (D) Low-Income Large Multifamily Solar

These updated sub-programs were rebranded with participant-friendly names and were announced when Program Year 2022-2023 opened in August 2022:

- (A) Illinois Solar for All: Residential Solar (Small)
- (B) Illinois Solar for All: Community Solar
- (C) Illinois Solar for All: Non-Profit and Public Facilities
- (D) Illinois Solar for All: Residential Solar (Large)

CEJA also expanded the ILSFA Program by increasing available funding, prioritizing participation in areas of Illinois previously underserved by ILSFA, adjusting funding allocations across sub-programs, increasing efforts to small and emerging business participation, expanding the number of job training and business development programs, creating additional consumer protections for income-eligible participants, and encouraging the development of projects promoting energy sovereignty. Furthermore, Public Act 103-0188 created a new subsection (b-15) of Section 1-56 of the IPA Act, requiring compliance with the Prevailing Wage Act (820 ILCS 130/*et seq.*). To date, the IPA’s implementation of all changes to the ILSFA Program that outlined in CEJA and subsequent Public Acts is now complete, reinforcing the objective of bringing “photovoltaics to low-income

communities in this State in a manner that maximizes the development of new photovoltaic generating facilities, to create a long-term, low-income solar marketplace throughout this State[.]”¹

Consumer Protections in ILSFA

The objective of ILSFA is to assist income-eligible communities, which have historically been underserved by programs that offer resources and incentives for energy and housing, and access to capital. These communities have had low participation rates in the clean energy economy, leading to an information gap and a high level of distrust of programs designed to help them. As such, ILSFA has implemented additional consumer protection requirements to minimize risks to ILSFA participants.

These additional requirements include, but are not limited to:

- ILSFA Approved Vendors must verify that there are no upfront payments for Residential Solar (Small) and Community Solar sub-program participants (with the exception of nominal fees to purchase shares in community solar projects organized as cooperatives). Additionally, the ILSFA Approved Vendor must provide documentation to both the program participant(s), and to the Program Administrator explaining how the project or community solar subscription will result in a cash-flow positive experience for the participant(s) (including an estimate of the monthly savings) and specifically, ensure that the savings accruing to each participant are at least 50% of the value produced by the solar system through avoided usage or net metering credits.
- A site suitability report is required for distributed generation projects to ensure that projects are being installed on properties that will not need substantial structural, roofing or electrical repairs.
- ILSFA Approved Vendors (or their Designees) must provide standard disclosures of all costs to participants. Additionally, the customer’s right to cancellation is fourteen calendar days. For Community Solar and Low-Income Community Solar Pilot Procurement projects, customers shall have the right to cancel subscription agreements within three calendar days after the initial consummation, and to cancel subscriptions at any time with a thirty-day notice.
- Approved Vendors and Designees must ensure that loans to support customers’ participation in ILSFA will not be secured by the customers’ home or home equity. Financing amounts, terms, and conditions must be based on an assessment of the Program participant’s ability to repay the debt, as defined by Regulation Z, which is a federal rule that implements aspects of the Truth in Lending Act and the Dodd-Frank Act.²

¹ 20 ILCS 3855/1-56(b)(2).

² See Consumer Financial Protection Bureau, April 10, 2013. Ability-to-Repay and Qualified Mortgage Rule, Small Entity Compliance Guide, http://files.consumerfinance.gov/f/201304_cfpb_compliance-guide_atr-qm-rule.pdf. Under the regulation (12 C.F.R. § 1026.43, issued under authority of 15 U.S.C. § 1639c), creditors generally must consider eight underwriting factors: (1) current or reasonably expected income or assets; (2)

- Contracts that include ongoing payments must offer terms that include forbearance.
- All ILSFA contracts must include a full system warranty, as well as operations and maintenance guarantees for the duration of the REC Contract or 15 years, at no additional cost to participants.
- Marketing and contractual materials must be in the language requested by the customer.
- ILSFA Contracts may not include prepayment penalties.
- For Energy Sovereignty community solar projects where individual panels are owned by an eligible customer, the contract should include the purchase price of the panels net of Illinois Solar for All incentives. If ownership is transferred after tax benefits are captured, the contract should specify where applicable: the timing of the transfer, the price of the system at the time of transfer, funds held in escrow for the buyer, plans for ongoing monitoring and maintenance after the transfer of ownership, and other factors described for distributed generation projects.

For more information on the additional consumer protections for ILSFA, please read [Section 8.11 and Chapter 9 of the Modified 2024 Long-Term Plan](#), [2025-2026 Consumer Protection Handbook](#), and [Chapter 7 of the Approved Vendor Manual](#).

New Updates to ILSFA and Potential Updates in the Near Future

There has been one update to the ILSFA Program through the Reopening of the 2024 Long-Term Plan, and there are more through the 2026 Long-Term Plan and Public Act 104-0458.

Reopening of the 2024 Long-Term Renewable Resources Procurement Plan

On August 14, 2025, a petition was filed to reopen the proceeding that approved the 2024 Long-Term Renewable Resources Procurement Plan (“2024 Long-Term Plan”) to make modifications to the Plan in consideration of the passage of the federal reconciliation bill, H.R. 1. In the petition there was one proposal that would impact ILSFA. The proposal sought to pull forward up to \$20 million from the Renewable Energy Resources Fund, at the IPA’s discretion, into the 2025-26 Program Year to fund ILSFA sub-programs. On October 16, 2025 the Illinois Commerce Commission (“ICC”) approved \$20 million in funding to support growing interest in solar energy among income-eligible residents. The additional funding was divided between Illinois Solar for All’s sub-programs: \$7 million for Residential Solar (Small), \$8 million for Community Solar, and \$5 million for Non-Profit and Public Facilities.

2026 Long-Term Renewable Resources Procurement Plan

The Agency filed its 2026 Long-Term Renewable Resources Procurement Plan (“2026 Long-Term Plan”) with the ICC on October 20, 2025, and it proposed the following changes to ILSFA:

current employment status; (3) the monthly payment on the covered transaction; (4) the monthly payment on any simultaneous loan; (5) the monthly payment for mortgage-related obligations; (6) current debt obligations, alimony, and child support; (7) the monthly debt-to-income ratio or residual income; and (8) credit history.

1. Approved Vendors designated as *small and emerging businesses* may be able deduct the 5% collateral requirement from the REC payment, rather than having it due after contract execution, with a five-project cap per Approved Vendor.
2. The Agency may have the flexibility to allow Approved Vendors designated as *small and emerging businesses* to submit projects for a period of time before submissions are opened to all Approved Vendors in a given sub-program.
3. Based on the declining balance of the RERF as funds are committed to projects for the 2026 Long-Term Plan, beginning in the 2026-27 Program Year, the Agency proposes to shift the funding support for program administration, evaluation, and grassroots education from RERF funding to utility funding.
4. Funding reserved for energy sovereignty projects in every ILSFA sub-program will be released on January 1.
5. REC prices will be updated to account for market indicators and participation levels.
6. The current Referral Process will expand through a Participant Pipeline for the Residential Solar (Small) and Community Solar sub-programs with the intent to have a list of customers who have been income-verified available that can connect with Approved Vendors to ease customer acquisition costs and delays.
7. Master-metered buildings will be able to subscriber as an anchor tenant subscriber in the Community Solar sub-program with an alternative anchor tenant REC price.
8. Eligible projects located in census blocks adjacent to environmental justice communities or income-eligible communities will be able to participate in the Non-Profit and Public Facilities sub-program.
9. Eligible Job Trainees will be considered Eligible Job Trainees for five years, regardless of the job training program they completed. Additionally, Approved Vendors designated as *small and emerging businesses* will be able to count hours worked on a project that was not energized.
10. Project selection will be updated by: (1) projects will receive points depending on the project's geographic location and (2) Residential Solar (Small) projects will no longer receive points if they feature energy sovereignty.
11. Self-attestation for income-verification will be an option for Residential Solar (Small) sub-program participants who reside in an income-eligible community.
12. The Environmental Justice Communities Map will be updated to account for inaccurate data in EJScreen. In addition, communities with scores in the top 25% across the Illinois service areas of each RTO will be defined as an Environmental Justice Community.

All of the proposed changes above are subject to the ICC's approval. The 2026 Long-Term Plan is currently being litigation in front of the Illinois Commerce Commission and is expected to be approved by the ICC on February 17, 2026.

Public Act 104-0458

On October 30, 2025 the Illinois General Assembly passed new omnibus energy legislation, Senate Bill 25, colloquially known as the Clean and Reliable Grid Act, or CRGA and the Governor signed it

into law on January 8, 2026 as Public Act 104-0458. The Act will become effective on June 1, 2026.³ P.A 104-0458 brings the following changes to ILSFA:

1. The Agency may direct up to 25% of funds currently allocated to the Residential Solar (Small), Non-Profit and Public Facilities, and Residential Solar (Large) sub-programs towards the Illinois Storage for All Program.
2. ILSFA projects must either comply with the Minimum Equity Standard set forth in Section 1-75(c-10) of the IPA Act or meet the Job Training Requirements established in the Long-Term Plan.
3. Advance of capital is now available for Approved Vendors participating in the Residential Solar (Small) sub-program.
4. Increase in size cap for community solar projects from 5MW to 10 MW.
5. Master-metered multifamily buildings that primarily serve income-eligible residents may qualify under the Non-Profit and Public Facilities sub-program.
 - a. Non-profits and public facilities that can demonstrate that the non-profit or public facility serves income-qualified or environmental justice communities may potentially qualify for the Non-Profit and Public Facilities sub-program, regardless of physical location.
6. Income verification for the Residential Solar (Small) and the Community Solar sub-program can now include self-attestation pathways if the applicant lives in an environmental justice or a low-income community. The Agency is also called to explore more options for simplification of income verification.

If so desired, PA. 104-0458 is available [here](#) for review. These new changes to the ILSFA Program will need to be designed and implemented by the Program Administrator selected through this RFP process.

Data Points

Current Data for Program Year 2025-26

Number of Applications Received as of 1/7/2026

- (A) Residential Solar (Small) sub-program
 - a. 1,317 applications submitted
- (B) Illinois Solar for All: Community Solar
 - a. 9 applications submitted
- (C) Illinois Solar for All: Non-Profit and Public Facilities
 - a. 40 applications submitted
- (D) Illinois Solar for All: Residential Solar (Large)
 - a. 4 applications submitted

³ See <https://www.chicagotribune.com/2025/10/30/illinois-house-passes-major-energy-bill-boosting-battery-storage-for-renewables-sparking-debate-over-costs/>.

Number of Active Program Approved Vendor/Designees as of 1/7/2026

Approved Vendors: 84

Designees: 29

MWBEs: 18

Number of Active ILSFA Community-based Program Subcontractors

Grassroots Educators: 18

LIHEAP Agencies: 7

Number of consumer protection complaints received this Program Year as of 1/7/2026: 15

Number of EJSB apps received as of 1/7/2026: 5

Number of inspections performed to date this Program Year as of 1/7/2026: 227

Current project counts and available sub-program funding can be found on the [Project Dashboard](#). Program news and announcements can be found on the [Announcements](#) page of the ILSFA website. Read [Chapter 8 of the Final Modified 2024 Long-Term Plan](#) and the [Illinois Solar for All 2023-2024 Annual Evaluation-Report](#) for more information on the Illinois Solar for All Program's progress.

Appendix 2

State of the Program: Illinois Shines

Legislative Background/CEJA Implementation

The Illinois Shines program was created by the 2016 passage of the Future Energy Jobs Act (Public Act 99-0906 or FEJA). The initial phase of the Program had only three categories: Small DG, Large DG, and Community Solar and was sized at 666 MW. This phase of the Program focused on developing REC Contract mechanisms and new consumer protections as the fledgling solar market in Illinois grew with the support the Program brought.

The 2021 passage of the Climate and Equitable Jobs Act (Public Act 102-0662 or CEJA) supported significant expansion of Illinois Shines, including: a) three additional project categories (totaling six), b) introduction of the advance of capital mechanism, c) requirements for compliance with the Prevailing Wage Act (820 ILCS 130/*et seq.*), d) the introduction of the Equity Accountability System (EAS) and the Minimum Equity Standard (MES), e) increased data collection to support the IPA's assessment of the clean energy economy, and f) increased consumer protection measures. This piece of legislation altered the Program immensely and implementation of these cutting-edge requirements took an enormous effort, both from the Program Administrator and the Agency. To date, the Agency's implementation of all changes to the Illinois Shines program that were outlined in CEJA is now complete – solidifying Illinois Shines not just as a solar incentive program, but as a solar program focused on equity.

Consumer Protection Initiatives

As Illinois Shines grew, so did the solar market in Illinois. This growth brought with it new challenges that required the Agency develop innovative consumer protection initiatives. These initiatives were outlined in the Agency's 2024 Long-Term Plan and then approved by the Illinois Commerce Commission in the finalization of that Plan. The initiatives include: a) a restitution program to provide economic assistance to customers who have been harmed through their participation in Illinois Shines or Illinois Solar for All, b) an escrow process to ensure that customers who participate in IPA solar incentive programs and who have been promised a pass-through of the REC incentive payment in fact receive the payment, and c) a stranded customer REC adder to incentivize Approved Vendors to work with customers that have been stranded by their original Approved Vendor.

These efforts reflect a third phase of the Program focused on protecting consumers.

