

## Verification Documents for SolSmart Modified Designation Pathway Criteria



Each action includes recommended forms of documentation an applicant can submit for our team to verify an action has been achieved. While submitting the recommended documentation is preferable and will help expedite the review process, if your county does not have the requested material, please provide what best demonstrates achievement of each action. For SolSmart Bronze, counties must complete four prerequisites, and achieve 40 points. For SolSmart Silver, counties an additional Silver prerequisite, and achieve 80 points. For SolSmart Gold, counties must achieve all Silver criteria and 150 points.

## Prerequisites


| Action   | Recommend Verification Documentation  |
|--|---|
| <p><b>Solar Statement</b><br/> <b>PR-1: Counties 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 county 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 commitment to tracking metrics related to solar PV and/or provide a benchmark of available solar metrics (e.g. residential solar installation growth, number of installed systems)</li> </ul> | <ul style="list-style-type: none"> <li>• Provide link to public commitment letter signed by an elected official.</li> </ul> <p><b>AND</b></p> <ul style="list-style-type: none"> <li>• Upload or provide a link to documentation of a system for metrics collection.</li> </ul> |
| <p><b>Planning and Zoning Guidance</b><br/> <b>PR-2: Provide guidance on planning, zoning and development best practices to communities in the county through webinars, in-person meetings, one-on-one calls or trainings.</b></p>   | <ul style="list-style-type: none"> <li>• Provide link or upload materials developed for meetings.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Provide agenda or evidence of meetings.</li> </ul>  |
| <p><b>Inspection Checklist</b><br/> <b>PR-3: Collaborate with local inspection departments to develop an inspection checklist for the region, and share results publically through webinars, in-person meetings, training and/or the county's website. Encourage communities to integrate the checklist into their inspection processes.</b></p>   | <ul style="list-style-type: none"> <li>• Provide inspection checklist</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Provide agenda for meetings held throughout county</li> </ul>   |
| <p><b>Permitting Training</b><br/> <b>PR-4: Host regional training or discussion on best practices in permitting for communities in the county.</b></p>  | <ul style="list-style-type: none"> <li>• Provide materials from the training</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Provide agenda from the training</li> </ul>  |
| <p><b>Silver Planning Prerequisite</b><br/> <b>PR 5: Incorporate solar into county-wide comprehensive plans and/or economic development plans, including quantifiable targets or metrics.</b></p>  | <ul style="list-style-type: none"> <li>• Provide relevant plan(s)</li> </ul>  |

# SPECIAL FOCUS CATEGORIES


## Special Focus: Solar Rights

| Action   | Recommended Verification Documentation  |
|--|---|
| <p>SR-1: Conduct review of state policies related to protecting rights of property owners to install solar and solar system owners' right to sunlight on their property. Make this information available to residents.</p>                     | <ul style="list-style-type: none"> <li>• Provide link to webpage with resource(s).</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Upload copies of documents that have been distributed to residents.</li> </ul>   |
| <p>SR-2: Provide consumer protection resources on solar which help consumers make informed solar PV purchasing decisions.</p>  | <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>  |
| <p>SR-3: Develop local process to enable solar rights through a solar access ordinance.</p>  | <ul style="list-style-type: none"> <li>• Upload or provide link to relevant portions of local zoning code.</li> </ul>   |
| <p>SR-4: Offer procedure for recording solar energy easements for property owners.</p>   | <ul style="list-style-type: none"> <li>• Upload or provide link to relevant portions of local zoning code.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Upload e-mails or correspondence between relevant local government staff which would indicate procedures for solar easements exist or that easements have been recorded in the past.</li> </ul>  |
| <p>SR-5a: Engage homeowners and neighborhood associations and discourage unnecessarily restrictive requirements for solar PV through meetings with leadership.</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, materials prepared for the meeting (e.g., handouts and slides), and/or other evidence meeting took place.</li> <li>• If guidance documents were developed for homeowner's associations, please upload a copy of the documents.</li> </ul> |
| <p> <b>Earn additional points:</b> SR-5b: Encourage subdivisions to consider shared solar allowances.</p>   | <ul style="list-style-type: none"> <li>• Same as above.</li> </ul>  |
| <p> <b>Earn additional points:</b> SR-5c: Work with homeowners associations to develop appropriate guideline documents for solar PV.</p>                    | <ul style="list-style-type: none"> <li>• Same as above.</li> </ul>  |
| <p>SR-6: Local Innovation: Please describe your local innovation regarding Solar Rights. Be sure to explain how this helps reduce soft cost of solar in your community. Innovation Actions may receive up to 20 points toward designation.</p> | <ul style="list-style-type: none"> <li>• Upload or provide link to document supporting innovation action.</li> </ul>  |

