

Designee Management Plans, Long-Term Plan Update, TCS Timeline for 2023-24 Projects

August 11, 2023

Program News

- **Designee Management Plans** - Section X.B.1 of the Consumer Protection Handbook states that “[e]very Approved Vendor that works with or uses Designees is required to have and follow a Designee Management Plan as of September 1, 2023,” and provides details on required plan components. The Program Administrator shared additional guidance on this requirement on [August 9, 2023](#). With the **September 1, 2023**, deadline fast approaching, AVs are encouraged to reach out to the Program Administrator at admin@IllinoisShines.com with any questions in meeting this Program requirement.
- **Long-Term Plan Update** - As previously [announced](#), the IPA issued the first two sets of requests for stakeholder feedback on various chapters of the Long-Term Plan (see Stakeholder Feedback chart below for chapter details). The Agency anticipates the next steps in this process with the following schedule. Stakeholders should look out for the published draft Long-Term Plan and as a reminder, comments will be due to the Agency on September 29, 2023.
 - Final Draft Release for stakeholder feedback - August 15, 2023
 - Stakeholder comments due to IPA - September 29, 2023
 - Filing with ICC - October 20, 2023
 - ICC Order Expected - February 19, 2024
- **Update on Certification of EEC AVs and Designees** - As announced in the [July 21, 2023 announcement](#), EEPs (Equity-Eligible Persons) that currently serve as the majority-owner of an EEC (Equity Eligible Contractor) AV may not submit additional requests to certify EEC AVs for which they serve as the majority-owner EEP, except for the case of Single-Project AVs. The IPA has received inquiries requesting if EEPs are permitted to register a company that is an EEC as both an AV and Designee. A single EEC may register as both an AV and a Designee within in the Program. An EEP may serve as the majority owner of an EEC AV that is also registered as a Designee, but may not serve as majority owner of a second company to register that company as an EEC Designee. To clarify further, an EEP may only serve as an EEP for one EEC-certified company.

The IPA has concluded that it does not further the objectives of the Equity Accountability System for an individual EEP to serve as the majority-owner for multiple Equity Eligible Contractors, whether these EECs are AVs or Designees. EEPs that currently serve as the majority-owner of an Equity Eligible Contractor AV or Designee may not submit additional requests to certify more than one company for which they are a majority owner as an EEC.

The IPA will incorporate this approach into the Draft Long-Term Plan being published for public comment on August 15, 2023, but will also apply it immediately, so as to avoid having to revoke any Equity Eligible Contractors certifications that may otherwise be approved before consideration of the issue by the ICC. Stakeholders are welcome to provide feedback through comments on the Draft Long-Term Plan.

- **Traditional Community Solar (TCS) Timeline for Projects submitted June 1, 2023** - The Agency anticipates 2023-2024 TCS project selection to follow the steps below, pending prompt responses from AVs. Projects submitted to Group A will be waitlisted and need to score a minimum 5 points to be added since there is 0 MW of capacity available. Projects submitted to Group B will be selected for capacity after November 2, 2022- May 31, 2023 scored projects. Capacity for Group B TCS will be 114.62 MW (unallocated capacity available upon the 2023-24 Program Year opening) minus the capacity of projects submitted to the Program between November 2, 2022- May 31, 2023.
 - August 23, 2023 – Release scores, begin two-week appeal period
 - September 6, 2023 – Deadline for AVs to submit appeals to Program Administrator