- On May 6, 2025, the initial phase of the Solar Restitution Program ("SRP") was launched. During this phase, the SRP will be available to (a) small Distributed Generation ("DG") customers who were promised a lump-sum pass-through payment, but the Approved Vendor kept the payment and did not make the promised payment; and (b) large DG customers where the Approved Vendor received – but failed to pass through – one or more

promised payments to the customer. The Agency intends to expand the SRP to capture additional types of harm.

- On June 26, 2025, the escrow process was launched. The escrow process will only be implemented if the Agency receives at least five complaints from customers that they did not receive their promised passthrough payments within 180 days from a specific Approved Vendor. Through the escrow process, Illinois Shines incentive payments are made to an escrow agent, rather than to the Approved Vendor. The escrow agent then disburses any promised payments to customers, with the remainder disbursed to the Approved Vendor.
- On October 23, 2025, the stranded customer REC adder was launched. Application of the Stranded Customer REC Adder is available to projects that pre-date the 2024 Long-Term Plan and for projects for which the incentive payments have already been made. The REC Adder is requested by the customer's new Approved Vendor or the original Approved Vendor (if the Designee is unstranding the customer), administratively approved by the Program Administrator, and approved by the Illinois Commerce Commission.

Things on The Horizon that Will Impact the Program

The past six months have introduced yet another phase of the Program, with several initiatives that will have significant Program impacts.

Reopening of the 2024 Long-Term Plan

On August 15, 2025, a petition was filed to re-open the Agency's 2024 Long-Term Plan. This filing was made in order to address federal head winds in the renewables industry. The order from the Illinois Commerce Commission on reopening was published on October 16, 2025 and included these changes to the Program, which were to take immediate effect:

1. Expanding the 2025-26 Program Year capacity by 100% except for the EEC Category, which was expanded by 64 MW for Group A and 169 MW for Group B.
2. Imposing an interim reallocation of 50% of remaining unused capacity on April 1, 2026, to distribute among waitlisted projects as the waitlist exist on April 1, 2026.

2026 Long-Term Plan

The Agency filed the 2026 Long-Term Plan with the Illinois Commerce Commission on October 20, 2025, and it contained several key changes proposed to the Illinois Shines program, including but not limited to:

1. Increase in the Program size to 1,000 MW for the 2026-27 Program Year and 800 MW for the 2027-28 Program Year.
2. Update to the annual Program Block Capacity for 2026-27 and 2027-28 Program Years to allow for increases in the Equity Eligible Contractor category.
3. Incorporation of \$20 REC Adder for customer-owned Small DG projects receiving 2026-27 Program Year capacity.

4. Introduction of a mechanism to track capacity from projects, that were under contract but were withdrawn or removed while allocated to a previous Program Year's capacity, and to redistribute that capacity through the established reallocation of uncontracted capacity process.
5. Revision to the Traditional Community Solar and Community-Driven Community Solar Scoring Guidelines.
6. Establishment of a reduced initial batch requirement for Small and Emerging Business Approved Vendors.
7. Creation of an "opt-in" batching mechanism for Community Solar projects.
8. Increase of the amount of time permitted for development of Community Solar projects from 24 months to 36 months.
9. Plan to develop a refreshed Master REC Contract, which will include a mechanism to remove and resubmit projects submitted with incorrect capacity factors.
10. New definition for "Abandoned Contracts" and proposed relief to be provided to Approved Vendors upon the occurrence of an Abandoned Contract.

The 2026 Long-Term Plan is currently being litigated in front of the Commission and is expected to be approved by an order issued by the Illinois Commerce Commission on February 17, 2026. Most if not all changes to the Program from this 2026 Long-Term Plan are set to start with Program Year 2026-27 on June 1, 2026, leaving the months of February-June for design and preparation.

Public Act 104-0458/Senate Bill 25/Clean and Reliable Grid Affordability Act (CRGA)

New omnibus energy legislation passed the Illinois General Assembly on October 30, 2025, and the Governor signed it into law on January 8, 2026 as Public Act 104-0458. The Act will become effective on June 1, 2026.¹ There are numerous changes that this piece of legislation makes to the Illinois Shines program, briefly outlined below:

1. Increase in the size cap for community solar projects to 10 MW.
2. A new block of "floating" capacity to be reserved each year in Illinois Shines.
3. Change in payment timing for Small DG REC Contracts.
4. Several consumer protection initiatives, including:
 - a. Creation of minimum contract terms for companies involved in the marketing, sale, installation, and financing of CS and DG solar.
 - b. Possible registration process for financing parties within the DG solar market.
 - c. Provision of security bonds for certain participating companies for the purpose of paying back harmed customers.
 - d. Increased requirements for companies relying on pass-through payments.

¹ <https://www.chicagotribune.com/2025/10/30/illinois-house-passes-major-energy-bill-boosting-battery-storage-for-renewables-sparking-debate-over-costs/> and <https://ilga.gov/Documents/Legislation/PublicActs/104/PDF/104-0458.pdf>.

5. New requirements for community solar projects over 3 MW in size to enter into a Project Labor Agreement.

The changes to Illinois Shines that this new, sweeping piece of legislation will bring once in effect will bring about yet another phase of the Illinois Shines program. The exciting changes called for in this piece of legislation will need to be designed and implemented by the Program Administrator selected through this RFP process.

Current Data for Program Year 2025-26 (Starting June 2, 2025)

Number of Applications Received as of December 31, 2025:

Small DG	7,360
Large DG	158
TCS	45
CDCS	82
EEC	159
Public Schools	15

Number of Active Program Participants as of December 31, 2025:

Approved Vendors	907 (including Single Project Approved Vendors)
Designees	831
EEC Approved Vendors	88
EEC Designees	34
EEC Subcontractors	32

Number of consumer protection complaints received this Program Year as of December 31, 2025:

431

Number of Inspections Performed to date this Program Year as of December 31, 2025:

Small DG	228
Large DG	27
Community Solar	9

For more information on the Illinois Shines program's progress, read the State of the Program announcement dated November 2025 and the [Program Year 2024-25 End of Year Report](#)

Appendix 3

List of Core Materials – Illinois Solar for All

Document	Update Frequency	Program Administrator Responsibility (High, Medium, Low)	Notes
Long-Term Plan – Chapter 8	Every 2 years	Low	<ul style="list-style-type: none"> • IPA leads this effort, with Program Administrator aiding in discussions on Program updates • Chapter 9 and 10 are also relevant to the administration of the Illinois Solar for All program
Illinois Solar for All Approved Vendor Manual	Annually, prior to new Program Year	High	Mid-year updates are sometimes required when a new law is passed, or a significant process change is needed
Consumer Protection Handbook	Annually, prior to new Program Year	Medium	<ul style="list-style-type: none"> • IPA makes text edits and Program administrator is responsible for design • Mid-year updates are sometimes required when a new law is passed, or a significant process change is needed
REC Contract	Every 2 years	Medium	<ul style="list-style-type: none"> • Several different versions of this contract exist, based on different project types and whether the Buyer is the IPA or a utility • Usually required to be updated following a new Long-Term Plan, but could require an update if a new law is passed • Core contract edits are led by the IPA's Procurement and Planning Consultant, but the Program Administrator must

			<p>incorporate edits into automated contracting processes</p> <ul style="list-style-type: none"> All versions of the ILSFA REC Contract can be found in the Resource Library on the ILSFA website: https://www.illinoissfa.com/resource-library/
Disclosure Forms	Annually, prior to new Program Year	High	<p>There are different disclosure forms for different project types. All versions of the disclosure form can be found in the Resource Library on the ILSFA website: https://www.illinoissfa.com/resource-library/ </p>
Informational Brochures	As needed	High	<ul style="list-style-type: none"> Program Administrator makes edits and IPA reviews All versions of the informational brochures can be found in the Resource Library on the ILSFA website: https://www.illinoissfa.com/resource-library/
Contract Requirements – Residential Solar and Non-Profit and Public Facilities	Annually, prior to new Program Year	Medium	IPA leads edits on this document and Program Administration team prepares final designed document
Contract Requirements – Community Solar	Annually, prior to new Program Year	Medium	IPA leads edits on this document and Program Administration team prepares final designed document
REC Payments Calculator	Annually, prior to new Program Year	Low	Program Administrator updates annually for any changes to the existing calculator structure
ILSFA Program Violations Report	As needed	High	Program Administrator updates report with each new warning letter and suspension

ILSFA Consumer Complaints Report	Every 2 weeks	High	Program Administrator updates with complaints received by the Program as well as suspended entities
Annual Complaints Reports	Annually, following close of each calendar year	High	Program Administrator draft this report and IPA reviews IPA files final report with ICC. All previous Annual Complaint Reports are available on the ILSFA Consumer Complaints page: https://www.illinoissfa.com/consumer-protection-complaints/

The list above is not comprehensive but rather a list of core documents, more documents that the Program Administrator is responsible for updating are located throughout the Illinois Solar for All website, especially here: <https://www.illinoissfa.com/resource-library/>

Appendix 4

List of Core Materials – Illinois Shines

Document	Update Frequency	Program Administrator Responsibility (High, Medium, Low)	Notes
Long-Term Plan – Chapter 7	Every 2 years	Low	<ul style="list-style-type: none"> • IPA leads this effort, with Program Administrator aiding in discussions on Program updates • Chapter 9 and 10 are also relevant to the administration of the Illinois Shines program
Program Guidebook	Annually, prior to new Program Year	High	Mid-year updates are sometimes required when a new law is passed, or a significant process change is needed
Consumer Protection Handbook	Annually, prior to new Program Year	Medium	<ul style="list-style-type: none"> • IPA makes text edits and Program administrator is responsible for design • Mid-year updates are sometimes required when a new law is passed, or a significant process change is needed
REC Contract	Every 2 years	Medium	<ul style="list-style-type: none"> • Several different versions of this contract exist, based on different project types • Usually required to be updated following a new Long-Term Plan, but could require an update if a new law is passed • Core contract edits are led by the IPA's Procurement and Planning Consultant, but the Program Administrator must incorporate edits into automated contracting processes • All versions of the REC Contract can be found here: https://illinoisshines.com/program-documents/#rec-contracts

Disclosure Forms	Annually, prior to new Program Year	High	There are different disclosure forms for different project types. All versions of the disclosure form can be found here: https://illinoisshines.com/program-documents/#df
Informational Brochures	As needed	High	<ul style="list-style-type: none"> • Program Administrator makes edits and IPA reviews • All versions of the informational brochures can be found here: https://illinoisshines.com/program-documents/#informational-brochures
Contract Requirements – Distributed Generation	Annually, prior to new Program Year	Medium	IPA leads edits on this document and Program Administration team prepares final designed document
Contract Requirements – Community Solar	Annually, prior to new Program Year	Medium	IPA leads edits on this document and Program Administration team prepares final designed document
REC Payments Calculator	Annually, prior to new Program Year	Low	Program Administrator inputs updated REC prices into the existing calculator structure
Program Violations Report	As needed	High	Program Administrator updates report with each new warning letter and suspension
Consumer Complaints Report	Every 2 weeks	High	Program Administrator updates with complaints received by the Program as well as suspended entities
Annual Complaints Report	Annually, following close of each calendar year	High	Program Administrator draft this report and IPA reviews IPA files final report with ICC

The list above is not comprehensive but rather a list of core documents, more documents that the Program Administrator is responsible for updating are located throughout the Program website, especially here: <https://illinoisshines.com/program-documents/>

Appendix 5

Application Process Explanation – Illinois Solar for All

The application process for the IPA's solar incentive programs features a unique two-part process – with Part I usually occurring prior to construction and Part II occurring after approval of incentives and construction of the project has taken place. Additionally, there are nuances between the application submission and review process for distributed generation and community solar projects. Please see below for a more detailed breakdown on what happens during each stage in the application submission and review process. Most aspects of the submission process are consistent with the Illinois Shines process, with additional eligibility and project requirements.

When the ILSFA program opens for project applications, each of the four sub-programs open with an initial project submission window that allows Approved Vendors to submit projects. After the initial project submission window closes, the Program Administrator will review project submissions for completeness of documentation and project eligibility. Only projects determined to be complete and eligible will proceed to the project selection process and approval by the ICC.

ILSFA also funds projects through the Renewable Energy Resources Fund (RERF). RERF-funded projects have REC contracts with the IPA as the counterparty. In other words, utilities act as the Buyer in projects funded by the Utility RPS budget and the IPA acts as the Buyer in RERF funded projects. All ILSFA projects (with the exception of the two Low-Income Community Solar Pilot Projects) are eligible to receive the whole of their 15-year REC incentives as a single payment upon Energization.¹

DISTRIBUTED GENERATION

1. Disclosure Form Generation

The Illinois Solar for All application portal contains an interactive form with various data fields that relate to the applicant project and customer. This form is filled out by either the Approved Vendor or one of its approved Designees which, upon generation, can either be e-signed using the portal e-signature functionality or printed, signed, scanned, and uploaded. The information on the Disclosure Form is automatically transferred to the application portal to start a Part I application. The customer executes the Disclosure Form.

2. Participant Eligibility Verification

With the Part I Application, the Approved Vendor must establish eligibility of the residence or non-profit or public entity that qualifies the project to participate in ILSFA. Residential Solar projects must demonstrate income eligibility of the household(s) being served by the project. Non-Profit and Public Facility projects must demonstrate geographic eligibility, and status

¹ ILSFA Community Solar projects have an option to have a true-up payment one year after Energization if they were not fully subscribed at Energization.

as an entity the program considers a critical service provider. Approved Vendors are required to gather relevant eligibility documentation, but households may request their income verification be completed through the Program Administrator directly if they have not yet to connect with an Approved Vendor and wish to confirm their eligibility or are more comfortable sharing sensitive information directly with the Program Administrator. Customers successfully documenting their eligibility are assigned an identifying number that an Approved Vendor uses to associate the eligible participant with their project application.