# Special Focus: Utility Engagement

| Action  | Recommended Verification Documentation   |
|---|--|
| <p>U-1: Review best practices for integrating interconnection with electrical inspections and share best practices with staff.</p>  | <ul style="list-style-type: none"> <li>• Upload or provide link to memo, e-mail, presentation and/or other document(s) used to share best practices with inspection and permitting staff.</li> </ul>   |
| <p>U-2: Discuss community or shared solar programs with the local utility.</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> <li>• If any informational materials were developed for the meeting, please upload a copy of the documents.</li> </ul>  |
| <p>U-3a: Engage and communicate with the utility on community goals for solar PV, net metering, and interconnection processes.</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, materials prepared for the meeting (e.g., handouts and slides), or other evidence at least one meeting occurred with your local utility regarding these topics.</li> </ul>   |
| <p> <b>Earn additional points:</b> U-3b: Coordinate with regional organizations or other local governments to engage utilities.</p>                                | <ul style="list-style-type: none"> <li>• If working with a regional organization or group of local governments, submit an indication of your community's active participation in regional efforts, such as meeting attendance or contribution to coalition's work.</li> </ul>  |
| <p>U-4: Coordinate utility and city inspections for solar PV, reducing the total number of inspections needed.</p>  | <ul style="list-style-type: none"> <li>• Upload or provide link to an overview of the local government's inspection process, including contact points with the utility interconnection process.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Upload or provide link to an e-mail, letter, or other written documentation from local utility indicating ongoing coordination.</li> </ul>   |
| <p>U-5: Launch and support a utility-provided community solar program.</p>  | <ul style="list-style-type: none"> <li>• Upload or provide link to include outreach materials developed by the community to support the program, evidence of local events hosted at municipal facilities, an agenda from meetings with utility partners and/or an e-mail or letter from the local utility highlighting coordination on the solar program.</li> </ul> <p><b>AND</b></p> <ul style="list-style-type: none"> <li>• Upload or provide link to press release or other public announcement of the launch of a utility-provided community solar program.</li> </ul> |
| <p>U-6: Local Innovation: Please describe your local innovation regarding Utility Engagement. Be sure to explain how this helps reduce soft cost of solar in your community. Innovation Actions may receive up to 20 points toward designation.</p> | <ul style="list-style-type: none"> <li>• Upload or provide link to document supporting innovation action.</li> </ul>   |