- September 18, 2023 – Appeal determinations released to AVs and any changes to scores will be published on the website
- September 20, 2023 – Random selection event for projects with tied scores
- September 22, 2023 – Final scores published
- **Illinois Power Agency Webinar: *Bring Solar to School: Benefits, Challenges, and Opportunities*** - Please join the Illinois Power Agency on **Thursday, August 31 at 12:00 p.m. CST** for the Power Hour Webinar, *Bring Solar to School—Benefits, Challenges, and Opportunities*. Speakers for the webinar include Audrey Steinbach, Senior Program Manager for Illinois Shines; Matt Seaton, Chief Financial Officer, Illinois State Board of Education; Gabriela Martin, Program Director (Energy), Illinois Clean Energy Community Foundation; and Mia Korinke, Campaign Mobilization Director, Climate Jobs IL. During the webinar, the speakers will highlight how public schools (K-12) can take advantage of state incentives to install solar. In addition, the speakers will discuss challenges that schools face to go solar, as well as highlight opportunities and best practices for solar adoption. Register link:
https://us06web.zoom.us/meeting/register/tZlvcO-pqTsuE9VjgesFJ_eXbUmYfqi_V9fA#/registration
- **Program Year 2023-2024 Community-Driven Community Solar (CDCS)** - The CDCS application window for the 2023-2024 Program Year closes August 30, 2023 (90 days after start of Program Year). Please see Section 5 of the Program Guidebook for more information. Applications will not be accepted after close of the application window until the next Program Year. Waitlisted projects from the 2022-2023 Program Year will receive 2023-2024 capacity. After capacity is awarded to those projects, there will be 1.5 MW of capacity available for Group A (all 2023-24 projects will go on a waitlist if point minimum is reached) and 17.53 MW of capacity available for Group B projects submitted in the 2023-2024 Program Year. There was an error in the reported capacity from last week’s announcement that has since been corrected. **The block capacity dashboard will be updated on the website to reflect these values.** The [August 4, 2023](#) announcement included reminders for a successful CDCS application submission.
- **Part II Verification Cut Off for August** - To allow time for invoice calculation and generation, the last valid Part II Verification date for August will be August 25, 2023. Applications that are Part II verified on or before August 25, 2023 will be included in the September invoicing period. Application processing will continue throughout the last week of the month and any applications that are reviewed between August 26, 2023 and August 31, 2023 will be invoiced in October. **For CS projects, due to additional invoice calculations that need to be done, the last valid Part II Verification date for August will be August 18, 2023.**
- **EEC Program News** - Recent Equity Eligibility Contractor (EEC) updates have included the following:
 - **EEC Developer Cap** - Initially posted on [July 14, 2023](#)
 - **Update on Certification of EECs** - Initially posted on [July 21, 2023](#)
 - **Clarification on Advance of Capital Requests for EECs** - Initially posted on [July 28, 2023](#)

Application Processing Updates

- **Application Processing Tables** - The Program Administrator updates the application processing tables at [IllinoisShines.com/project-application-reports/](https://illinoisshines.com/project-application-reports/) on Mondays, Wednesdays, and Fridays. For questions about specific project applications, please contact the Program Administrator at admin@IllinoisShines.com.

Ongoing Program Portal Updates

- Ongoing portal updates and a library of portal help guides can be found at illinoisshines.com/portal-updates-help-guides/

Updates on Portal Issues, Improvements, and Future Releases

- The planned system maintenance windows on **Tuesday and Thursday evenings (from 8:00 p.m. to 10:00 p.m. CPT) will extend through August.** During these maintenance windows, the Portal is expected to be unavailable to users, which the Program Administrator and Agency hope will be minimally disruptive to Program participants. **Any users working in the portal should save their work prior to the 8:00 p.m. CPT start of the system maintenance window each day, as any unsaved information will be lost when the system is moved into maintenance mode.** In the event

that portal restoration is unexpectedly incomplete as of 10:00 p.m. CPT on a given evening, an update notice will be sent to AVs and Designees.