3. Part I Application

After the Disclosure Form is executed by the customer, the Part I application can be completed and submitted by the Approved Vendor. The Part I application may be completed when the project is in the planning stage and collects information on a system's planned technical aspects including but not limited to size, estimated REC production, equipment, and installation company. The Program does not require that an Approved Vendor submit a customer's Part I application prior to construction of the system.

4. Batching

After the Part I application is completed, it must be submitted to the Program in a batch. A batch is a group of applications submitted to the Program that move through the application process together and are contracted together as a single Product Order. To expedite processing of ILSFA projects there is no minimum batch size requirement, so projects may be batched individually. An Approved Vendor may select from their completed project applications to form and submit a batch. Applications are not eligible to receive Program capacity until the application is batched and that batch of applications is submitted via the portal, with payment for that batch initiated by the Approved Vendor.

5. Part I Verification

The Program Administrator will review each project's application in the batch for compliance with program guidelines and request additional information from the Approved Vendor as needed to verify the submitted information and approve the project. An Approved Vendor will be given up to two weeks to cure deficiencies in an application.

6. Project Selection

The Program Administrator will initiate the Project Selection Protocol if the total incentive value of eligible applications exceeds the available or non-carveout funds in a sub-program for a given Program Year. If so, projects in those sub-programs will be evaluated according to the Project Selection Protocol. Projects selected in this process will have funds allocated and move on to project development if applicable, as well as Part II project submission.

7. Approval of Application by ICC

The Program Administrator submits batches of Part I verified projects to the ICC for approval six business days prior to the relevant ICC meeting. The Commission meets approximately

every two weeks, thus the Program Administrator strives to efficiently process approved batches for submittal to the Commission.

8. REC Contract Execution and Collateral Posting

Contracts must be executed by all parties within 7 business days of receiving the contract from the Buyer (usually sent on the day of approval by the ICC). Within 30 business days of the ICC approving the contract (or Product Order), collateral constituting 5% of the value of a system's REC Contract must be posted with the utility counterparty in the form of cash or a letter of credit from an underwriter with credit acceptable to the utility. Depending on the circumstances, a failure to provide contractually required collateral may subject an offending Approved Vendor to discipline.

9. Project Development

Once a contract (or Product Order) for a batch has been executed by the Approved Vendor and the utility, distributed generation projects within that batch must be developed and Energized (Part II verified) in 18 months.

10. Part II Application

Once a system is completed and energized, and after ICC approval of the system's application for a REC Contract (or Product Order), the Approved Vendor will complete Part II of the application. Part II of the project application consists of uploading information verifying completion of the project and confirming that the specifications have not significantly changed from the Part I application.

11. Part II Verification and Invoicing

The Program Administrator will review the Part II application and, upon approval, will provide a confirmation sheet to the Approved Vendor to include with its invoice to the utility with which it has contracted to sell the RECs from that project. The Program Administrator separately will provide information to each Buyer (contracting utility or the IPA) covering the details of each completed project. After Part II verification, the Approved Vendor is permitted to invoice the Buyer for incentives per the terms in the REC contract.

COMMUNITY SOLAR

1. Part I Application

The Part I application for a community solar project does not commence with a Disclosure Form, like it does for Distributed Generation projects. The Part I application for a community solar project requires a description of the proposed subscription model (e.g., typical length and structure of contract, economic terms, marketing channels, etc.) and the expected mix of residential and non-residential subscribers. ILSFA Community Solar Part I applications must also demonstrate community engagement in the development of the project. The Part I application may be completed when the project is in the planning stage and also collects

information on a system's planned technical aspects including but not limited to size, estimated REC production, equipment, and installation company. The Program does not require that an Approved Vendor submit a customer's Part I application prior to construction of the system.

2. Batching

After the Part I application is completed, it must be submitted to the Program in a batch with other Part I applications. A batch is a group of applications submitted to the Program that move through the application process together and are contracted together as a single Product Order. An Approved Vendor may select from their completed project applications to form and submit a batch. Applications are not eligible to receive Program capacity until the application is batched and that batch of applications is submitted via the portal, with payment for that batch initiated by the Approved Vendor.

3. Part I Verification

The Program Administrator will review each project's application in the batch for compliance with program guidelines and request additional information from the Approved Vendor as needed to verify the submitted information and approve the project. An Approved Vendor will be given up to two weeks to cure deficiencies in an application.

12. Project Selection

The Program Administrator will initiate the Project Selection Protocol if the total incentive value of eligible applications exceeds the available funding in a given Program Year. If so, projects in those sub-programs will be evaluated according to the Project Selection Protocol. Projects selected in this process will have funds allocated and move on to project development if applicable, as well as Part II project submission.

4. Approval of Application by ICC

The Program Administrator submits batches of Part I verified projects to the ICC for approval six business days prior to the relevant ICC meeting. The Commission meets approximately every two weeks, thus the Program Administrator strives to efficiently process approved batches for submittal to the Commission.

5. REC Contract Execution and Collateral Posting

Contracts must be executed by all parties within 7 business days of receiving the contract from the Buyer (usually sent on the day of approval by the ICC). Within 30 business days of the ICC approving the contract (or Product Order), collateral constituting 5% of the value of a system's REC Contract must be posted with the utility counterparty in the form of cash or a letter of credit from an underwriter with credit acceptable to the utility. Depending on the circumstances, a failure to provide contractually required collateral may subject an offending Approved Vendor to discipline.

6. Project Development

Once a contract (or Product Order) for a batch has been executed by the Approved Vendor and the utility, community solar projects within that batch must be developed and Energized (Part II verified) in 24 months.

7. Part II Application

Once a system is completed and energized, and after ICC approval of the system's application for a REC Contract (or Product Order), the Approved Vendor will complete Part II of the application. Part II consists of uploading information verifying completion of the project and confirming that the specifications have not significantly changed from the Part I application.

Under the Part II application, a community solar project will have to demonstrate that it has met a minimum subscription level to be considered Energized and eligible to receive payment for RECs. To receive REC payments, at least 50% of the capacity of the project must be subscribed by eligible subscribers at the time of Energization or as outlined in the REC Delivery Contract.

Projects submitted for Part II Verification must also have a subscriber verification completed before the project is Part II Verified. Only when a project's application has been submitted for Part II Verification will a subscriber verification be initiated for that project.

8. Part II Verification and Invoicing

For the submission of Part II applications for Community Solar projects that were selected based on various scored project attributes, the Program requires demonstration and confirmation that commitments made in the Part I application were fulfilled throughout project development and installation, including those that resulted in higher project scoring. Some changes to Part I commitments are permitted but must be approved by the Program Administrator via a properly submitted change in commitment request in writing.

The Program Administrator will review the Part II application and, upon approval, will provide a confirmation sheet to the Approved Vendor to include with its invoice to the utility with which it has contracted to sell the RECs from that project. The Program Administrator separately will provide information to each Buyer covering the details of each completed project. After Part II verification, the Approved Vendor is permitted to invoice the utility for incentives per the terms in the REC contract. If not fully subscribed at the time of the Part II application, ILSFA Community Solar projects are allowed to receive a true-up payment one year after Energization if subscription levels have increased.

Appendix 6

Application Process Explanation – Illinois Shines

The application process for the IPA’s solar incentive programs features a unique two-part process – with Part I usually occurring prior to construction and Part II occurring after approval of incentives and construction of the project has taken place. Additionally, there are nuances between the application submission and review process for distributed generation and community solar projects, as well as an option to request advance of capital of up to 50% of the REC Contract value for projects submitted to the Equity Eligible Contractor (“EEC”) category prior to Energization. Please see below for a more detailed breakdown on what happens during each stage in the application submission and review process.

DISTRIBUTED GENERATION

1. Disclosure Form Generation

The Illinois Shines application portal contains an interactive form with various data fields that relate to the applicant project and customer. This form is filled out by either the Approved Vendor or one of its approved Designees which, upon generation, can either be e-signed using the portal e-signature functionality or printed, signed, scanned, and uploaded. The information on the Disclosure Form is automatically transferred to the application portal to start a Part I application. The customer executes the Disclosure Form.

2. Part I Application

After the Disclosure Form is executed by the customer, the Part I application can be completed and submitted by the Approved Vendor. The Part I application may be completed when the project is in the planning stage and collects information on a system’s planned technical aspects including but not limited to size, estimated REC production, equipment, and installation company. The Program does not require that an Approved Vendor submit a customer’s Part I application prior to construction of the system. During the Part I application process an EEC Approved Vendor may submit an advance of capital request subject to IPA approval.

3. Batching

After the Part I application is completed, it must be submitted to the Program in a batch with other Part I applications. A batch is a group of applications submitted to the Program that move through the application process together and are contracted together as a single Product Order. An Approved Vendor may select from their completed project applications to form and submit a batch. Applications are not eligible to receive Program capacity until the application is batched and that batch of applications is submitted via the portal, with payment for that batch initiated by the Approved Vendor.

4. Application Payment

Once a batch is submitted the Approved Vendor must pay the application fees for all applications in the batch. The nonrefundable application fee payment will be part of the batch submission process, and the fee will be automatically calculated by the application portal. Fees may be paid by wire, check, credit card, or ACH direct deposit initiated by the applicant. Once the application fee is processed by the Program Administrator, review of the Part I applications in the batch can commence.

5. Part I Verification

The Program Administrator will review each project's application in the batch for compliance with program guidelines and request additional information from the Approved Vendor as needed to verify the submitted information and approve the project. An Approved Vendor will be given up to two weeks to cure deficiencies in an application.

6. Approval of Application by ICC

The Program Administrator submits batches of Part I verified projects to the ICC for approval six business days prior to the relevant ICC meeting. The Commission meets approximately every two weeks; thus the Program Administrator strives to efficiently process approved batches for submittal to the Commission.

7. REC Contract Execution and Collateral Posting

Contracts must be executed by all parties within 7 business days of receiving the contract from the Buyer (usually sent on the day of approval by the ICC). Within 30 business days of the ICC approving the contract (or Product Order), collateral constituting 5% of the value of a system's REC Contract must be posted with the utility counterparty in the form of cash or a letter of credit from an underwriter with credit acceptable to the utility. Depending on the circumstances, a failure to provide contractually required collateral may subject an offending Approved Vendor to discipline.

8. Project Development

Once a contract (or Product Order) for a batch has been executed by the Approved Vendor and the utility, distributed generation projects within that batch must be developed and Energized (Part II verified) in 18 months.

9. Part II Application

Once a system is completed and energized, and after ICC approval of the system's application for a REC Contract (or Product Order), the Approved Vendor will complete Part II of the application. Part II consists of uploading information verifying completion of the project and confirming that the specifications have not significantly changed from the Part I application.

10. Part II Verification and Invoicing

The Program Administrator will review the Part II application and, upon approval, will provide a confirmation sheet to the Approved Vendor to include with its invoice to the utility with which it has contracted to sell the RECs from that project. The Program Administrator separately will provide information to each utility covering the details of each completed project. After Part II verification, the Approved Vendor is permitted to invoice the utility for incentives per the terms in the REC contract.

COMMUNITY SOLAR

1. Part I Application

The Part I application for a community solar project does not commence with a Disclosure Form, like it does for Distributed Generation projects. The Part I application for a community solar project requires a description of the proposed subscription model (e.g., typical length and structure of contract, economic terms, marketing channels, etc.) and the expected mix of residential and non-residential subscribers. The Part I application may be completed when the project is in the planning stage and also collects information on a system's planned technical aspects including but not limited to size, estimated REC production, equipment, and installation company. The Program does not require that an Approved Vendor submit a customer's Part I application prior to construction of the system.

2. Batching

After the Part I application is completed, it must be submitted to the Program in a batch with other Part I applications. A batch is a group of applications submitted to the Program that move through the application process together and are contracted together as a single Product Order. An Approved Vendor may select from their completed project applications to form and submit a batch. Applications are not eligible to receive Program capacity until the application is batched and that batch of applications is submitted via the portal, with payment for that batch initiated by the Approved Vendor.

3. Application Payment

Once a batch is submitted the Approved Vendor must pay the application fees for all applications in the batch. The nonrefundable application fee payment will be part of the batch submission process and the fee will be automatically calculated by the application portal. Fees may be paid by wire, check, credit card, or ACH direct deposit initiated by the applicant. Once the application fee is processed by the Program Administrator, review of the Part I applications in the batch can commence.

4. Part I Verification

The Program Administrator will review each project's application in the batch for compliance with program guidelines and request additional information from the Approved Vendor as

needed to verify the submitted information and approve the project. An Approved Vendor will be given up to two weeks to cure deficiencies in an application.

5. Approval of Application by ICC

The Program Administrator submits batches of Part I verified projects to the ICC for approval six business days prior to the relevant ICC meeting. The Commission meets approximately every two weeks, thus the Program Administrator strives to efficiently process approved batches for submittal to the Commission.

