

**EXPANDED CONSUMER PROTECTION WORKING GROUP AGENDA**

**Friday, September 1, 2023**

**Poll Question Series 1:**

Which marketplace participant best describes you? (participated)	21 of 34 participants (61%)
Approved Vendor	29% (6/21)
Designee/Nested Designee	10% (2/21)
Consumer	0% (0/21)
Government Agency	33% (7/21)
Non-Profit Advocacy/Community Group	24% (5/21)
Prospective Approved Vendor/Designee	0% (0/21)
Other	5% (1/21)

TOPIC 1	Draft 2024 Long-Term Plan
<b>BACKGROUND</b>	<p>On August 15, 2023, the Illinois Power Agency <a href="#">released</a> the draft 2024 Long-Term Plan for public review and comment. The draft 2024 Long-Term Plan details the goals and strategies for the IPA’s renewable energy programs and procurements, including program capacity and renewable energy credit pricing for the Illinois Shines and Illinois Solar for All programs over the 2024-2025 and 2025-2026 Program Years.</p> <p>The IPA will hold virtual public hearings for the draft 2024 Long-Term Plan on Friday, September 15, 2023. Public comments on the draft 2024 Long-Term Plan are due on Friday, September 29, 2023.</p> <p>The August 15 announcement outlined some of the major proposed changes to each Program. A redline version of the proposed edits can be found <a href="#">here</a>. The main Consumer Protection-related proposed updates can be found in Sections 7-9 and include the following:</p> <ul style="list-style-type: none"> <li>• Implementing Designee annual renewal requirements by late 2023 (p. 430 - redline)</li> <li>• Empowering the Program Administrator to apply formal discipline of an entity to affiliate companies that share at least 25% ownership or have at least 50% common managers or staff (p. 435 – redline)</li> <li>• Developing an economic incentive (in the form of a Renewable Energy Credit adder) for Stranded Customer Projects (when a customer has already signed a contract with a solar company and then the company goes out of business or is prevented from moving forward with the project for reasons such as disciplinary action) (p. 440 - redline)</li> <li>• Implementing an escrow process for Approved Vendors that do not pass</li> </ul>

	<p>through promised incentive payments (p. 443 - redline)</p> <ul style="list-style-type: none"> <li>• Adding flexibility to “unbatch” projects after ICC approval of REC contracts to assist harmed customers (p. 446 – redline)</li> <li>• New requirements for community solar providers who require customers to sign an agency agreement giving authority to the provider to take over management of the customer’s utility account (p. 453 – redline)</li> <li>• Developing of a solar restitution fund to assist customers who have been harmed through participating in Illinois Shines or Illinois Solar for All (p. 475 – redline)</li> </ul> <p>The Program Administrators and IPA note the above proposed amendments to the Long-Term Plan to encourage stakeholders to provide written feedback by the September 29, 2023, deadline.</p>
<p><b>ISSUES/ QUESTIONS TO DISCUSS</b></p>	<ul style="list-style-type: none"> <li>• <i>What questions do meeting participants have on the process that led to the draft 2024 Long-Term Plan?</i></li> <li>• <i>What questions do meeting participants have about the written feedback process and deadlines and the process leading up to finalization of the 2024 Long-Term Plan?</i></li> </ul>
<p><b>MEETING MINUTES</b></p>	<p>Helpful links regarding providing feedback for the Draft 2024 Long-Term Renewable Resources Procurement Plan:</p> <ul style="list-style-type: none"> <li>• <a href="#">Cover Letter and Hearing Notice</a></li> <li>• <a href="#">Draft 2024 Long-Term Plan</a></li> <li>• <a href="#">Appendices</a></li> </ul> <p>Meeting participants did not share many questions about the Long-Term Plan feedback process. One participant asked when the market can expect to see the updated Consumer Protection Handbook that is referenced in the draft 2024 Long-Term Plan and whether the IPA would solicit feedback on the Handbook. The IPA responded with an explanation of the process for the current public comment period (ending September 29, 2023) and timeline for ICC approval of the 2024 Long-Term Plan by October 20, 2023.</p> <p>A redline of the Consumer Protection Handbook will be appended to the Long-Term Plan draft filed with the ICC. After the ICC Order in February 2024, the Agency will update the Consumer Protection Handbook and publish a final version consistent with the ICC Order. The Agency will provide 45-day period before any new requirements will go into effect.</p>

<p><b>TOPIC 2</b></p>	<p><b>Market use of e-signature systems and software to obtain customer signatures</b></p>
<p><b>BACKGROUND</b></p>	<p>Section 5(A) of the Program Guidebook discusses the ability for Approved Vendors and Designees to use e-signature systems to obtain customer signatures for Disclosure Forms. The Guidebook states that, “Approved Vendors and Designees may employ commercially available third-party e-signature systems for</p>

	<p>customer signature of the Disclosure Form but must submit the audit/signature information page with the e-signed Disclosure Form.” Further, the Guidebook states that, “[t]he Disclosure Form should be completed after system design (for DG systems) and must be delivered to the customer and signed by the customer before the customer signs that project’s installation contract or subscription agreement, in the case of community solar.” Finally, the Guidebook requires that an Approved Vendor or Designee “review the Disclosure Form with the customer and provide the customer with an opportunity to ask questions about the Disclosure Form prior to obtaining a signature from the customer. The customer must sign the Disclosure Form prior to signing the installation agreement or subscription agreement.”</p> <p>The Program Administrators are interested in learning how Approved Vendors and Designees are operating to ensure compliance with the above requirements regarding Disclosure Forms.</p>
<p><b>ISSUES/ QUESTIONS TO DISCUSS</b></p>	<ul style="list-style-type: none"> <li>• <i>What practices are Approved Vendors and Designees using to ensure customers are signing Disclosure Forms before signing installation contracts or subscription agreements?</i></li> <li>• <i>To what extent do Approved Vendors or Designees provide Disclosure Forms and installation contracts/subscription agreements to customers at the same time? If so, how do they ensure the customer signs and returns the Disclosure Form <u>before</u> (or at the same time as) signing and returning the installation contract/subscription agreement?</i></li> <li>• <i>For Approved Vendors and Designees using a third-party e-signature platform, are customers and sales representatives e-signing separately via their own email addresses, or are there alternative ways representatives are obtaining customer signatures?</i></li> <li>• <i>What feedback are today’s meeting attendees hearing from consumers about reviewing and asking questions about Disclosure Forms before being asked to sign the Form?</i></li> </ul>
<p><b>MEETING MINUTES</b></p>	<p>Stakeholder feedback included:</p> <ul style="list-style-type: none"> <li>• One participant said it sends customers the Disclosure Form and contract/agreement for signature at the same time and asks customers to sign and return the Disclosure Form first.</li> <li>• One community solar participant stated it sends the customer’s Disclosure Form and subscription agreement for signature at the same time using the bundle feature on DocuSign.</li> <li>• One participant said it locks all customer documents until it receives the signed Disclosure Form.</li> <li>• Several participants agreed that the new Disclosure Forms present useful information for customers; however, some distributed generation participants recommended the Program Administrator and Agency consider how Disclosure Forms could be more useful to customers.</li> </ul>