Development Focus	Details	Planned or Actual Delivery
Enhancements, Features and Bug Fixes		
Sort and Filter capabilities added to list view of Disclosure Forms.	The list of DFs displayed to AVs and Designees has been updated to allow sorting and filtering. Filters can now be applied by entering search criteria directly into the header row for the column you want to filter by, and sorting can be applied by clicking on the column's arrow icon. This view can be accessed from the main menu under Vendor> Disclosure Forms> View and Designee> Disclosure Forms> View.	August 10, 2023
Additional columns displayed in list view of Disclosure Forms (Customer Name and Address).	The list of DFs displayed to AVs and Designees has been updated to now include two additional columns to display the customer/subscriber name and address to aid in navigation and identification. Both columns are sortable and searchable. This view can be accessed from the main menu under Vendor> Disclosure Forms> View and Designee> Disclosure Forms> View.	August 10, 2023

Requirements and Reminders

- **Stakeholder Feedback** - This table outlines current and forthcoming proposals and feedback requests:

Proposal or Feedback Topic and Link to Details	Request for Comment Released	Deadline for Comment	Results or Updates to Request
Draft 2024 Long-Term Renewable Resources Procurement Plan	August 15, 2023	September 29, 2023	Link to be posted next week

- **Mentorship Pilot Interest Form** - The Agency and Program Administrator will launch a Mentorship Pilot program in Fall 2023, with the goal of fostering relationships between market participants and empowering small businesses, Diverse Business Enterprises (DBEs), and Equity Eligible Contractors (EECs) with the tools and training to successfully participate in Illinois Shines. Entities interested in participating in the Mentorship Pilot are asked to complete a form available at <https://forms.office.com/r/dMTyxVvLji> by **September 1, 2023**. There are a limited number of slots available for the first cohort of the Mentorship Pilot, and mentees will be selected on a first come, first serve basis.
- **DG DF API Working Group - Call for Participation and Feedback** - The Agency and Program Administrator seek engagement from stakeholders regarding usage, functionality, and feedback on the development of a Distributed Generation (DG) Disclosure Form (DF) API (Application Program Interface) to be incorporated into the Program portal; a Community Solar DF API was recently added to the Program portal. AVs and Designees interested to participate in a Working Group guiding development on the new API functionality, scheduled to launch shortly, should email the Program Administrator at admin@illinoisshines.com by **August 14, 2023**, though participation will be welcomed beyond that date.
- **IPA Issues Request for AVs and Installer Designees Interested in Serving Stranded Illinois Shines DG Customers** - As previously [announced](#), the Program continues to review submissions on a rolling basis for entities interested in serving stranded customers, with particular interest in identifying AVs and/or installer Designees willing to assist stranded customers with project maintenance/repair work. Please see the full [Request for AVs and Designees](#), including details regarding the opportunity to support stranded customers, eligibility requirements, and anticipated responsibilities.
- **Re-Submitting Disclosure Forms** - As a reminder, customers may not submit edits or re-submit DFs to the Program Administrator. AVs and Designees are asked to remind customers to direct DF questions to them. AVs and Designees must manage re-submissions of DFs to the Program portal.
- **Program Administrator Office Hours** - Existing and prospective AVs and Designees who have Programmatic questions, project application inquiries, or are experiencing technical difficulties the portal or other Program or seek support in resolving other challenges are invited to attend open Office Hours offered by the Program Administrator via Zoom each week, using a waiting room format to support meetings with individual AV or

Designee teams for privacy. Upcoming Office Hours and join link: <https://energy-solution.zoom.us/j/95588710302Co>

- Wednesday, August 16, 10:00 a.m. – 11:00 a.m. CPT
- Wednesday, August 23, 10:00 a.m. – 11:00 a.m. CPT
- Wednesday, August 30, 10:00 a.m. – 11:00 a.m. CPT

REMINDER: All Program updates can be found on the [Program Updates webpage](#), and a new [Vendor Forums & Key Dates](#) page at the Program website provides a calendar of upcoming webinars, meetings, support, feedback requests, key dates, holidays, and more. Please visit [IllinoisShines.com/vendor-forums-feedback/](https://illinoisshines.com/vendor-forums-feedback/) for continuous updates.

CONTACT US: For portal, application, or Program-specific questions and inquiries, please contact admin@IllinoisShines.com or call 877-783-1820.