6. REC Contract Execution and Collateral Posting

Contracts must be executed by all parties within 7 business days of contract approval by the ICC. Within 30 business days of the ICC approving the contract (or Product Order), collateral constituting 5% of the value of a system's REC Contract must be posted with the utility counterparty in the form of cash or a letter of credit from an underwriter with credit acceptable to the utility. Depending on the circumstances, a failure to provide contractually required collateral may subject an offending Approved Vendor to discipline.

7. Project Development

Once a contract (or Product Order) for a batch has been executed by the Approved Vendor and the utility, community solar projects within that batch must be developed and Energized (Part II verified) in 24 months.

8. Part II Application

Once a system is completed and energized, and after ICC approval of the system's application for a REC Contract (or Product Order), the Approved Vendor will complete Part II of the application. Part II consists of uploading information verifying completion of the project and confirming that the specifications have not significantly changed from the Part I application.

Under the Part II application, a community solar project will have to demonstrate that it has met a minimum subscription level to be considered Energized and eligible to receive payment for RECs. To receive REC payments, at least 50% of the capacity of the project must be subscribed at the time of Energization or as outlined in the REC Delivery Contract.

Projects submitted for Part II Verification must also have a subscriber verification completed before the project is Part II Verified. Only when a project's application has been submitted for Part II Verification will a subscriber verification be initiated for that project.

9. Part II Verification and Invoicing

For the submission of Part II applications for Community Solar projects that were scored based on various project attributes, the Program requires demonstration and confirmation

that commitments made in the Part I application were fulfilled throughout project development and installation, including those that resulted in higher project scoring. Some changes to Part I commitments are permitted but must be approved by the Program Administrator via a properly submitted change in commitment request in writing.

The Program Administrator will review the Part II application and, upon approval, will provide a confirmation sheet to the Approved Vendor to include with its invoice to the utility with which it has contracted to sell the RECs from that project. The Program Administrator separately will provide information to each utility covering the details of each completed project. After Part II verification, the Approved Vendor is permitted to invoice the utility for incentives per the terms in the REC contract.

Traditional Community Solar Scoring Process

Due to the fact that there is a limited amount of capacity available in the Program for the development of Traditional Community Solar (“TCS”) projects, the Agency has developed a scoring mechanism for if/when the annual block of capacity is exceeded on the first day of the Program Year. The scoring mechanism acts to provide differentiation between projects in this often over-subscribed program category by offering points for various different project attributes that Approved Vendors can commit to. If the scoring mechanism is enacted for TCS, projects will be reviewed and scored based on the scoring criteria as outlined in Appendix E of the Program Guidebook, with projects selected from the application pool in the order of highest to lowest score until the block capacity is fully allocated, with any projects remaining being placed on a waitlist. This TCS scoring mechanism is outlined comprehensively in Appendix E of the [Program Guidebook](#).

A 20% developer cap for any affiliated family of project developers for this Traditional Community Solar capacity applies to all TCs projects each Program Year. Any affiliated family of project developers which exceeds 20% of the awarded capacity in a given Program Year’s Traditional Community Solar block (determined separately for Groups A and B) will have any projects that cause them to exceed the 20% capacity cap moved to become the first projects on the waitlist for the applicable group.

The Program Administrator needs to be able to administer this scoring process in a timely and complete manner (if/when it is needed), apply the developer cap properly, and continue to score TCS projects that are submitted across the Program year for placement on the waitlist, which requires a minimum point value of 5.

Community-Driven Community Solar Scoring Process

A Community-Driven Community Solar (“CDCS”) project is defined as a community solar project which (1) is interconnected to an electric utility, a municipal utility, or a rural electric cooperative, (2) allows subscribers to pay for shares or some other “interest” in the project, receiving bill credits in exchange; and (3) does not exceed 5,000 kW (5 MW) AC in size, and which features attributes

allowing the project to be evaluated for participation in the community-driven community solar category, as established through Section 1-75(c)(1)(K)(v) of the IPA Act.

Each Program Year, there is a 90-day application window for Community-Driven Community Solar projects to be submitted prior to any project selection. Upon closing of the 90-day application window, projects will be reviewed and scored based on the scoring criteria as outlined in Appendix F of the Program Guidebook, with projects selected from the application pool in the order of highest to lowest score until the block capacity is fully allocated. A minimum score of 6 points must be achieved to be eligible for a REC contract in the CDCS category. Random selection will be utilized as a tiebreaker only for equally scored projects to fill available capacity, if any.

However, should the capacity available be so small as to only accommodate one or more projects below a certain size, then the Agency may only consider those projects small enough to not exceed that remaining capacity. After project selection for any given Program Year, projects that have a minimum score of 10 points will be placed on a waitlist for the following Program Year.

This CDCS scoring mechanism is outlined comprehensively in Appendix F of the [Program Guidebook](#).

Appendix 7

Illinois Solar for All

Illustrative 2025-2026 Program Administration Tasks

This Appendix provides an overview of tasks being conducted by the Illinois Solar for All Program Administrator during the 2025-2026 Program Year and is meant to be illustrative of the scope of work related to Illinois Solar for All that would be conducted by the Joint Program Administrator after the program transition is completed.

Scope of Work and Deliverable Schedule

Tasks for the Program in accordance with the Agency's Long-Term Renewable Resources Procurement Plan ("Long-Term Plan").¹

Sub-Task 1: Program Management

- Ongoing Program planning activities
- Internal team coordination and management
- Administrative work activities pertaining to daily Program operations
- Provide quarterly reports to the ICC and Agency, and an annual Program year retrospective for the ILSFA website
- Provide progress updates and reporting of Program metrics, Program Administrator, Grassroots Educator, Connector, and subcontractor activities; inclusive of post-invoicing tracking
- Key Performance Indicators ("KPIs") and Performance Targets.
 - Maintain and report on the KPIs and performance targets. This includes the addition of new program data and information to update and/or expand the KPIs, informing the IPA on the evolution of the ILSFA Program, results, trends, challenges, opportunities, and recommendations.
 - Information provided in the KPIs shall be issued at least monthly and used in weekly meetings, support decision making and strategic activities, and inform prospective program changes.
 - KPIs to include both qualitative and quantitative results – providing greater clarifications of quantitative statistics with supplemental qualitative explanations.
 - Adherence to core performance targets surrounding communication, collaboration, issue escalation, quality assurance, and quality control.

Deliverables:

- Monthly KPI updates. Supporting data (in addition to visuals) will be made available to IPA staff through the currently existing SharePoint site. Any KPI update delays will be promptly communicated to the IPA, including identification of the challenge related to the delay and

¹ The 2024 Long-Term Plan was approved by the Illinois Commerce Commission on February 20, 2024 in Docket No. 23-0714.

an estimated time for issuance of the updated KPIs. Qualitative information supporting identified KPI metrics will be appropriately sourced, including documentation or data as appropriate. Qualitative information will be provided in written format or embedded as part of the KPIs.

- Program Year Planning Calendar workplan, including timelines for deliverables, annual program material updates, and major projects.
- Monthly reports of activities, results, and cost of labor and expenses for the administration of the Home Repairs Pilot, and the US Department of Energy Low-Income Connector Tool.
- Report on project submission and review activity and results of participant surveys to the IPA on at least a monthly basis.
- REC Tracking and Management:
Four Quarterly Reports per Program Year

Sub-Task 2: Approved Vendor Management

- Onboarding and continuous management, support, and training of Approved Vendors by Approved Vendor Managers
- Review project applications submitted by Approved Vendors to confirm that they meet program requirements
- Annual review and reporting of community solar subscriber levels, and follow up on insufficient subscriber levels
- REC Tracking and Management Process.
 - Continue review of the contracts and REC deliveries of systems in its portfolio, as described in Section 7.15 of the Long-Term Plan.
 - Perform REC delivery reviews on a regular cadence.
 - Report to the Agency and Buyer when REC management reviews identify RECs are not being created or transferred according to REC contract terms.
 - Facilitate communications on post-invoicing project requirements in coordination with the Agency. Includes preliminary notices and reminders, force majeure requests, contract assignments and withdrawals, and outreach to parties that fail to make required initial and ongoing RECs transfers, documentation of issues identified and communications to resolve identified issues, development of standard operating plans for REC tracking and ongoing post-invoicing contract management, and support in issue escalation.
 - Review of Approved Vendor Annual REC reports
- REC contract documentation generation and process development for the ILSFA Program.
- Part I and Part II Project Application reviews of projects not utilizing federal funding from the Greenhouse Gas Reduction Fund, including review of community involvement in projects, review of job training coordination, review of Illinois Solar for All consumer protections, associated quality assurance inspections, generation of quarterly netting statements and invoices, and monitoring and coordination of post-Part II compliance obligations.
- Maintain and implement high quality assurance and quality control (QAQC) processes and controls, inclusive of technical team oversight and direction.
- Project approval request memo ("ICC memo")
 - Draft and submit an ICC memo to the Illinois Commerce Commission for their regular open meetings, including Buyer assignment and funding tracking.

- Implement a QAQC process to review draft ICC memos, prior to submission, to eliminate errors in reporting.
 - Track errors (if any) as identified by the ICC and/or utilities and immediately implement a process to correct the errors going forward (in future ICC memos)
- Project invoice generation and tracking to support buyers
 - Excludes projects that are part of the Community Solar Pilot Program
- Increase visibility and communication with Buyers via weekly utility meetings.
- Increase coordination with portal development team to increase quality and streamline development and testing efficiency.

Deliverables:

- Annual update of the ILSFA Approved Vendor Manual .
- REC contract amendment support to Approved Vendors . Draft ICC Memo on roughly a biweekly basis with the ICC's regular open meetings when eligible projects are ready for ICC approval.
- Create REC contract documents and share with appropriate parties.
- Create Quarterly Netting Statement documents for buyers and generate invoices for sellers (Approved Vendors).

Sub-Task 3: Marketing & Communications

- Creation of a communications plan to inform stakeholders and participants about updates to the Residential Solar sub-program budget
- Development of newsletters and announcements, and review and editing of program documents such as the Approved Vendor Manual
- Manage content and functionality updates on the public-facing ILSFA website
- Ongoing review of Approved Vendor and Grassroots Education marketing materials, as well as marketing materials developed by program partners that include or reference ILSFA
- Program promotion, including social media, media outreach, and advertising, as needed
- Maintain high attention to detail for all products developed, including alignment with program messages, processes, and requirements.

Deliverables:

- Develop Residential Solar Communications Plan and associated materials with the sub-program budget updates as needed throughout the program year
- Report of activity to the IPA on at least a monthly basis, including announcements published and status updates of ongoing projects (e.g., website update)
- Monthly newsletters and announcements as needed (average 2-3 per week) to program stakeholders
- Update ILSFA website to reflect releases of program materials, including evaluation or other program reports, updates of annual income guidelines, and maintaining the Document Archive.

Sub-Task 4: Technology

- Ongoing support and maintenance of Illinois Solar For All website
- Ongoing support and maintenance of Vendor Portal, including:
 - Approved Vendor account creation
 - Triage of user issues and ongoing user management support
 - Upgrades and general Salesforce maintenance
- Development of improvements that facilitate automation and efficiency of the Illinois Solar for All website. This includes:
 - Support for ILSFA website
 - Support for Vendor Portal
 - Improvements for ILSFA website
 - Improvements for Portal
- Ongoing development of improvements of the Approved Vendor portal to manage application submission, review, and status , including a high focus on integrity and consistency of project application, contract, and invoicing data.
 - This includes Usability Improvements for AVs and AVMs including efforts to reduce duplicate data entry and simplify workflows
 - Develop and implement security, processes, and communication improvements to streamline portal development and improve overall product quality.
 - This includes continuous tracking of cyber security initiatives and impacts to internal and external systems, tools, and software
- Update and maintain income-eligible and environmental justice community maps
- Build customizable reports and generate various Program documents
- Develop API for Vendor Portal.
- Data Dictionary. Document data dictionary definitions, rules, and associated metadata, including major dependencies utilized within the system to create underlying data sets or flowing to key systems or tools.
 - All new processes, data sets, or changes to data structure shall be fully documented at the time of the updates to ensure the data dictionary is kept current.
 - Provide the IPA with access to the definitions, rules, and structures, including any updates to the data dictionary.
- Define process improvements that will be implemented, including a move to quarterly and monthly releases, with hot fixes for critical items. Continue quarterly planning sessions for collaborative prioritization and ongoing touchpoints for transparency.
- Complete development plan with timeline for updates needed to the Program Year 2026-2027 Disclosure Form and portal by February 1, 2026, with development to be completed by May 15, 2026, and rollout by June 1, 2026.
- The quarterly review process will be used to prioritize larger features, in tandem with change management processes.

Deliverables:

- Updated Process Documentation for the 2025-2026 Program Year by August 31, 2025. This will include expected sprint dates, quarterly calendar, and expected touchpoints with the IPA.

- Complete development plan with timeline for updates needed to the Program Year 2026-2027 Disclosure Form and vendor portal by March 1, 2026, with development of updates to be completed by May 15, 2026, and rolled out by June 1, 2026.
- Updated Process Documentation for the 2026-2027 Program Year by June 30, 2026.

