

## Verification Documents for SolSmart Regional Planning Organizations

Each action includes recommended forms of documentation an applicant can submit for our team to verify the action has been achieved. While submitting the recommended documentation is preferable and will help expedite the review process, if your planning council does not have the requested material, please provide what best demonstrates achievement of each action.

- SolSmart Bronze, regional organizations must complete PR-1 through PR-5 and achieve 50 points.
- SolSmart Silver, regional organizations must complete PR-1 through PR-6 and achieve 80 points.
- SolSmart Gold, regional organizations must complete PR-1 through PR-7 and achieve 110 points.

## Prerequisites


Action	Recommend Verification Documentation
<p><b>Solar Statement</b>  <b>PR-1: Regional organizations interested in pursuing SolSmart designation must indicate their commitment to supporting solar development in their community. These letters should include:</b></p> <ul style="list-style-type: none"> <li>• A commitment to participate in the SolSmart program, and to encourage member communities to pursue designation</li> <li>• A statement of solar goals, areas of focus or organizational priorities</li> <li>• Past achievements or programs related to solar and/or renewable energy</li> <li>• A commitment of staff time and resources to improve local environment for solar</li> <li>• A <a href="#">sample solar statement is available here</a></li> </ul>	<ul style="list-style-type: none"> <li>• Provide link to public commitment letter on the organization's website.</li> </ul>
<p><b>Planning and Zoning Guidance</b>  <b>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.</b></p>	<ul style="list-style-type: none"> <li>• Provide link to or upload materials developed for meetings, trainings, or calls.</li> </ul>
<p><b>Inspection Checklist</b>  <b>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.</b></p>	<ul style="list-style-type: none"> <li>• Provide link to or upload inspection checklist.</li> </ul> <p>AND</p> <ul style="list-style-type: none"> <li>• Provide agenda for meetings or evidence that the resource has been shared with communities in the region</li> </ul>
<p><b>Permitting Training</b>  <b>PR-4: Host regional training or discussion on best practices in solar permitting for communities and counties and introduce the SolSmart program and process.</b></p>	<ul style="list-style-type: none"> <li>• Provide materials from the permitting training</li> </ul> <p>AND</p> <ul style="list-style-type: none"> <li>• Provide agenda from the permitting training</li> </ul>

<p><b>Community Engagement</b>  <b>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.</b></p>	<ul style="list-style-type: none"> <li>• Provide link to solar landing page</li> </ul>										
<p><b>Silver Planning Prerequisite</b>  <b>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).</b></p>	<ul style="list-style-type: none"> <li>• Provide link to or upload relevant plan(s) and note relevant page numbers.</li> </ul>										
<p><b>Gold Planning Prerequisite</b>  <b>PR 7: Meet the following thresholds based on number of potential SolSmart designees in your region.</b></p> <table border="1" data-bbox="147 541 795 716"> <thead> <tr> <th>Localities in the regional organization</th> <th>Number SolSmart designated</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>16+ designations</td> </tr> </tbody> </table>	Localities in the regional organization	Number SolSmart designated	Up to 10	40% of localities (1-4)	11-25	35% of localities (4-9)	26-50	30% of localities (8-15)	51+	16+ designations	<ul style="list-style-type: none"> <li>• Potential designees are municipalities and counties that are members of a regional organization and have the jurisdiction required to achieve SolSmart designation</li> <li>• Upload a complete list of communities in the organization’s region and note which communities are potential SolSmart designees and which have achieved designation under the SolSmart program.</li> </ul>
Localities in the regional organization	Number SolSmart designated										
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# SPECIAL FOCUS CATEGORIES

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## Special Focus: Planning, Zoning, and Development