# Special Focus: Community Engagement

| Action   | Recommended Verification Documentation  |
|--|---|
| CE-1: Convene an active energy task force or solar working group that meets at least three times per year.   | <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 community’s energy task force/working group from within the past year and provide documentation of the regularly scheduled frequency of these meetings.</li> </ul>  |
| CE-2: Create a solar landing page on local government’s website with information on the community’s solar goals and local resources for solar development.   | <ul style="list-style-type: none"> <li>• Provide a link to the solar landing page.</li> </ul>   |
| CE-3: Encourage solar PV on non-profit or community facilities through fee waivers, technical assistance, or other support.  | <ul style="list-style-type: none"> <li>• Upload or provide link to website that publicly explains the forms of support available to non-profits and community facilities.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Upload or provide link to evidence of a mailing or email that was sent to such groups to inform them of these forms of support.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Upload or provide link to a letter or email from a non-profit or community facility that states that it has received such support from the municipality.</li> </ul> |
| CE-4a: Support or host a community-group purchase program (e.g., Solarize).  | <ul style="list-style-type: none"> <li>• Upload or provide link to a website where the Solarize campaign has been publicly announced.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Upload or provide link to a brief memo about the status of an ongoing Solarize campaign.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Upload or provide link to documentation of the completion of a Solarize campaign.</li> </ul>   |
|  <b>Earn additional points:</b> CE-4b: Design program or create financing support options to encourage low-to-moderate income participation in community solar initiatives. | <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 campaign to inform these people of the available support (emails, posters, fliers, and other communication channels can qualify).</li> </ul>  |
| CE-5a: Host a solar workshop open to the general public and/or local government staff explaining PV opportunities and policies.  | <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>   |
| CE-5b: Create and distribute educational materials at relevant community events and through local government channels.   | <ul style="list-style-type: none"> <li>• See 5(a).</li> </ul>   |
| CE-5c: Establish partnerships with local non-profits or organizations on solar with multi-year goal or planned initiatives.  | <ul style="list-style-type: none"> <li>• See 5(a).</li> </ul>   |

|   |  |
|---|--|
| <p>CE-5d: Publicly encourage community solar projects or solar PV projects on community facilities.</p>   | <ul style="list-style-type: none"> <li>• See 5(a).</li> </ul>  |
| <p>CE-5e: Engage the community in robust, ongoing discussion around climate, energy, or sustainability plans.</p>   | <ul style="list-style-type: none"> <li>• See 5(a).</li> </ul>  |
| <p>CE-6: Create and publish job training and placement opportunities for solar in coordination with local community colleges.</p>   | <ul style="list-style-type: none"> <li>• Upload or provide links to job descriptions that were posted, screenshots from employment websites, scans or photos of classified ads, or evidence of advertisement of job trainings.</li> </ul>  |
| <p>CE-7: Conduct feasibility analysis for solar PV on brownfields, landfills, formerly contaminated lands and/or other under-utilized properties.</p>   | <ul style="list-style-type: none"> <li>• Upload or provide link to a copy of the feasibility analysis or study performed by an independent consultant or professional engineer.</li> </ul>   |
| <p>CE-8: Install or lease land for solar PV development on brownfields, landfills, formerly contaminated lands and/or other under-utilized properties.</p>  | <ul style="list-style-type: none"> <li>• Upload or provide link to a copy of as-built construction documents, official commissioning report, or interconnection agreement associated with the solar energy system.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Upload or provide link to a brief summary of the installation(s), including total number of systems, size, location, and photos from facilities manager or staff. If the project has not yet been completed, provide evidence that a contract (power purchase agreement, lease, EPC) has been signed or a contractor has been selected. This evidence could include a notice to proceed for the solar developer, a press release, public announcement, or news source announcing that the solar development will happen.</li> </ul> |
| <p>CE-9: Engage with regional organizations on advancing solar policies in the region including, but not limited to, unified permitting processes and group procurement opportunities.</p>  | <ul style="list-style-type: none"> <li>• Upload or provide link to e-mails, memos, or other correspondence showing that a representative of the municipality has met with their regional planning commission or another regional organization on solar policy or that a representative of the municipality has attended a meetings hosted by the regional organization on solar energy.</li> </ul>   |
| <p>CE-10: Demonstrate activity in state-level conversations regarding solar PV.</p>   | <ul style="list-style-type: none"> <li>• 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 municipality.</li> </ul>   |
| <p>CE-11: Create and/or share an interactive solar map for your community.</p>  | <ul style="list-style-type: none"> <li>• Provide link to the online resource.</li> </ul>   |
| <p>CE-12: Local Innovation: Please describe your local innovation regarding Community Engagement. Be sure to explain how this helps reduce soft cost of solar in your community. Innovation Actions may receive up to 20 points toward designation.</p> | <ul style="list-style-type: none"> <li>• Upload or provide link to document supporting innovation action.</li> </ul>   |