Sub-Task 5: Program Coordination

- Coordinate activities with the Illinois Shines Program Administrator.
 - Sync between Program Administrators to occur on a regular basis (at least monthly), expedited if warranted by the specific activity
 - Efforts may include AV issue resolution, data exchange, AV contract development, etc.
 - Continue phased transition of contract document generation from Illinois Shines Program Administrator
- Engage and educate staff and coordinate activities with programs promoting energy efficiency and other services
- Hold regular meetings of Environmental Justice Self-Designation Committee, process applications for Self-Designation as an Environmental Justice Community, and communicate updates to other entities utilizing ILSFA EJ maps
- Coordination with community entities for the Home Repair Pilot
- ILSFA Advisory Committee coordination and other stakeholder engagement efforts

Deliverables:

- Monthly metrics report of referrals for home repair assistance associated with projects applying for the Home Repair initiative
- Monthly summaries of activities coordinating with other entities to promote Program participation or layering of benefits with other income-eligible service providers
- Facilitate new referral pipelines or significant collaborations with at least three new energy efficiency or other service providers
- Facilitate data collection and lessons learned throughout the Home Repairs Pilot
- Provide follow up reports to the Agency following Advisory Committee meetings detailing recommendations for improvements from the Committee and proposals for implementing recommendations in coordination with the Agency

Sub-Task 6: Small and Emerging Business Support

- Engage with solar workforce development programs and facilitate connection of those programs' graduates and Approved Vendors
- Coordinate with Agency staff on a quarterly basis to update the Energy Equity Portal and Small and Emerging Business Hub with relevant ILSFA content
- Provide three recorded online skill building sessions for Small and Emerging Businesses with the Department of Commerce and Economic Opportunity
- Plan one in-person regional clean energy conference
- Plan three informational live webinars

- Hold five 1:1 technical assistance meetings per month for Small and Emerging businesses
- Provide support to five to ten Small and Emerging Businesses to apply for Equity Energy Futures Grants (EEFG)

Sub-Task 7: Consumer Protection

- Establish and maintain a Consumer Complaints Call Center to respond to voice calls and emails
- Document the frequency and nature of complaints, timeliness of response and resolution, and any enforcement of actions. Report findings to IPA staff, facilitating discussions between the ILSFA Program Administrator and the IPA to resolve issues and improve processes.
- Referral of interested potential participants to participating Approved Vendors
- Coordinate informal outreach and notices of potential violations (NOPV) to AVs while issuing disciplinary actions such as warning letters, suspensions, and reinstatements.
- Finalize any outstanding consumer protection SOPs describing ILSFA consumer protection processes. Further, perform updates to the CP SOPs as necessary to account for changes in process, roles/responsibilities, and to account for efficiency improvements.
- Finalize and implement an SOP for the Audit of Contract Requirements and Disclosure Forms.
- Refine internal Approved Vendor Manager Training Resource for use in onboarding and regular refresher trainings for relevant Program staff.
- Generate enhancement feedback for annual update to the Approved Vendor Manual, Consumer Protection Handbook, and Contract Requirements (Community Solar, and Residential, and NPPF).

Deliverables:

- Complete plan for use of Approved Vendor Manager Training Resource, inclusive of use of the Resource in onboarding and regular Approved Vendor Manager refresher trainings and regular updates to the Resource.
- Development schedule for finalization of SOPs and implementation of processes:

Sub-Task 8: Grassroots Education Coordination

- Facilitate selection process, onboarding, training, contract preparation, and ongoing coordination of Grassroots Education efforts. This includes year-over-year updates to the processes and practices to implement improvements following lessons learned and to implement efficiencies.
- Assist in development of campaign strategies for the organizations selected to be Grassroots Education subcontractors, and provide guidance and technical support to Grassroots Educators to maximize campaign success
- Purchase and distribute branded and promotional materials to the Grassroots Educator subcontractors

Deliverables:

- Calendar of reporting deadlines, meeting dates, pod check-ins and other milestones of PY2025-2026 .

Sub-Task 9: Legal

- Legal review of disciplinary letters
- Legal review and timely response to requests made under the Freedom of Information Act
- Legal review of Program decisions and documents to ensure compliance with law and manage potential conflicts of interest

Deliverables:

- Monthly report with counts and summaries of disciplinary or other letters, Freedom of Information Act requests completed, and other completed data requests for ILSFA stakeholders or other entities

Sub-Task 10: Ad hoc tasks

- Ad hoc duties related to the handling of unforeseen events as may be required for the successful operation of the Program (i.e., force majeure requests, contract assignments, etc.), to be invoiced on an actual time spent.
- This also includes subcontractor transitions and financial product reviews.

Deliverables:

- Any specific activities or deliverables will first be discussed between IPA and the ILSFA Program Administrator, defined, assigned with a targeted schedule, and a defined budget. Any such schedule, scope of work, and budget will first be approved by the Agency before the ILSFA Program Administrator team progresses.

Appendix 8

Illinois Shines

Illustrative 2025-2026 Program Administration Tasks

This Appendix provides an overview of tasks being conducted by the Illinois Shine Program Administrator during the 2025-2026 Program Year and is meant to be illustrative of the scope of work related to Illinois Solar for All that would be conducted by the Joint Program Administrator after the program transition is completed.

Scope of Work

Task 1: Overall Program Management (client communications, regulatory, financial management and data analytics)

- A. Program oversight and staff management
 - 1. The Program Team will onboard new staff through trainings and reviews of resources within the first two weeks of hire.
 - 2. Enable and maintain program staff/subcontractor, IPA, utility, and participant access to program tools including the Program Portal, SharePoint, Monday.com, Salesforce, Slack, and Tableau. Accesses to each tool will be provided on an “as needed” basis.
 - 3. Direct and oversee program staff and subcontractor work and productivity through metrics-tracking and evaluating throughput, reassigning staff as appropriate to maintain efficiency of all Program Team sub-teams.
- B. Meetings and Reports
 - 1. Host meetings every two weeks to provide updates on program status and discuss key program topics including goals and continuous improvement plans.
 - 2. Create and share written report of Program activity every two weeks, including key performance indicators and deliverables or milestones completed.
 - 3. Host regular meetings for all five Program administration areas (Operations, Information Systems, Consumer Protection, Strategy, and Marketing/Communications), at a cadence mutually agreed upon.
 - 4. Program managers/leadership to meet regularly with IPA’s Program Manager to ensure work is on track.
 - 5. Program Administrator will host additional meetings, creating sub-committees to address specific management tasks as necessary.
 - 6. Host quarterly meetings that focus on past quarter’s accomplishments/challenges and plans for next quarter.
- C. Monthly Invoicing
 - 1. Invoice IPA monthly.
- D. Additional Reporting

1. Business Enterprise Program (“BEP”) compliance reporting
 - a. Submit monthly subcontractor payment amounts via the State of Illinois Commission on Equity & Inclusion website (<https://cei.illinois.gov/business-enterprise-program/compliance.html>).
 - b. Provide updated Utilization Plans for subcontractors qualified as BEP as needed.
2. Report the number of qualified veterans and certain ex-offenders hired during the last completed fiscal year annually to IPA by August 31, 2025.
3. Ad hoc support and deliverables that may be required to assist the Agency, such as reports or updates as required by the Illinois General Assembly or through orders and decisions made by the Illinois Commerce Commission (“ICC”).

E. Data and Analytics

1. Maintain and refresh data within existing public reports on Program website Illinoisshines.com:
 - a. Update the map of participating projects on a monthly basis.
 - b. Update the application metrics tables on a daily basis.
 - c. Update the Block Capacity Dashboard on a daily basis.
 - d. Provide regular updates of Project Application Reports.
 - i. Update Project Application Reports #1, #2, and #3 three times per week on Monday, Wednesday, and Friday.
2. Create additional and/or updated public reports as mutually agreed upon between the Program Administrator and IPA.
3. Maintain and refresh data for IPA use.
 - a. Maintain and expand existing Tableau reporting and dashboard.
 - b. Update the Tableau dashboard daily to provide application summaries and supporting data detail.
 - c. Design and develop new reports, via Tableau or alternative, for IPA use and program administration, as mutually agreed upon.
 - d. Make recommendations and enhance internal reporting dashboard.
 - i. Update and revise dashboard twice annually.
4. Analytics
 - a. Forecast volume of applications submitted, reviewed, and verified by category and type on a quarterly basis.
 - b. Maintain reporting capabilities that will allow the public to review weekly applications statistics by application status.

F. Program Implementation Manual

1. Present Program Implementation Manual (“PIM”) for 2025-26 Program Year to IPA for review by July 15, 2025.
2. Present modified PIM with any pertinent updates to IPA for review by January 5, 2026.
3. Address any comments or requested changes by January 30, 2026.
4. Present a revised PIM for 2026-27 Program Year to IPA for initial review by May 1, 2026.

G. Regulatory and Policy

1. Update Program Guidebook (“Guidebook”) on an annual basis prior to Program Year opening with supplemental updates to the Guidebook, as mutually agreed upon throughout the Program Year.
 - a. Support updates with related stakeholder feedback sessions, review and provide assessment of written stakeholder feedback, edit the Guidebook document, and release the final Guidebook document after editing is complete, supporting IPA publishing to the market by April 15, 2026.
 - b. Identify critical Guidebook updates such as clarification of language to IPA as needed throughout the year.
2. Coordinate with IPA on 2026 LTP
 - a. Provide recommended additions, modifications, and other changes to the LTP.
 - b. Provide support for stakeholder feedback opportunities including developing, drafting, publishing, tracking and analyzing stakeholder feedback requests for 2026 LTP.
 - c. Collaborate with IPA on updated LTP language and edits after decisions are made on revisions to Program requirements and policies and assist with final publication both before filing with the ICC and after the ICC final order is issued.
 - d. Retrain teams on identifying ex parte communications, track such communications received by Program Administrator, and provide tracker to IPA.
 - e. Provide support to IPA on responding to issues raised by stakeholders, as requested.
 - f. Provide scope/impact reports for possible new initiatives considered throughout the LTP update process.
3. Provide policy support and analysis on various regulatory and programmatic issues, including potential changes in Illinois law, as requested by the Agency.

H. Internal and Program Staff Diversity, Equity, and Inclusion (“DEI”) Initiatives

1. Deliver and report on DEI Survey annually.
2. Adhere to diversity, equity, and inclusion reporting via Tableau dashboard updated quarterly.
3. Report DEI metrics on a quarterly basis at Program quarterly meeting with IPA.
4. Host quarterly meetings with IPA DEI team

I. Program Portal and Related Information Systems Work

1. Product Manager will provide business requirements to the information systems team for feature development and issue resolution.
2. Product Manager will facilitate sign off with IPA on business requirements and schedule for new information systems work. Business requirements will be discussed during information systems team/IPA calls or in ad hoc meetings as needed, and written approval will be provided by IPA once scope is mutually agreed upon. Any changes to the agreed-upon scope of work outlined in this Task

Order will be formalized in writing between Program Administrator and IPA via email.

3. Develop and prioritize features within the feature backlog in coordination with IPA.
4. Provide IPA with quarterly feature roadmap updates with an estimated six month trajectory to feature roll-out.
5. Provide IPA and maintain a current public-facing version of the feature road map.
6. Coordinate user acceptance testing with internal stakeholders and business requirement signoff on feature releases.

J. Standard Operating Procedures (“SOP”) Creation and Maintenance

1. Conduct an annual review of all Program SOPs.
2. Upon mutual agreement, updates will be made to any of the SOPs identified in this Task Order to reflect current procedures.
3. When new processes are established, E Program Administrator will draft an SOP for review and approval by IPA.

K. Other tasks related to program management, as coordinated and mutually agreed upon between Program Administrator and IPA.

Task 2: Program Portal Development, Maintenance and Operations

A. Continue the development of the Program Portal platform and feature development. This includes release scheduling and management, features and enhancements, software requirements and design specifications, technical development, quality control, documentation, and training.

1. Deliver features or specifications as prioritized on roadmap during each quarter’s planning meeting. Priorities for the Program Year will be determined with IPA’s input and features will be selected based on available budget. Key deliverables will include:

- a. Address validation and normalization
 - Implement address normalization tool to standardize installation addresses during Part I application submission, to identify potential expansions, co-locations, and duplicate applications prior to contracting.
- b. Project application processing assignments
 - Develop and implement ability to assign applications to specific processors within the Program Portal to enable ease of lookup and assignment.
- c. Project application Quality Assurance (“QA”) tracking
 - Add ability to track all application processing QA activities in the portal before a project is verified.
- d. Subscriber management
 - Provide Community Solar Approved Vendors (“AVs”) and Designees the ability to create, edit, and terminate subscriptions in the portal.
- e. AV/Designee view improvements
 - Consolidate views of AV and Designee company records, user accounts, and AV/Designee relationships to streamline vendor management for Strategy team.
- f. New Program Year 2026-2027 configuration

- Specific scope to be determined in Q1 2026 based on new program year requirements including updates from the 2026 LTP or potential change in Illinois law, through mutual agreement of Program Administrator and IPA.
- B. Program Administrator will create technical training and documentation related to the updates of the Program Portal on how to use features and enhancements as new features are released.
 1. Provide market updates to support communicating new features as needed.
 2. Program Portal help text and user guidance will be updated to announce and support new features.
- C. Program Team will provide Program Portal email and phone support on business days (Monday – Friday) from 9 AM to 5 PM (Central Time), excluding Illinois state observed holidays. Support will be provided in three areas of user support:
 1. Program Administrator will troubleshoot issues with Program Portal users and determine if errors are due to user-error or a Program Portal bug that needs to be remedied. If the latter, Program Administrator will record the bug, understand its scope, and create a plan to address and remedy the bug.
 2. Program Administrator will provide support for all new Application Program Interface (“API”) users to ensure that these entities are able to connect to the program APIs and provide technical documentation in support of API development efforts by vendors.
 3. Program Administrator will support user issues included but not limited to:
 - a. Program Portal login issues;
 - b. Issues related to application interface/submission.
- D. Program Portal Maintenance and Operations: Program Administrator will support the ongoing underlying system maintenance, including hosting system monitoring, security assessments, software upgrade planning, and performance improvement assessments. Specific tasks include:
 1. Monitoring of automated data exports and import routines and files.
 2. Timely adding or removing user Program Portal access via onboarding or off-boarding processes this includes AVs, Designees, program administration staff, IPA staff, etc.
 3. Standard server maintenance managed weekly.
 4. Assessing, planning and scheduling maintenance activities.
 5. Server hosting.
 6. Procuring an SSL Certificate of Authority.
 7. Annual registration of domain name.
 8. New server configuration when migrating servers; on demand and as needed.
 9. Hardware firewall and load balancer operations and maintenance.
 10. 24/7 Network operations center monitoring.
 11. Daily data backup and off-site secure data storage.
 12. The Program Portal data will be backed-up to separate servers located in alternative geographic locations in the United States. The database is backed-up through automated procedures.

