

# SOLSMART APPLICATION:

## Regional Organization Pathway



The Regional Organization Designation Pathway is designed for regional organizations - such as regional councils, planning organizations, and development organizations - that work with groups of local governments, disseminate resources, and strengthen regional collaboration. There are three levels of SolSmart designation for regional organizations – below are the requirements for each:

### BRONZE:

- Complete five prerequisite actions:
  - Solar Statement (PR-1)
  - Planning and Zoning Guidance (PR-2)
  - Inspection Checklist (PR-3)
  - Permitting and SolSmart Training (PR-4)
  - Community Engagement (PR-5)
- Earn a total of 50 points from actions across the five Special Focus Categories: Planning, Solar Rights; Utility Engagement; Community Engagement; and Market Development & Finance.

### SILVER:

- Fulfill SolSmart Bronze prerequisites.
- Complete the Planning prerequisite (PR-6).
- Earn 80 points overall from actions taken in the Special Focus Categories.

### GOLD:

- Fulfill SolSmart Silver prerequisites.
- Complete the Designation prerequisite (PR-7).
- Earn 110 points overall from actions taken in the Special Focus Categories.

### Regional organization Data

Regional organization applying:

State:

Regional organization Website:

Region/Communities Served:

Other solar awards/recognition earned:

kW of installed solar in region:

### Contact Information

Regional organization contact:

Contact title:

Department:

Contact email:

Contact phone:

- I am authorized to apply for and seek recognition for my organization.
- I understand that data submitted through this application will be shared online.

# SOLAR STATEMENT (PR-1)

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## PR-1: Solar Statement – Required for all levels of designation

The Solar Statement should address the items listed in the bullets below. The Statement should be signed by an individual who can speak on behalf of the organization. The Statement may be provided on organizational letterhead in pdf format or as a weblink. Please find a Solar Statement template that you can download at: [www.solsmart.org/media/SolSmart\\_Solar\\_Statement\\_Template\\_Regional-Organizations.docx](http://www.solsmart.org/media/SolSmart_Solar_Statement_Template_Regional-Organizations.docx)

*Regional organizations interested in pursuing SolSmart designation must indicate their commitment to supporting solar development in their community.*

*These letters should include:*

- *A commitment to participate in the SolSmart designation process.*
- *A statement of solar goals, areas of focus or organization priorities.*
- *Past achievements or programs related to solar PV and/or renewable energy, if any.*
- *Commitment to tracking metrics related to solar PV and/or provide benchmark of available solar metrics (i.e. number of installed systems or growth in residential installations).*
- *A commitment of staff time and resources to improve the regional environment for solar PV.*

*These letters do not need to be more than a page in length. SolSmart encourages you to use the [Solar Statement template](#).*

**Documentation:** *(Please share a link to a public webpage where your Solar Statement is displayed or attach it as a document.)*

# ADDITIONAL PREREQUISITES

- To earn SolSmart Bronze designation – complete **PR-2, PR-3, PR-4, and PR-5.**
- To earn SolSmart Silver designation – complete all Bronze prerequisites and **PR-6.**
- To earn SolSmart Gold designation – complete all Bronze and Silver prerequisites and **PR-7.**

Action	Points	We've done this!	Documentation										
<p><b>Planning and Zoning Guidance</b></p> <p>PR-2: Provide guidance on solar PV planning, zoning and development best practices to communities and counties in the entire region through webinars, in-person meetings, one-on-one calls or trainings.</p>	Req'd for Bronze	<input type="checkbox"/>	Share link:										
<p><b>Inspection Checklist</b></p> <p>PR-3: Collaborate with local inspection departments to develop an inspection checklist for the region, and share results region-wide through webinars, in-person meetings, training and/or the regional website. Encourage communities to integrate the checklist into their inspection processes.</p>	Req'd for Bronze	<input type="checkbox"/>	Share link:										
<p><b>Permitting &amp; SolSmart Training</b></p> <p>PR-4: Host regional training or discussion on best practices in solar permitting for communities and counties and introduce the SolSmart program and process.</p>	Req'd for Bronze	<input type="checkbox"/>	Share link:										
<p><b>Community Engagement</b></p> <p>PR-5: Post a solar landing page on the regional website with information on the region's solar goals and local resources for solar development, including the inspection checklist developed in PR-3.</p>	Req'd for Bronze	<input type="checkbox"/>	Share link:										
<p><b>Planning</b></p> <p>PR-6: Include quantifiable metrics and/or specific actions for solar PV development in the most current version of relevant region-wide plans (e.g. energy plan, comprehensive plan, economic development plan).</p>	Req'd for Silver	<input type="checkbox"/>	Share link:										
<p><b>Designation</b></p> <p>PR- 7: Meet the following thresholds based on number of localities in your region SolSmart designated:</p> <table border="1"> <thead> <tr> <th>Localities in the regional organization</th> <th>Number of SolSmart designees</th> </tr> </thead> <tbody> <tr> <td>Up to 10</td> <td>40% of localities (1-4)</td> </tr> <tr> <td>11-25</td> <td>35% of localities (4-9)</td> </tr> <tr> <td>26-50</td> <td>30% of localities (8-15)</td> </tr> <tr> <td>51+</td> <td>25% of localities (13+)</td> </tr> </tbody> </table>	Localities in the regional organization	Number of SolSmart designees	Up to 10	40% of localities (1-4)	11-25	35% of localities (4-9)	26-50	30% of localities (8-15)	51+	25% of localities (13+)	Req'd for Gold	<input type="checkbox"/>	Share link:
Localities in the regional organization	Number of SolSmart designees												
Up to 10	40% of localities (1-4)												
11-25	35% of localities (4-9)												
26-50	30% of localities (8-15)												
51+	25% of localities (13+)												

