



# **Program Guide for Solar Electric Allies**

**Developed by Energy Trust of Oregon**

## **Part 6: Solar Within Reach**

## 6.1 **Solar Within Reach**

In an effort to expand opportunities in renewables for lower- and moderate-income households and as part of Energy Trust's Diversity, Equity and Inclusion (DEI) goals, Energy Trust has implemented a program for moderate-income homeowners to gain better access to rooftop solar, called *Solar Within Reach* (SWR). The intent is to provide higher incentives to income-qualified customers pursuing rooftop solar. This offering can be ideal for customers who own homes in good condition, but for whom an investment in solar is financially just out of reach. This incentive offering was developed with the expert input from more than a dozen community-based organizations, local governments, and others.

### Effective Date for Process and Form Changes

Effective October 29, 2019 participating Solar Electric Trade Allies can apply for Solar Within Reach funding at a higher-than-standard incentive rate, using the same standard program procedures for application submission, review, installation, and verification. New required forms to enable Solar Within Reach participation include:

- Solar Within Reach Contractor Participation Agreement (Form 200SWR) – signed by the Trade Ally and kept on file with the Energy Trust Solar Program
- Solar Within Reach Income Verification (Form 210SWR) – signed by the customer at the time of incentive application submission and kept with the project record

### 6.1.1 **Diversity, Equity and Inclusion**

Energy Trust believes it has a responsibility to ensure that all customers can directly benefit from its services, including people with low and moderate incomes, communities of color, and rural communities. Solar Within Reach is part of a larger strategy to improve and enhance offerings for underserved customers across the state.

For more information, and to view Energy Trust's *Diversity, Equity and Inclusion (DEI) Operations Plan*, please visit our [website](#).

### 6.1.2 **Overview**

Solar Within Reach has three key features:

- Higher incentives to offset a greater portion of the upfront cost of a project;
- A special pool of the highest-performing solar trade allies who receive training and agree to higher service standards; and at times,

- Targeted marketing campaigns and collaboration with community-based organizations.

Like Energy Trust's other solar incentive offerings, Solar Within Reach incentives are subject to funding availability and may change at any time. The incentive rates are posted on the Energy Trust website and the Solar Status Report.

## **6.2 Eligibility**

### **6.2.1 Trade Ally Eligibility**

Only approved solar trade allies are eligible to offer Solar Within Reach incentives to qualifying customers. In order to participate, trade allies must be active and in good standing with the program, as well as meet the requirements below.

- 5-star trade ally rating (Trade Ally must maintain a rating of 5-stars to remain eligible to submit Solar Within Reach applications)
- Sign and return the Solar Within Reach Contractor Participation Agreement (Form 200SWR).
- Complete a Solar Within Reach training (or receive equivalent approval from the Solar Program)
- No disciplinary action or suspensions from the program within the previous year.
- No unresolved customer complaints.

Final participation approval rests solely with Energy Trust.

### **6.2.2 Customer Eligibility**

Only income-qualified customers are eligible to receive Solar Within Reach incentives. Prior to performing any Solar Within Reach work or assessments, the trade ally must confirm income eligibility of the customer using Energy Trust's Form 210SWR: Solar Verification of Income Qualification. The Income Verification Form includes an income chart for the current year. A chart of qualifying incomes can also be found on the Solar Within Reach web page. Qualifying income levels are defined by Oregon statutes and are updated annually.

In addition to meeting income qualifications, the customer must own their home to qualify for Solar Within Reach incentives. The home can be a single-family home, manufactured home, floating home, or multifamily residence that is either an attached side-by-side unit or a duplex, triplex or fourplex.

### 6.2.3 Expectations

Offering Requirements:

- 1) Trade allies must agree to provide at least a 7-year full system workmanship warranty;
- 2) Confirm income eligibility of customers, and;
- 3) Meet or exceed the customer service standards and other requirements outlined in the Participation Agreement (Form 200SWR).

Customer Service Standards

- 1) Trade allies must agree to focus solar recommendations on what is most cost-effective for the customer;
- 2) Show courtesy, honesty, integrity, objectivity, and fairness when interacting with customers and Energy Trust staff;
- 3) Must not apply undue sales pressure or high-pressure sales techniques, and;
- 4) If marketing door-to-door, must train individuals going door-to-door in local, state, and federal laws governing solicitation and obtain a local permit for solicitations, if required by the city or county.

In general, the Solar Program expects high standards from trade allies participating in the Solar Within Reach offering. The increased incentive funding has been intentionally allocated from Energy Trust's budget in support of our organizational Diversity, Equity, and Inclusion (DEI) goals, and is specifically targeted at increasing Solar's affordability for populations that have not previously had access to it. It is important for participating trade allies to understand and model these goals.

## 6.3 *Solar Within Reach Process and Required Documentation*

All Solar Within Reach projects are expected to adhere to Energy Trust's [Solar Electric Installation Requirements](#), and a detailed list of required design documentation can be found there.

To apply for incentives, follow the standard incentive application instructions outlined in **Section 5**, and check the box for Solar Within Reach. This will enable the correct incentive rate and forms. Before an incentive can be reserved, a signed copy of the income verification form (Form 210SWR) must be submitted to Energy Trust by the customer as a part of the standard application process in PowerClerk.

The Trade Ally must itemize the Solar Within Reach incentive on the customer's invoice and provide it as an upfront discount on the customer's invoice. Energy Trust reserves the right to change incentives at any time.