13. Provide general information security and disaster recovery planning.
 14. Assessing periodic patch releases for value added features, security enhancements, and potential performance improvements, and scheduling approved maintenance activities.
 15. Identifying engineering activities to address technical debt and scheduling those activities for implementation.
 16. Program oversight and controls including resource supervision (staff and subcontractors), reporting, communications, program meetings.
 17. Service subscriptions
- E. Data archiving and data back-up: manage data subscription to a Salesforce data archive solution.
- F. Reporting of system security or performance issues: Program Administrator will notify IPA as soon as any security or performance issues are identified which may impact participants, utility users, or IPA.
- a. Any phishing attempt or other security concern with the application platform, website, Salesforce, SharePoint, or other Program systems identified will be reported to IPA including the time of event, time identified by Program Administrator, and any additional details known.
 - b. Updated information will be provided to IPA as often as hourly and at least daily (dependent upon the impact of the issue) until resolution of the issue.
 - c. A summary of the issue, resolution, and any mitigation plans will be provided to IPA within two (2) weeks following the event with additional time allowable when approved by IPA.
- G. Security and Compliance Reporting: Provide the Agency an annual SOC2 report, and a SOC2 bridge where applicable.

Task 3: Operations Activities

Program Administrator will maintain operations support for Approved Vendors and their Designees. These tasks include:

- A. Customer Support: Program Administrator will maintain call center for administration and consumer protection phone lines. The hours of operation will be 9am-5pm Central Time Monday through Friday (excluding Illinois State holidays).
1. Staff will identify caller needs and provide answers, information, and solutions.
 2. Staff will follow approved script when handling different topics.
 3. Calls will be logged in Salesforce platform by staff.
 4. Emails received by Program Administrator will be routed to proper internal staff or partners for response and logged in Salesforce platform. Staff will provide initial response to emails within two business days.
 5. Calls and emails will be escalated to IPA as needed based on mutually agreed upon escalation requirements.
 6. Calls and voicemails received outside of normal business hours will be returned within one business day.

- B. Application Processing: Program Administrator will manage application review from start to finish (i.e., Disclosure Form generation through Part II verification) within the “Illinois Shines Portal” platform. These activities outlined in the processing Standard Operating Procedures (SOPs) saved in SharePoint reviewed by and accessible to IPA include:
1. Part I Application:
 - a. Disclosure Form review.
 - b. Technical review and battery schematic review as needed.
 - c. Part I application review, including management and resolution of “Need Info” requests to Approved Vendors, and verification.
 - d. Verify volume of Part I applications as estimated in the budget for this task, as specified in Table 5.
 2. Part II Application:
 - a. Part II application review, including management and resolution of “Need Info” requests to approved vendors, and verification.
 - b. Verify volume of Part II applications as estimated in the budget for this task, as specified in Table 5.
 - c. Process allowable post Part II verification application changes including:
 - Engineering review of battery schematics for battery/storage additions
 - Changes in system ownership
 - Changes in panel locations
 - Other case-by-case changes as needed
 - d. Review Community Solar Disclosure Forms for Part II Verification.
 3. Accept and process application fee payments; marking batches as paid.
 4. Identify, classify, and communicate any application data or documentation deficiencies and/or discrepancies in applications as part of the “Need Info” process.
 - a. Request needed information from AV via email, evaluate response and update application record toward expedited verification of application.
 5. Perform quality assurance on at least ten percent (10%) of submitted Part I and Part II applications; updating this percentage as needed.
 6. Maintain the Service Level Agreement (“SLA”) turnaround time of Distributed Generation (“DG”) applications from “submission” (batched and paid) from the AV to “reviewed” of ten (10) business days for at least eighty percent (80%) of projects excepting those with extenuating circumstances out of the Program Team control.
 - a. Notify IPA when DG turnaround time (“submission” to “reviewed”) exceeds 20 business days for more than eighty percent (80%) of applications.
 - b. Provide market update when DG turnaround time (“submission” to “reviewed”) exceeds twenty-five (25) business days for more than eighty percent (80%) of applications.
 - c. Through regular reporting, notify IPA of status of all application review metrics in relation to SLAs; coordinate with the IPA to determine the details of prospective market updates that may be needed in relation to application review turnaround time.
 7. Maintain turnaround time of Community Solar (“CS”) applications from “submission” (batched and paid) from the AV to “reviewed” of twenty (20) business

days for at least eighty percent (80%) of projects excepting those with extenuating circumstances out of the Program Team control.

- a. Notify IPA when CS turnaround time (“submission” to “reviewed”) exceeds thirty (30) business days for more than eighty percent (80%) of applications.
- b. Provide market update when CS turnaround time (“submission” to “reviewed”) exceeds forty-five (45) business days for more than eighty percent (80%) of applications.

C. Operational Oversight and Reporting

1. Evaluate and document findings and recommendations for Advance of Capital, Equity Eligible Contractor and all other applications as appropriate.
2. Track and report metrics and application statuses to IPA.
 - a. Application “Need Info”:
 - (i) Percent of reviewed applications that have gone to “Need Info” for each application type.
 - (ii) Number of “Need Info” applications that have been resolved and verified.
 - (iii) Total queue of “Need Info” applications and number of “Need Info” cases awaiting AV response and awaiting Program Administrator response.
 - b. Track project appeal requests and details and IPA determination in spreadsheet available on SharePoint.
 - (i) Conduct follow up with participants as appropriate.
 - c. Track expansion and co-located projects.
3. Process Approved Vendor requests to withdraw project applications and batches.
4. Process Approved Vendor project switch requests.
5. Manage continuous process improvements and change management for the overall application process, including:
 - a. Creating, updating, and maintaining in SharePoint Standard Operating Procedures (“SOPs”) for core application processing activities.
 - b. Revising SOPs throughout the Effective Period as needed.
 - c. Ongoing training and mentoring of Operations staff.
 - (i) All new staff will be trained on Program Portal via an established curriculum over staff’s initial two weeks.
 - (ii) Processors will be trained on application processing by experienced staff referencing established SOPs.
 - (iii) Training on any updates to the Guidebook and/or decisions requiring updates to processing will be provided to the Program Team in weekly meetings, supported by team supervisors, and through QA of applications during processing. SOPs will be edited to reflect updates accordingly.
 - (iv) Supplemental and/or repeated training will be provided as necessary to ensure understanding of processes, tools, and Program updates.

D. Project Renewable Energy Credit (“REC”) contracting and invoicing tasks will be performed in accordance with the Contracts Standard Operating Procedures.

1. Support ICC Memo Submission Process:

- a. Identify and complete quality assurance (“QA”) tasks on projects that are ready for ICC submission.
- b. Support Approved Vendor re-batching.
- c. Send emails on Part I applications that inform Approved Vendors of applications verified via the application review process.
- d. Send memo process email notifications to AVs (project was withheld, batch was submitted to ICC).
- e. Batch verified Part I applications that are ready for contracting, calculate contract data including price exceptions and assign batches to utilities to send to the ICC for approval.
- f. Generate associated REC contracts (Master REC Contracts, Exhibit As, Schedule As) and utility reports for approved ICC projects on a biweekly basis.
- g. Generate memo and reporting for ICC; Deliver memo to ICC on time based on published ICC meeting calendar.
- h. Support memo and contract corrections due to late withhold requests or other errors, as approved by IPA.
- i. Include product orders for re-approval in ICC memo due to the addition of Stranded Customer REC Adders.
- j. Track contract non-execution.
- k. Perform bi-weekly QA process on contract and Schedule A data.
2. Support Schedule B Process:
 - a. Identify and QA projects that are ready for Energization (issuance of Schedule B).
 - b. Calculate Schedule B data and generate Schedule Bs for Part II verified projects on a weekly basis.
 - c. Send Part II verification emails.
3. Support REC Invoicing Process:
 - a. Calculate and track REC invoices, including missed payments, payment suspensions, Advance of Capital, and support any Consumer Protection needs.
 - b. Track REC deliveries, surplus, ineligible, and true up RECs as they pertain to invoicing for the twenty (20)-year REC Contracts.
 - c. Generate REC invoice PDFs and Quarterly Netting Statements (“QNS”) for Energized projects by the first day of each month. Provide AV with copy of invoice and PDF.
 - d. Provide Utilities with QNS data.
 - e. Notify AVs of invoice availability via email, coordinate with utilities to send reminder emails for invoices not submitted near close of the invoicing window.
4. Ad-hoc contract generation and tracking activities:
 - a. Revised Schedule A for Scheduled Energization Date extension approvals.
 - b. Revised Schedule A, Schedule B, and Schedule C generation for project removals.
 - c. Revised Schedule A, Schedule B and Exhibit A generation for assignments and “unbatching,” and addition of Stranded Customer REC Adders.

- d. Revised Schedule Bs as a result of the subscriber verification process.
 - e. Revised Schedule Bs to support REC Reduction requests and addition of Stranded Customer REC Adders.
 - f. Revised contract documents as needed for error correction.
- 5. Monitor Scheduled Energization Dates for systems that have been ICC approved; notify Approved Vendors of the requirement to request extensions for projects not yet Energized by deadline, when applicable.
- 6. Community Solar subscription verification and reporting activities at Part II verification, and quarterly, semiannually or annually as needed per the terms of the project contract type. This includes:
 - a. Collection of data from Approved Vendors.
 - b. Verification against utility records.
 - c. Disclosure Form review oversight and cure support for Part II Verification.
 - d. Verification of contract specific subscriber requirements (for example, small or local subscribers) per the 2024 Long Term Plan.
 - e. Coordination with Consumer Protection team on Disclosure Form review results, including escalating Approved Vendors to have Community Solar Disclosure Form review occur during the subscriber verification process, as necessary.
- 7. Support the Approved Vendor reporting process twice annually:
 - a. Identify projects that are required to submit a Bi-Annual Report, coordinate on reporting with Approved Vendors, track results.
 - b. Conduct utility reporting and coordination on all activities described above.
- 8. Collect and maintain REC Exhibit B contact information for Approved Vendors and offer a secure pathway for AVs to optionally provide bank account information. Where such information exists, use it to populate Exhibit Bs before providing to utility.
- 9. Track first REC delivery deadlines, send reminders, and follow up with Approved Vendors who have not delivered a first REC by the contractual deadline.
- 10. Research, develop, propose, and implement a process to increase AV oversight and support of REC deliveries, as result of REC Delivery Working Group:
 - a. This may include regular meetings with the teams managing the Generation Attribute Tracking System (GATS) and/or Midwest-Renewable Energy Tracking System (M-RETS).
- 11. Support Restitution program in contracting process:
 - a. Submit approved restitution claims to the ICC for approval.
 - b. Generate and track restitution invoices for ICC approved restitution claims.
- 12. Support Escrow process in invoicing process:
 - a. Coordinate with IPA Consumer Protections team to update payment information on invoices where an escrow agent is to be the payee.
- 13. Track incoming Notices of Collateral Assignment, as reported by Approved Vendors, the Utilities and/or IPA; Program Administrator shall make such notices available on SharePoint.
- 14. Support Approved Vendor reporting, coordination and email communications on all activities described above.
- 15. Support Annual Report:

- a. Develop Approved Vendor communications including emails and other market-facing materials.
 - b. Generate Annual Report data (RECs by System, Systems Energized no RECs, Systems Not Energized, Community Solar Metrics, and others as recommended by Program Administrator).
 - c. Collect and track Approved Vendor Annual Report submissions.
 - d. Follow up with Approved Vendors who have not responded to the Annual Report.
 - e. Identify report discrepancies and follow up with Approved Vendors to cure.
 - f. Perform Annual Subscriber Verifications as needed per project and contract type.
 - g. Verification of commitments for energized Community Solar projects as indicated in project applications.
 - h. Calculate Community Solar and REC performance drawdowns.
 - i. Utility coordination and reporting.
- E. Program Administrator will meet with the Illinois Solar for All (“ILSFA”) Program Administrator, (“ILSFA Admin”) to coordinate activities and support data requests:
- 1. Meet with ILSFA Admin on an ad-hoc basis up to twice monthly to discuss operations including AV registrations, customer complaints, and disciplinary actions in coordination with the Illinois Shines consumer protection team.
 - 2. Process new product orders, extension requests, project removals, and assignments for the ILSFA program in addition to preparation of REC contracts.
 - 3. Coordinate with utilities to discuss ILSFA portal capabilities.
 - 4. Maintain ILSFA program data for activities managed by Illinois Shines.
 - 5. Coordinate on REC calculations, contract updates, and document management.
 - 6. Develop specifications and develop select portal capabilities for the ILSFA program (for example, utility access to view/download contracts, invoices).
- F. Project inspections (physical or virtual) will be scheduled by the Program inspection team with the underlying customer and AV for projects participating in the Program, ninety (90) days or thereafter Part II application verification.
- 1. Inspectors will follow the Project Inspections SOP including performing the review of an established list of project criteria documented in the data collection tool. The data collected will support the identification of project deficiencies.
 - a. The inspection results will be communicated to the customer and AV using the inspection results template, including a Deficiency Notice that will outline material deficiencies that require curing by the customer and AV.
 - b. The inspection team will coordinate with sector strategists to ensure deficiencies are cured.
 - 2. The project inspection lead will evaluate project inspections process, tools, and reporting implemented in previous Program cycle to identify areas of improvement.
 - 3. Inspections will be conducted on:
 - a. At least one of each new AV’s¹ first five Part II verified applications to ensure

¹ New AVs are those who had not participated in the Program prior to July 2022 and/or have had no previous

compliance with Program requirements and guidelines, regardless of project size.