# Special Focus: Market Development and Finance

| Action  | Recommended Verification Documentation  |
|---|---|
| MDF-1: Provide resources on active solar installers and/or local incentives for solar PV and/or thermal.  | <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 about different solar PV financing options, including commercial options, such as Property Assessed Clean Energy (PACE) financing.  | <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-4: Conduct feasibility analysis for solar PV installations on public facilities.  | <ul style="list-style-type: none"> <li>• Upload or provide link to a copy of the feasibility analysis or study performed by an independent consultant or professional engineer.</li> </ul>  |
| MDF-5: Install solar PV and/or thermal capacity on local facilities.  | <ul style="list-style-type: none"> <li>• Upload or provide link to a copy of as-built construction documents, official commissioning report, or interconnection agreement associated with the solar energy system.</li> </ul> <p>OR</p> <ul style="list-style-type: none"> <li>• Upload or provide link to a brief summary of the installation(s), including total number of systems, size, location, and photos from facilities manager or staff.</li> </ul> |
| MDF-6a: If applicable, provide PACE financing in your community.  | <ul style="list-style-type: none"> <li>• Upload or provide link to a local ordinance creating a PACE district.</li> </ul>   |
| MDF 6b: Demonstrate the PACE financing has been used to finance solar PV in your community.   | <ul style="list-style-type: none"> <li>• Upload or provide link to a reference project or description of PACE project portfolio.</li> </ul>   |
| MDF-7: Provide local incentives (i.e. permit fee waivers or rebates) or locally-enabled finance (e.g., a revolving loan fund) for solar.                                    | <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 forms that are required for a system to be eligible for incentives or financing.</li> </ul>   |
| MDF-8: Engage local banks, credit unions, foundations and/or community funds about lending for solar PV projects through in-person meetings, discussions, and/or workshops. | <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>  |
| MDF-9: Demonstrate that the community'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-10: Integrate solar PV with other distributed or emerging technologies such as storage, combined heat and power systems or electric vehicles in at least one installed or proposed project.

- Upload or provide link to a copy of as-built construction documents or official commissioning report of solar installed with another technology.

OR

- Upload or provide link to a brief summary of the installation(s), including total number of systems, size, location, and photos from facilities manager or staff.

MDF-11: Develop feasibility analysis or planning for resilient solar PV technologies for critical facilities and emergency planning such as solar and storage.

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

OR

- Upload or provide link to a summary (provided by facilities manager or staff) of the proposed project, highlighting storage integration and placement near critical facilities.

MDF-12: Local Innovation: Please describe your local innovation regarding Market Development and Finance. Be sure to explain how this helps reduce soft cost of solar in your community. Innovation Actions may receive up to 20 points toward designation.

- Upload or provide link to document supporting innovation action.

---

### Acknowledgment

This material is based upon work supported by the U.S. Department of Energy's Office of Energy Efficiency and Renewable Energy (EERE) under the Solar Energy Technologies Office Award Numbers DE-EE0007154 & DE-EE0007155.

### Full Legal Disclaimer

This report was prepared as an account of work sponsored by an agency of the United States Government. Neither the United States Government nor any agency thereof, nor any of their employees, makes any warranty, express or implied, or assumes any legal liability or responsibility for the accuracy, completeness, or usefulness of any information, apparatus, product, or process disclosed, or represents that its use would not infringe privately owned rights. Reference herein to any specific commercial product, process, or service by trade name, trademark, manufacturer, or otherwise does not necessarily constitute or imply its endorsement, recommendation, or favoring by the United States Government or any agency thereof. The views and opinions of authors expressed herein do not necessarily state or reflect those of the United States Government or any agency thereof.