Action	Recommended Verification 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.	<ul style="list-style-type: none"><li>• Upload or provide link to memo from planning official or staff.</li></ul>
 <b>Earn additional points:</b> 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.	<ul style="list-style-type: none"><li>• Upload or provide a link to the agenda from the meeting or provide presentation materials for the session.</li></ul>
PZD-2: Provide guidance, technical assistance, or incentives for solar PV development on parking lots, vacant lots, buffer lands around nuisances (e.g. refineries, wastewater plants), brownfields, airport safety zones (with FAA approval), and non-building structures.	<ul style="list-style-type: none"><li>• Upload or provide link to relevant guidance documents developed.</li></ul> <p>OR</p> <ul style="list-style-type: none"><li>• Provide memo regarding regional organization's relevant technical assistance services.</li></ul>





# Special Focus: Solar Rights


Action	Recommended Verification 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.	<ul style="list-style-type: none"><li>• Provide link to webpage with resource(s).</li></ul>
SR-2: Provide consumer protection resources on solar which help consumers make informed solar PV purchasing decisions.	<ul style="list-style-type: none"><li>• Upload or provide link to webpage containing consumer protection resources or copies of locally-developed document(s).</li></ul>
SR-3: Offer recommended procedure for recording solar easements for property owners and post publicly.	<ul style="list-style-type: none"><li>• Upload or provide link to resources.</li></ul>

# Special Focus: Utility Engagement

Action	Recommended Verification Documentation
<p>U-1: Discuss community or shared solar PV programs with the local utilities. Compile summary and next steps into a memo.</p>	<ul style="list-style-type: none"> <li>• Upload or provide link to meeting minutes (including a list of follow-up action items), e-mail correspondence, meeting agenda, or other evidence meeting took place.</li> </ul> <p>AND</p> <ul style="list-style-type: none"> <li>• Upload or provide link to the memo.</li> </ul>
<p>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.</p>	<ul style="list-style-type: none"> <li>• Upload or provide link to meeting minutes (including a list of follow-up action items), e-mail correspondence, meeting agenda, or other evidence meeting took place.</li> </ul> <p>AND</p> <ul style="list-style-type: none"> <li>• Upload or provide link to the memo.</li> </ul>
<p>U-3: Coordinate with member communities or other local governments to engage utilities.</p>	<ul style="list-style-type: none"> <li>• Submit an indication of active participation by member communities with utilities, such as meeting attendance or correspondence.</li> </ul>
<p>U-4: Encourage low-to-moderate income (LMI) participation in utility-provided community solar program through program design and/or financing support options.</p>	<ul style="list-style-type: none"> <li>• Provide a link to website that publicly explains the forms of financing support available for low-to-moderate income individuals and families.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Provide evidence of an outreach campaign to inform these people of the available support (emails, posters, fliers, and other communication channels can qualify).</li> </ul>

# Special Focus: Community Engagement

Action	Recommended Verification Documentation
<p>CE-1: Convene an active energy task force or solar working group of member government representatives that meet at least three times per year.</p>	<ul style="list-style-type: none"> <li>• Upload or provide link to meeting minutes (including a list of follow-up action items), meeting agenda, or materials prepared for the meeting (e.g., handouts and slides) of the organization's energy task force/working group from the past year and provide documentation of the frequency of these meetings.</li> </ul>
<p>CE-2: Provide technical assistance and/or programs or processes to support solar PV development on non-profit and/or community-service orientated facilities.</p>	<ul style="list-style-type: none"> <li>• Upload or provide link to evidence of technical assistance (e.g., emails, meeting minutes).</li> </ul>
<p>CE-3a: Support or host a community-wide group purchase program (e.g., Solarize). Program must have occurred within the last 5 years</p>	<ul style="list-style-type: none"> <li>• Upload or provide link to a website where the Solarize campaign has been publicly announced that demonstrates the RPO's involvement or support.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Upload or provide link to outreach documents from the regional planning organization regarding a Solarize campaign in the region.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Provide memo detailing Solarize campaign(s) hosted by the regional planning organization.</li> </ul>
<p> <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</p>	<ul style="list-style-type: none"> <li>• Provide a link to website that publicly explains the forms of financing support available for low-to-moderate income individuals and families or provide evidence of an outreach materials detailing options for LMI participants in a group purchase program.</li> </ul>
<p>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.</p>	<ul style="list-style-type: none"> <li>• Upload or provide links to documentation of agenda of workshop, date and invited population.</li> </ul>
<p> <b>Earn additional points:</b> CE-4b: Distribute educational materials at relevant community events and through local government channels.</p>	<ul style="list-style-type: none"> <li>• For each 5-point action, upload or provide links to documentation of dates and agendas for the workshops, meetings, or community events and the population that was invited.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• For other types of community engagement not listed, provide memos or emails that document what parts of the community were engaged, what topics they were engaged on, when it happened, and what form the engagement took.</li> </ul>
<p> <b>Earn additional points:</b> CE-4c: Establish partnerships with local non-profits or organizations within your region on solar PV with multi-year goals and/or planned initiatives.</p>	<ul style="list-style-type: none"> <li>• See 4(b).</li> </ul>
<p> <b>Earn additional points:</b> CE-4d: Demonstrate local government support for local solar projects through speeches, press releases, blog posts, opinion articles, etc.</p>	<ul style="list-style-type: none"> <li>• See 4(b).</li> </ul>