- b. Small Distributed Generation (“Small DG”) less than or equal to twenty-five kilowatts (≤ 25 kW): Inspect one and a half percent (1.5%) of verified Part II applications.
 - c. Large Distributed Generation (“Large DG”) and Public Schools greater than twenty-five and up to five thousand kilowatts (> 25 -5000 kW): Inspect five percent (5%) of verified Part II applications.
 - d. Community Solar: Inspect twenty-five percent (25%) of verified Part II applications.
- 4. Inspections will be performed on projects at the request of the IPA Consumer Protection team. The scope of such inspections may extend beyond the standard inspection checklist to cover additional issues or aspects of the solar project or installation.
 - a. As needed, inspections of specific sites will be identified upon mutual agreement by Program Administrator and IPA.
 - b. If a deficiency is identified at inspection, the AV will have 60 days to take corrective action. Inspection reports without corrective action requested will be delivered to the customer within thirty (30) days of inspection. Inspection reports with corrective action requested will be delivered within ninety (90) days of inspection and will include any corrective action that was taken.
 - 5. Provide a monthly report on inspection metrics to IPA within two weeks of the end of the prior month. The report will contain the following:
 - a. Number of inspections with application ID, AV, and utility, conducted.
 - b. Number of reports provided to customers and AVs.
 - c. Details of any deficiencies identified and the plan to cure.
 - d. Highlighting of any trends stemming from inspections.
- G. Utility Engagement
- 1. Host a monthly (at a minimum) engagement with utilities to coordinate Program activities.
 - 2. Enhancements to Utility access to project and contract information via SharePoint and the Application Portal will be prioritized and.

Task 4: Consumer Protection Activities

- A. Complaint, Pre-Disciplinary, and Disciplinary Procedures. As volumes of complaints, issues and correspondence change from assumptions, Consumer Protection team will coordinate with IPA and make staffing updates as mutually agreed.
 - 1. Handle complaint and inquiry intake, mediation, and resolution process.
 - 2. Track complaints, potential and confirmed Program violations, deadlines, pre-disciplinary actions, disciplinary actions, suspension terms, discipline-related portal restrictions, and reinstatements, including updating all publicly available reports and databases that house this information.
 - a. Address customer complaints in accordance with the established key

projects inspected by the Program prior to July 2022.

performance indicators (“KPIs”) This includes responding to eighty percent (80%) of complaints within two (2) business days and ninety-five (95%) of complaints within three (3) business days.

3. Produce monthly reports for internal IPA review documenting complaints received and resolved.
4. Draft Annual Complaints & Disciplinary Action Report.
 - a. Support IPA’s filing of Annual Complaints & Disciplinary Action Report with ICC by February 27, 2026.
5. Draft and issue disciplinary-related letters and informal outreach in consultation with the IPA.
6. On an as needed basis, implement and update the following existing SOPs and internal guidance documentation for consumer protection activities:
 - a. Complaint Intake/Inquiry Intake Process and Script SOP:
 - i. Execute complaint intake, investigation, mediation, and resolution procedures, ensuring adherence to mutually agreed-upon KPIs.
 - b. Disciplinary Action SOP:
 - i. In concert with the IPA, implement appropriate non-disciplinary and disciplinary action against market participants and non-Program entities (including Program Portal restriction and reinstatement process for suspended entities) regarding apparent – and confirmed – violations of consumer protection and other Program requirements (e.g., MES noncompliance, Approved Vendor and Designee renewal, etc.).
 - ii. Monitor entities’ adherence to requirements included in Compliance Plans, as needed.
 - c. Late-signed Disclosure Form SOP:
 - i. On a monthly basis, review all Disclosure Forms associated with Part I verified application where the Disclosure Form appears to have been signed after the relevant contract. Pursue informal outreach or pre-disciplinary action for any identified noncompliance.
 - d. Disclosure Form Integrity SOP:
 - i. Perform review of Disclosure Forms every two months to ensure compliance with Program requirements regarding DG Purchase, Lease and Power Purchase Agreement (“PPA”) forms. IPA and Program Administrator will mutually agree on the percentage of submitted Disclosure Forms to be reviewed for compliance. Pursue informal outreach or pre-disciplinary action for any identified noncompliance.
 - e. Stranded Customer SOP:
 - i. Execute existing SOP (and update SOP as needed) to assist stranded customers (as defined in the Standard Customer SOP) at all stages of the application process.
 - ii. Strategize on ways to expand Stranded Customer short list and communicate with entities interested in joining the short list.
 - iii. Regularly communicate with entities assisting stranded customers.
 - iv. In collaboration with the contracts team, implement the unbatch and reassignment process, as necessary, to assist stranded customers.
 - f. Designee Management Plan SOP implementation:

- i. Request/review up to five Designee Management Plans per month as necessary as determined in collaboration with IPA.
 - g. Update Consumer Protection Website SOP.
 - h. CP Hold SOP:
 - i. Execute existing SOP to ensure applications with consumer protection concerns are paused in the application verification process; liaise with application processing team consistent with the SOP.
- B. Additional SOPs for consumer protection activity:
- 1. New Disclosure Form Rollout (if needed prior to 2026-27 Program year, as determined upon mutual agreement).
- C. Develop and maintain additional web-based materials to assist consumers and AVs/ Designees with understanding of and compliance with consumer protection aspects of Program (e.g., updates to Disclosure Form frequently asked questions (“FAQs”), development of stranded customer FAQs, and tutorial on disciplinary process).
- D. Lead weekly Illinois Shines Consumer Protection Meeting with IPA to escalate and recommend non-disciplinary and disciplinary courses of action for potential and confirmed Program violations and discuss ways to improve overall consumer protection effectiveness.
- E. Conduct regular development and/or updates of Customer Protection resources as agreed upon between Program Administrator and IPA.
- F. Implement any voluntary escrow process for specific/individual AVs based on need, meeting of pre-requisites (by both AV and escrow agent) set by IPA, and as decided upon mutual agreement by both the IPA and Program Administrator.
- 1. Modify SOP, as needed, for efficient implementation and, potentially, if there is a change to the escrow agent.
- G. Implement new consumer protection initiatives outlined in 2024 Long-Term Plan.
- 1. Implement Escrow Process:
 - a. Carry out day-to-day implementation of the escrow process, consistent with developed SOP.
 - b. Modify SOP as needed for efficient implementation and to address changes in policy and/or procedure, in consultation with IPA.
 - 1. Implement REC Adder for Stranded Customer Support:
 - c. Carry out day-to-day implementation of the REC Adder process, consistent with developed SOP.
 - d. Finalize and/or modify SOP and internal tracking documents as needed for efficient implementation and to address changes in policy and/or procedure, in consultation with IPA.
 - e. Publish public-facing rationale document regarding the REC Adder initiative and announce launch of the REC Adder, an incentive to assist AVs that support stranded customers.

2. Implement and evolve Solar Restitution Program:
 - a. Carry out day-to-day implementation of the Solar Restitution Program, consistent with developed SOP.
 - b. Modify SOP as needed for efficient implementation and to address changes in policy and/or procedure, in consultation with IPA.
 - c. Collaborate with IPA on potential expansions for Solar Restitution Program to cover new types of economic harm and/or to expand existing customer and/or AV/Designee caps. This collaboration may include stakeholder feedback, rationale document publication, SOP revisions, and other process changes.
- E. Lead development and implementation of a customer satisfaction survey for DG Lease/PPAs and Community Solar customers with oversight and support from IPA:
 1. Conduct small focus groups of survey respondents to gain more market insight into consumer experiences and help identify potential new avenues for consumer protection and education.
- F. Update public-facing Complaints Report and Program Violations Report per the Consumer Protection Website Updates SOP maintained on Program Administrator's SharePoint site every two weeks.
- G. Update Program Consumer Protection Handbook as needed, at least once annually for preparation of Program Year opening.
- H. Perform user acceptance testing ("UAT") on Disclosure Form and related Portal updates, as needed.
- I. Review applications for use of API to ensure Disclosure Form requirements are met.
- J. Monitoring of Market:
 1. Perform ongoing review of Designee websites, marketing and social media content to determine compliance with Program requirements.
 2. Conduct legal/regulatory review of AV applications and renewals in accordance with SOP.
 3. Continue exploring ways to further inform assist, support and educate Approved Vendors and Designees on consumer protection-related issues.
- K. Consumer Protection Working Group:
 1. Develop agenda and lead regular Expanded Consumer Protection Working Group meetings, and post notes on IPA website and SharePoint.
- L. Lead monthly Consumer Protection Agency Working Group meetings.
- M. Liaise with Illinois Solar for All (ILSFA) Admin regarding Consumer Protection-related issues and coordinate regarding consumer protection issues with entities participating in both ILSFA and Illinois Shines.

Task 5: Market Strategy and Outreach

A. Provide proactive support for approximately 700 Approved Vendors AVs and their Designees. These tasks include:

1. Approved Vendor network management and Designee registration management:
 - a. Update sector outreach plans to continue the frequent, customized support of AVs. Establish relationship with GATs and M-RETS to support AV reporting requirements.
 - b. Establish or update Program contacts for each Approved Vendor including offering/continuing AV one-on-ones.
 - c. Assign and respond to Approved Vendor communications.
 - d. Track and report monthly communications metrics to client.
 - e. Continue AV support for annual/bi-annual/bi-annual reports and other Program deadlines and requirements.
 - f. Update AV, Designee and Equity Eligible Contractor (“EEC”) Subcontractor Registration SOPs.
 - g. Receive, vet and approve AV applications and renewals and Designee registrations and renewals.
 - h. Streamline Single-project AV application and renewal process.
 - i. Receive, vet and approve EEC Subcontractor applications.
 - j. Support new EECs by offering one-on-one (1:1) meetings and encouraging them to apply to the Mentorship Program.
2. Support development of AV Learning Hub and Develop AV Training Materials:
 - a. Develop or relocate existing AV resources to add a “Learning Hub” webpage on the Illinois Shines website that will house all AV training materials and Program resources.
 - b. Create and host up to two cultural competency trainings to educate AVs and Designees on equitable workforce best practices in recruiting, hiring and retaining Equity-Eligible Persons (EEPs), and in developing relationships with Equity Eligible Contractors (EECs).
 1. One training to educate AVs and Designees on equitable workforce best practices in recruiting, hiring and retaining EEPs; and
 2. One training on best practices in developing relationships with EECs.
 - c. Development of up to four new resources (including one-pager reference documents, case studies, or other resources) to be mutually determined by Program Administrator and the IPA.
 - d. Continue to develop new AV onboarding resources as mutually agreed upon between IPA and Program Administrator.
 - e. Develop and host webinars. The number of webinars will be mutually determined by Program Administrator and the IPA. Webinar topics will include REC contracts training amongst any other topics agreed upon by the Parties.
3. Implement year two of the Mentorship Program in accordance with the following mutually agreed upon implementation expansion plan.
 - a. Two training cohorts offered annually with up to twenty (20) mentees per

- cohort.
- b. Provide mentor support during each training.
- c. Organize and implement two networking events.
- 4. Collaborate with consumer protection team on AV and Designee disciplinary matters including conducting informal outreach or sending Notice of Potential Violations (“NOPVs”) to participating AVs or Designees for violations or concerns in advance of a disciplinary-related letter consistent with the Program’s disciplinary SOP.
- 5. In coordination with IPA DEI team, conduct outreach to Equity Investment Eligible Community (“EIEC”) areas and public schools and offer Illinois Shines Program presentations as requested.
 - a. Any outreach performed under this sub task will be performed in compliance with the State of Illinois Gift Ban.
- 6. Continue to support each project category (Public Schools, EEC, Small DG, Large DG and Community Solar), including:
 - a. Facilitate submission and performing the review of Advance of Capital requests.
 - b. Conduct Traditional Community Solar (“TCS”) and Community-Driven Community Solar (“CDCS”) random selection events.
 - c. Collect AV feedback on the Illinois Shines program and its administration by hosting the following:
 - i. Up to four AV roundtables (virtual meetings in which participants are encouraged to provide input on program administration processes and barriers to participation).
 - ii. Quarterly sessions with EECs to receive feedback.
 - iii. Weekly Office Hours.
 - iv. Monthly one-on-one meetings with AVs.
 - d. Deploy annual AV/Designee program satisfaction survey and submit annual comparative analysis to IPA.

