



ILLINOIS ADJUSTABLE BLOCK PROGRAM
MARKETING GUIDELINES TRAINING WEBINAR
April 9, 2019

- Adjustable Block Program (ABP) Resources
- DG Final Marketing Guidelines
- Final Program Guidebook Updates
- Final Contract Requirements
- Next Steps
- SRECTrade Contact Information

Adjustable Block Program (ABP) Resources



- [Final Long-Term Renewable Resources Procurement Plan](#)
- [InClime, Inc. ABP Website](#)
- [InClime, Inc. Marketing Guidelines & Marketing Materials Webpage](#)
- [InClime, Inc. Final Contract Requirements Webpage](#)
- [InClime, Inc. Final Program Guidebook \(April 3, 2019\)](#)
- Distributed Generation (DG) Documents
 - [Final Guidelines for Marketing Material and Marketing Behavior](#)
 - [Project Application Attestation Form – SRECTrade](#)
 - [Final DG Brochure](#) & [Final DG Brochure \(Spanish\)](#)
- Community Solar (CS) Documents
 - [Final Community Solar Marketing Guidelines](#)
 - [Final CS Brochure](#) & [Final CS Brochure \(Spanish\)](#)

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- Statements Declared by Referrers
- Accurate Representation
- Contacting Clients
- Facility Design
- ABP Informational Brochure
- In-Person Solicitation
- Training of Representatives
- Identification of Salespeople
- Retention of Records
- Terms of Contract
- Facilities Submitted Prior to 11/26/2018
- Attestation Form

- No demonstrably false or misleading statements, such as:
 - “The ABP guarantees that you will save money”
 - “We represent the ABP”
 - “Your home will run on cleaner, greener energy”
 - “The sun will provide your electricity”
- Maintain consistency with language in Standard Disclosure Form and contract in regards to financial implications
 - Unless contract explicitly states that there will be a savings guarantee, the Referrer may not promise this to the client
 - Avoid referring to PV facilities as ‘free’ unless client will not pay anything for the facility or generated energy
- Refer statement questions to SRECTrade or InClima, Inc. for review

- No usage of any utility, consumer, or governmental programs' logos in representation of the Referrer
- The IPA logo may be used on materials that have been created by the IPA, including the ABP Informational Brochure and the Standard Disclosure Form
- All aspects of business must be performed without any unfair, deceptive, or abusive acts or practices (“UDAAP”)
- All claims must be based on factual, verifiable sources

- Referrers must comply with any and all federal, state, and local laws regarding restrictions on contacting clients. This includes:
 - Federal Do Not Call Registry
 - CAN-SPAM Act of 2003
 - Telemarketing Sales Rule
 - Telephone Consumer Protection Act of 1991
 - Telephone Solicitations Act
- Maintain accurate and current 'do-not-contact' lists
- Conduct business with openness and transparency with full effort to correct any misunderstanding by the client
- For cases involving a client or prospective client that is not fluent in English, please see Number 15 on Page 8 of the [Final Guidelines for Marketing Material and Marketing Behavior](#)

- Referrers' representatives must evaluate the site's azimuth, orientation, and shading before designing a facility
- Facility must be designed before the client signs a contract

- ABP Informational Brochure must be presented to client at the first contact, in-person or online
- If first contact is made by telephone or mail, ABP Informational Brochure must be presented at the first follow-up
- ABP Informational Brochure will be given to the client again prior to execution of contract
- Standard Disclosure Form is to be completed after facility design and delivered to client before the contract is signed
 - Representative will review and provide client with opportunity for questions before signing (electronic signature is permitted)
- Electronic delivery of both forms is permitted (not merely a hyperlink)

- In-person solicitations must be conducted between 9:00am-7:00pm unless pre-arranged
- Consent must be obtained to enter a multi-unit residential dwelling
 - Consent from one prospective client to enter a multi-unit dwelling does not constitute consent to market to other occupants
- Criminal background checks must be performed for any employees engaging in in-person solicitation
- SRECTrade must maintain a record confirming that a criminal background check has been performed on its Referrer's employees or agents

- All representatives must be knowledgeable of requirements applicable to marketing and sale of PV facilities
- All representatives must be familiar with the PV facilities they sell and their corresponding contracts and fees
- If a representative is unsure if information provided is misleading or inaccurate, they must submit to InClime, Inc. and have InClime, Inc.'s phone number available to provide for complaints
- Any account numbers must be deleted if contract is not signed

- A client's sales or lease contract or PPA must be retained for 15 year and 6 months after the energization of the facility
 - Or for 6 months longer than the duration of the lease or PPA (whichever is longer)

- Referrers' representatives that engage in in-person solicitation for PV facilities under 25 kW must display identification on outerwear and must include:
 - Full name
 - Agent ID number
 - Photograph of agent
 - Name and logo of company being represented
- If the identification includes additional information, it is subject to review by InClime, Inc.
- All referrers' representatives engaged in telephone solicitation for ABP facilities must also be assigned ID numbers and communicate these to prospective customers

- Terms of the underlying contract must be consistent with the terms in the Standard Disclosure Form
- Any statements made verbally must be consistent with the contract and Standard Disclosure Form
- Clients cannot be required to sign up for a specific Alternative Retail Electric Supplier (ARES) as part of solar contract

- See the [IPA's LTRRPP](#) Section 6.13.1. for details on how facilities submitted prior to November 26, 2018 will be approved
- Requirements, in short:
 - A signed contract amendment with full compliance according to Final Plan
 - The Standard Disclosure Form, signed by client post-contract execution
 - Proof that the ABP Informational Brochure was provided to the client

- If owner of facility can not be reached or refuses to sign a revised contract or Standard Disclosure Form, then InClime, Inc. may attempt to contact the client to confirm this claim
- IPA and InClime, Inc. reserve the right to exclude projects that, in their determination, represent deceptive marketing or business practices through complaints or other information brought to their attention

- InClima published updated Final Program Guidebook on April 3rd
- Notable updates:
 - Roof-mounted facilities now required to submit Plot Diagram/Site Map
 - Facilities required to use same production estimate calculation methodology for Part I and Part II applications
- Final Program Guidebook Redlines provided on IL ABP website

- All ABP sales contracts are required to comply with the applicable Final Contract Requirements (DG or CS)
- SRECTrade developed Contract Amendment Requirements Checklist for all facilities to complete and provide
 - Purchase Contract Requirements Checklist
 - Lease Contract Requirements Checklist
 - PPA Contract Requirements Checklist
- Distributed via email following webinar

- Distribute Webinar Attestation Form for signature
- Distribute Contract Amendment Requirements Checklist for facility applications
- Distribute SRECTrade logo for identification badges
- Confirm currently-employed salespeople
- Develop and communicate Site Map submission process
- Future SRECTrade webinar TBA to review:
 - SRECTrade online account features for both partners and clients
 - Contract payment process and timing



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Installers/Referrers:
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