## SPECIAL FOCUS CATEGORIES

- To earn SolSmart Bronze designation – **achieve 50 points** (and complete required prerequisites).
- To earn SolSmart Silver designation – **achieve 80 points** (and complete required prerequisites).
- To earn SolSmart Gold designation – **achieve 110 points** (and complete required prerequisites).

### Special Focus: Planning

Action	Points	We've done this!	Documentation
PZD-1a: Review existing region-wide planning documents and identify new opportunities (not already included) to integrate solar PV into planning goals. Compile findings in a memo.	5	<input type="checkbox"/>	Share link:
PZD-1b: Draft proposed language and a timeline for the inclusion of solar PV in existing and/or future plans. Involve regional planners in the creation of draft language.	5	<input type="checkbox"/>	Share link:
PZD-2: Provide guidance, technical assistance or incentives for solar PV development on parking lots, vacant lots, buffer lands around uses with nuisances (e.g. refineries, wastewater plants), brownfields, airport safety zones (with FAA approval), and non-building structures.	20	<input type="checkbox"/>	Share link:
<b>Total Points:</b> Add up the total number of points you believe you have achieved in this category.			


### Special Focus: Solar Rights

Action	Points	We've done this!	Documentation
SR-1: Post an online summary of state policies related to a property owner's solar access and solar rights, including links to state-level policy.	5	<input type="checkbox"/>	Share link:
SR-2: Post consumer protection resources on solar PV online.	5	<input type="checkbox"/>	Share link:
SR-3: Offer recommended procedure for recording solar easements for property owners and post publicly.	10	<input type="checkbox"/>	Share link:
<b>Total Points:</b> Add up the total number of points you believe you have achieved in this category.			


### Special Focus: Utility Engagement

Action	Points	We've done this!	Documentation
U-1: Discuss community or shared solar PV programs with the local utilities. Compile summary and next steps into a memo.	5	<input type="checkbox"/>	Share link:
U-2: Discuss regional goals for solar PV, net metering, and/or interconnection processes with the local utility and explore areas for future collaboration. Compile summary and next steps in a memo.	10	<input type="checkbox"/>	Share link:
U-3: Coordinate with member communities or other local governments to engage utilities	5	<input type="checkbox"/>	Share link:
U-4: Encourage low-to-moderate income (LMI) participation in utility-provided community solar program through program design and/or financing support options.	10	<input type="checkbox"/>	Share link:
<b>Total Points:</b> Add up the total number of points you believe you have achieved in this category.			