B. Market DEI Tasks

1. Implement Minimum Equity System (“MES”) compliance processing and reporting:
 - a. Review and rate Program Year (“PY”) 2024-25 Year End Reports.
 - b. Provide IPA summary and analysis of PY 2024-25 MES Year-End reports and process.
 - c. Review and rate AV/Designee PY 2025-26 Compliance Plans.
 - d. Provide IPA summary and analysis of PY 2025-26 Compliance Plans.
 - e. Review and provide IPA summary and analysis of AV/Designee PY 2025-26 Mid-Year Reports.
 - f. Prepare for AV/Designee PY 2025-26 Year-End Reports processing.
 - i. Offer an MES webinar prior to reporting period; include an updated list of workforce programs as needed (Program Improvements Roadmap item).
 - g. Prepare for PY 2026-27 MES Compliance Plan submissions.
 - h. Review and rate MES waivers.
 - i. Review, rate and monitor MES Corrective Action Plans.
2. Collect and deliver business type and project workforce demographic data via MES Year-End reports.
3. Update and implement Supplemental Outreach Plan in coordination with IPA DEI

- team outreach efforts. Implementation tasks to include:
 - a. Monitor the Illinois Department of Commerce and Economic Opportunity (“DCEO”) workforce development hubs.
 - b. Continue developing relationships with equity-focused and workforce development community-based organizations in Environmental Justice Community (“EJC”) Communities.
 - i. Offer program presentations to EJC community stakeholders to provide an overview of the Program, and an explanation of the EEC and Community-Driven Community Solar categories.
 - c. Any outreach performed under this sub task will be performed in compliance with the State of Illinois Gift Ban.
- C. Conduct public school outreach to schools in collaboration with IPA; host a public schools webinar and follow-up workshops with interested public schools.
 - 1. Any outreach performed under this sub task will be performed in compliance with the State of Illinois Gift Ban.
- D. Partial team attendance at solar industry, EJC, and workforce development events that may include but not limited to the below. Attendance at other events must be approved in writing by IPA and be in compliance with the State of Illinois Gift Ban.
 - 1. Midwest Solar Expo
 - 2. Annual Innovation Summit Conference (hosted by CCSA)
 - 3. Illinois Renewable Energy Conference
 - 4. RE+ Midwest
 - 5. Midwest Solar Farm Summit
 - 6. DCEO Workforce Development and related community-based organization events
 - 7. Community events located in EJC as assigned
- E. Update and maintain all strategy team SOPs and support updates to Program reference materials including the Guidebook, LTP and website, as needed.

Task 6: Marketing and Communications

- A. Program Announcements - On-going:
 - 1. Draft, review, and publish weekly, special, and segmented Program email announcements to subscribers and website posts (not inclusive of new, customer-oriented announcement platform).
 - 2. Draft, review, and deploy *State of the Program Report* two times per Program Year.
 - 3. Support and publish *Program Year 2024-25 End of Year Report*.
 - 4. Support and publish monthly *Illinois Shines Data Report*.
- B. Digital Content Development and Maintenance
 - 1. Continuously maintain and improve illinoisshines.com website content.
 - a. Post/create updates, reports, guides, resource documents and other material provided by the implementation team and IPA.
 - b. Alter and add web content as necessary to accommodate updates and user journeys.

- c. Maintain core site functionality and security; explore supplemental upgrades and enhancements as needed.
 - a. Language translation – Multi-lingual translation toggle for website as agreed.
 - d. Google Analytics and Insights – Development of site analytics and accompanying insights and recommendations.
 - e. AV Learning Hub – Create improved user journey and organization of existing and future AV resources (PDFs, videos, webinars, PowerPoints) on Program website, for new and prospective AVs and Designees.
 - 2. Develop new consumer- and workforce-facing social media presence supporting participant acquisition, education, and consumer protection.
- C. Program Materials:
- 1. Support the design and formatting of the Program Guidebook, Consumer Protection Handbook, (<https://illinoisshines.com/program-documents/>) and contracts requirements as directed by Program Team and IPA.
 - 2. Maintain existing program collateral as needed (e.g., core program brochures); support development of up to four additional flyers.
 - a. As directed, and with approved scope and pricing, arrange translated versions.
 - 3. With IPA's Consumer Protection team, support development of Homeowner Handout and other consumer-oriented resources.
 - 4. Apply Program branding to official Program forms, documents, vendor badges, etc.
 - 5. Propose and implement language translations for collateral and program documents as agreed, including scope and cost approval as necessary.
- D. Vendor and Market Support:
- 1. Support known webinars (topics including Program Year opening, Minimum Equity Standard, Random Selection Events), trainings, meetings, annual AV roundtables, stakeholder office hours, and monthly and ad hoc work groups. This includes anticipated support of new events and materials for new initiatives.
 - 2. Support EEC Mentorship Program (multi-part series) with primary role on associated communications, application, meeting invitations, content editing and design, virtual event facilitation, in-person networking event and materials, and post-event publications.
 - 3. Support design of approved, market-facing technical documentation, help guides, videos, and market reports (e.g., Mentorship Program, AV/Designee and Consumer Survey summaries, etc.) including development of the Learning Hub including new and re-located resources.
- E. Program Publicity (Coordination with IPA communications and IPA Illinois Shines Program teams):
- 1. Maintain the Program's media kit.
 - 2. Support media readiness and response processes including supporting inbound media or legislative inquiries and external pitches from IPA.
 - 3. Support inclusion of Illinois Shines content in IPA internal and external newsletters,

- social, or other platforms upon request.
4. Support identification and submission of conference presentations, articles, award submissions and other recognition.
 5. Support outreach, identification, and development of program case studies, success stories, and testimonials to positively promote program participation.
- F. Define and support participant acquisition activities, including development and delivery of market outreach strategies and services toward:
1. Increased AV participation in underperforming sectors or growth priorities, including consultative assessment of opportunities, discussion of current efforts, and strategy/planning/execution supporting events, advertising, content, collateral, case studies, testimonials and more. E.g., awareness and participant recruitment activities focusing on:
 - a. Public Schools opportunity development with the Program Administrator strategy team, including development and execution of workshops, and new collateral/technical resources.
 - b. EEC recruitment including EECs, EEC Designees, EEC Subcontractors.
 2. Support of outreach efforts for Equity Eligible Persons driving MES targets.
 3. Increased consumer and community awareness, engagement, and education, including:
 - a. Digital advertising and other publicity to drive traffic to web resources.
 - b. Drive community awareness of program in support of project development and Climate and Equitable Jobs Act (Public Act 102-0662) (CEJA) equity and Equity Investment Eligible Community requirements.

Appendix 9

Transition Matrix

Base Assumption Informing the Matrix Below: Both Program Administrators supporting the programs are being replaced, with some elements of transition occurring simultaneously and others that may not. A 2-part transition will be required with one part focusing on IL Shines-specific transition elements and the second being ILSFA transition elements. The RFQ considered ILSFA transitioning first, with IL Shines second; however, that was a tentative recommendation only. The matrix below considered IL Shines primarily transitioning first, with ILSFA generally second. While the matrix considers a staggering of transitional elements across both programs, this is **not** a mandate. Instead, an Offeror can propose alternative approaches, sequencing, and timing within the bounds established by the RFP (e.g., portal stood-up by January 1, 2027 and full transition by June 30, 2027). Information provided below, in the sequence provided, is intended to be informational only.

COLOR KEY: Transition Work = Orange Fully Operational (w/ new PA) = Green Moving from Transition to Operation or part of ongoing work product = Blue	Fiscal Year						Notes
	Remaining FY26		FY27		FY28		
	April - June 2026		July 2026 - June 2027		July 2027 - June 2028		
	IL Shines	ILSFA	IL Shines	ILSFA	IL Shines	ILSFA	
Program Management							
Program Oversight							detailed workplan for the year
Staff/Staff Management							staff hiring/onboarding; maintain system/tool accesses; ensure employee efficiency, work products, achievement of milestones/deliverables,
Meetings & Reporting							host IPA-PA meetings/collaboration (weekly/biweekly, etc.); provide detailed program updates (metrics, program statistics, etc.); conduct regular sub-program admin meetings (e.g. operations, information systems, etc.); conduct IPA-PA leadership meetings; conduct quarterly accomplishments/challenges meetings; BEP reporting
Invoicing							Monthly (both Program Administrator and supporting sub-contractor invoices)
KPIs							Program-specific KPIs and Program Admin-specific KPIs
Data & Analytics							data update to the website; creation/release of public reports; update/refresh dashboards and IPA data access; program forecasting (application submissions, reviewed, etc.)
Program Manual							manual updates (targeted deliverables)
Regulatory & Policy							Includes Program Guidebook updates; provide IPA feedback on Long-Term Plan development; provide IPA feedback on prospective legislative topics
Portal Operations & Management							
Vendor portal build/integration/updates							data validation, system efficiency improvements, QA/QC management/tracking, records/data redesign and management,
Maintenance & operations							data imports/exports; removal/addition of user accesses; server maintenance; server hosting; SSL Cert. of Authority; annual domain name registration(s); hardware firewalls/load balancer O&M; 24/7 network operations center monitoring; data/system back-ups; security and disaster recovery; service subscriptions
Portal technical support							email/phone support during BD 9a-5p central
data archiving							Maintain back-ups of data into Salesforce (daily back-ups); ensure data limits are not exceeded; easy access to archived data
Technical training/documentation							Development of technical SOPs and supporting documentation; user training
reporting (system security, compliance/SOC2)							Report on security issues (high priority), including reports and incident updates; provide certified SOC 2 annually
Program Operations Activities							
Customer Support							maintain call center (9-5 CT M-F); includes specifics on call logging, managements, etc.
Application Processing							Detailed Part I and II application processing specs; application fee processing; deficiency management; QA testing (IL Shines, at least 10% of submitted Part I/II apps); maintain SLA/Batch turn-around specs
Oversight and reporting							Track and report on key metrics; processing AV requests; implement continuous process improvements/change management
REC contracting & invoicing							REC tracking; ICC Memo submission, Schedule B process, REC invoicing process, and other ad hoc contract items; monitor project energization; CS subscriber verification; REC delivery management/oversight/reporting; restitution support; management of notices of collateral assignment; Annual Report
Coordination Activities							Coordination of activities across Programs & to support data requests (IL Shines-ILSFA); Monthly engagement with utilities; discussion of/resolution of issues and program updates with utilities
Project Inspections							SOPs; development/implementation of protocols; inspection details/requirements; deficiency notifications/reporting; metrics
Consumer Protections (CP)							
complaint management and procedures							complaint management, tracking, reporting (real-time & monthly reports, and Annual report); letter drafting
SOPs							SOP drafting for a host of topics. Development of new SOPs, maintenance/update of existing
Meeting management							Lead weekly calls; manage issue escalation; propose issue resolution
Escrow process management & implementation							includes development/implementation/update of SOPs
implement new CP initiatives							
Surveys & Reporting							update public-facing reports (complaints report, program violations report); complete customer satisfaction survey

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	April - June 2026		July 2026 - June 2027		July 2027 - June 2028		
	IL Shines	ILSIA	IL Shines	ILSIA	IL Shines	ILSIA	
CP Handbook							Define updates/alterations/improvements, vet with IPA and Stakeholders, complete updates (and formally track histories for future reference)
Disclosure Form							Review narrative, complete updates, review portal changes/forms
Systems & Web updates							technical (systems) updates; UAT; implement/review APIs; updating web-based assistance materials (e.g. FAQs or other documents/comms)
Coordination Activities, Working Groups, and Market Monitoring							collaboration and consistency of approaches across Programs: CP WG - lead meetings (agenda, scheduling, collaboration, etc.)
Market Strategy & Outreach							
active/proactive outreach activities							AV network management/cultivation/registration; AV learning hub and AV training materials; mentorship program; EIEC activities; active support of project categories; attend industry events/conferences
market DEI talks							MES compliance process & reporting; collect demographics; dev/implement/manage supplemental outreach plan
targeted proj. category activities							seeking to improve due to changes in category, poor performance, etc.
SOPs							Develop, implement, maintain
Marketing & Communications							
Program announcements							drafting/review/publish; lead efforts for weekly and special announcements; report notification announcements/comms
digital content dev/implement/maintenance							website management; social media content and interaction
program materials							design/format Program guidebook, CP Handbook, contract requirements; external material development (e.g. flyers, handouts); application of branding on materials; language translation services
vendor/market support							webinar support; EEC Mentorship Program lead support; marketing materials
publicity of program							media kit; availability to support rapid response needs; support IPA internal content development (news letters, social, etc.)
participant acquisition & engagement							Support efforts to improve participant engagement/participation;
Subcontractor activities							
define subcontractor work							define as it relates to SoW (ensure no duplication and efficient activities); also ensure achievement of U-Plan targets and activities
Special Projects/Initiatives							
Grassroots Educator	NA		NA		NA		define as it relates to SoW (ensure no duplication and efficient activities); also ensure achievement of U-Plan targets and activities
Small & Emerging Business							workforce engagement
DEI Initiatives							DEI Survey; adhering to DEI reporting; DEI metric; hosting quarterly IPA discussions
LAA coordination & outreach/facilitation	NA		NA		NA		