 **Earn additional points:** CE-4e: Engage the region through reoccurring public meetings, focus groups, or other similar events around climate, energy, or sustainability plans.

CE-5: Distribute solar job training and career opportunities for solar in coordination with local community colleges and/or workforce organizations.

CE-6: Conduct feasibility analysis for solar PV on brownfields and/or other under-utilized properties.

CE-7: Demonstrate activity in state-level conversations regarding solar PV.

CE-8: Post an online solar map for your region.

- See 4(b).


- Upload or provide links to posted job descriptions, screenshots from employment websites, scans or photos of classified ads, or evidence of advertisement of job trainings.

- Upload or provide link to a copy of the feasibility analysis or study performed by an independent consultant or professional engineer.

- Upload or provide link to copies of public comments on solar energy or related energy proceedings, op-eds in local newspapers, or records of meetings attended by representatives of the regional council.

- Provide link to the online resource.

# Special Focus: Market Development and Finance

Action	Recommended Verification Documentation
MDF-1: Provide online resources on active solar installers and/or local incentives for solar PV.	<ul style="list-style-type: none"> <li>• Upload or provide link to document or webpage that contains a brief description of local installers and links to their website.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Upload or provide link to document or webpage that contains a brief description of local solar incentives and financing mechanisms with links to relevant forms.</li> </ul>
MDF-2: Make solar PV metrics publicly available.	<ul style="list-style-type: none"> <li>• Provide link to webpage displaying solar metrics.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Upload public-facing document containing regularly updated solar metrics.</li> </ul>
MDF-3: Provide information to consumers and/or member communities about residential and commercial solar PV financing options.	<ul style="list-style-type: none"> <li>• Provide link to webpage containing a brief description of local financing mechanisms with links to relevant forms and/or external websites providing education and resources on these topics.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Upload public-facing document describing local financing mechanisms.</li> </ul>
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.	<ul style="list-style-type: none"> <li>• Upload or provide link to a local ordinance creating local incentives or financing mechanisms.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Upload or provide link to applications or required forms for a system to be eligible for incentives or financing.</li> </ul>
<p> <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.</p>	<ul style="list-style-type: none"> <li>• Provide a link to website that publicly explains the local incentives available for relevant parties.</li> </ul>
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.	<ul style="list-style-type: none"> <li>• Upload or provide link to an agenda (including time, date, and attendees), meeting minutes (including a list of follow-up action items), and any materials prepared for the meeting (including handouts or slide presentations).</li> </ul> <p>AND</p> <ul style="list-style-type: none"> <li>• Upload or provide a link to the memo.</li> </ul>
MDF-6: Demonstrate that the region's installed per capita capacity is above top 20% of states (>99 watts/person).	<ul style="list-style-type: none"> <li>• Upload or provide link to written documentation from building department or local solar installers confirming your community's installed solar capacity.</li> </ul>
MDF-7: Procure solar energy or install solar PV for direct use by the regional organization or a regional organization-run program or service.	<ul style="list-style-type: none"> <li>• Upload or provide link to document installation or procurement.</li> </ul>

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