## Special Focus: Community Engagement

Action	Points	We've done this!	Documentation
CE-1: Convene an active energy task force or solar working group of member government representatives that meet at least three times per year.	10	<input type="checkbox"/>	Share link:
CE-2: Provide technical assistance and/or programs or processes to support solar PV development on non-profit and/or community-service orientated facilities.	10	<input type="checkbox"/>	Share link:
CE-3a: Support or host a community-wide group purchase program (e.g., Solarize). Program must have occurred within the last 5 years.	20	<input type="checkbox"/>	Share link:
 <b>Earn additional points:</b> CE-3b: Encourage low-to-moderate income (LMI) participation in community-wide group purchase program through program design and/or financing support options.	10	<input type="checkbox"/>	Share link:
CE-4a: Host a solar workshop open to the general public explaining solar PV opportunities and policies. Workshop must have occurred within the last 5 years.	5	<input type="checkbox"/>	Share link:
CE-4b: Distribute educational materials at relevant community events and through local government channels.	5	<input type="checkbox"/>	Share link:
CE-4c: Establish partnerships with local non-profits or organizations within your region on solar PV with multi-year goals and/or planned initiatives.	5	<input type="checkbox"/>	Share link:
CE-4d: Demonstrate local government support for local solar projects through speeches, press releases, blog posts, opinion articles, etc.	5	<input type="checkbox"/>	Share link:
CE-4e: Engage the region through reoccurring public meetings, focus groups, or other similar events around climate, energy, or sustainability plans.	5	<input type="checkbox"/>	Share link:
CE-5: Distribute solar job training and career opportunities for solar in coordination with local community colleges and/or workforce organizations.	20	<input type="checkbox"/>	Share link:
CE-6: Conduct feasibility analysis for solar PV on brownfields and/or other under-utilized properties.	10	<input type="checkbox"/>	Share link:
CE-7: Demonstrate activity in state-level conversations regarding solar PV.	20	<input type="checkbox"/>	Share link:
CE-8: Post an online solar map for your region.	10	<input type="checkbox"/>	Share link:
<b>Total Points:</b> Add up the total number of points you believe you have achieved in this category.			

## Special Focus: Market Development and Finance

Action	Points	We've done this!	Documentation
MDF-1: Provide online resources on active solar installers and/or local incentives for solar PV.	5	<input type="checkbox"/>	Share link:
MDF-2: Make solar PV metrics publicly available.	5	<input type="checkbox"/>	Share link:
MDF-3: Provide information to consumers and/or member communities about residential and commercial solar PV financing option.	5	<input type="checkbox"/>	Share link:
MDF-4a: Provide local incentives (e.g. permit fee waivers or rebates) or locally-enabled finance (e.g., a revolving loan fund) for solar PV.	20	<input type="checkbox"/>	Share link:
 <b>Earn additional points:</b> MDF-4b: Provide local incentives for solar PV to low-to-moderate income (LMI) households, Disadvantaged Business Enterprises (DBEs), and/or non-profit organizations that provide community services.	5	<input type="checkbox"/>	Share link:
MDF-5: Engage local banks, credit unions, foundations and/or community funds about lending for solar PV projects through in-person meetings, discussions, and/or workshops. Compile summary and next steps in a memo.	20	<input type="checkbox"/>	Share link:
MDF-6: Demonstrate that the region's installed per capita capacity is above top 20% of states (>99 watts/person).	20	<input type="checkbox"/>	Share link:
MDF-7: Procure solar energy or install solar PV for direct use by the regional organization or a regional organization-run program or service.	20	<input type="checkbox"/>	Share link:
<b>Total Points:</b> Add up the total number of points you believe you have achieved in this category.			

# INNOVATIVE ACTIONS

The actions identified in the categories above represent many of the most common and impactful efforts regional organizations are taking to reduce soft costs and make going solar easier and more affordable in their regions. However, we recognize that organizations are taking innovative approaches to reduce soft costs. If your organization has taken actions to reduce soft costs not above, please share it with us in the table below. Innovative actions will be reviewed by a team of solar experts and each action may be worth up to 20 points.

Category	Action(s)	Documentation
Planning		Share link:
Solar Rights		Share link:
Utility Engagement		Share link:
Community Engagement		Share link:
Market Development and Finance		Share link:



# DESIGNATION CHECKLIST

	Points	Step Completed
<b>SOLAR STATEMENT</b>		
PR-1: Solar Statement	Required for Bronze	<input type="checkbox"/> <i>(not autopopulated)</i>
<b>ADDITIONAL PREREQUISITES</b>		
PR-2: Planning and Zoning Guidance	Required for Bronze	<input type="checkbox"/>
PR-3: Inspection Checklist	Required for Bronze	<input type="checkbox"/>
PR-4: Permitting & SolSmart Training	Required for Bronze	<input type="checkbox"/>
PR-5: Community Engagement	Required for Bronze	<input type="checkbox"/>
PR-6: Planning	Required for Silver	<input type="checkbox"/>
PR-7: Designation	Required for Gold	<input type="checkbox"/>
<b>SPECIAL FOCUS CATEGORY POINTS</b>		
Planning	Points:	
Solar Rights	Points:	
Utility Engagement	Points:	
Community Engagement	Points:	
Market Development and Finance	Points:	
<b>Total Points</b>		
Need 50 for Bronze, 80 for Silver, and 110 for Gold.		