

ACCESS Toolkit Quick Start Guide



Business & Technology Report

December 2023

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Prepared by NRECA Research in partnership with Solar Energy Technologies Office, U.S. Department of Energy under award number DE-EE0009010.

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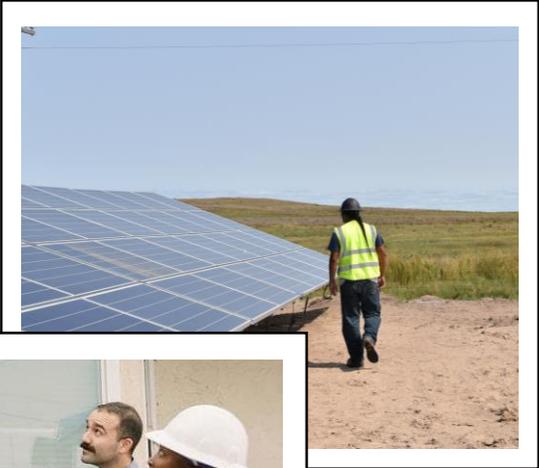
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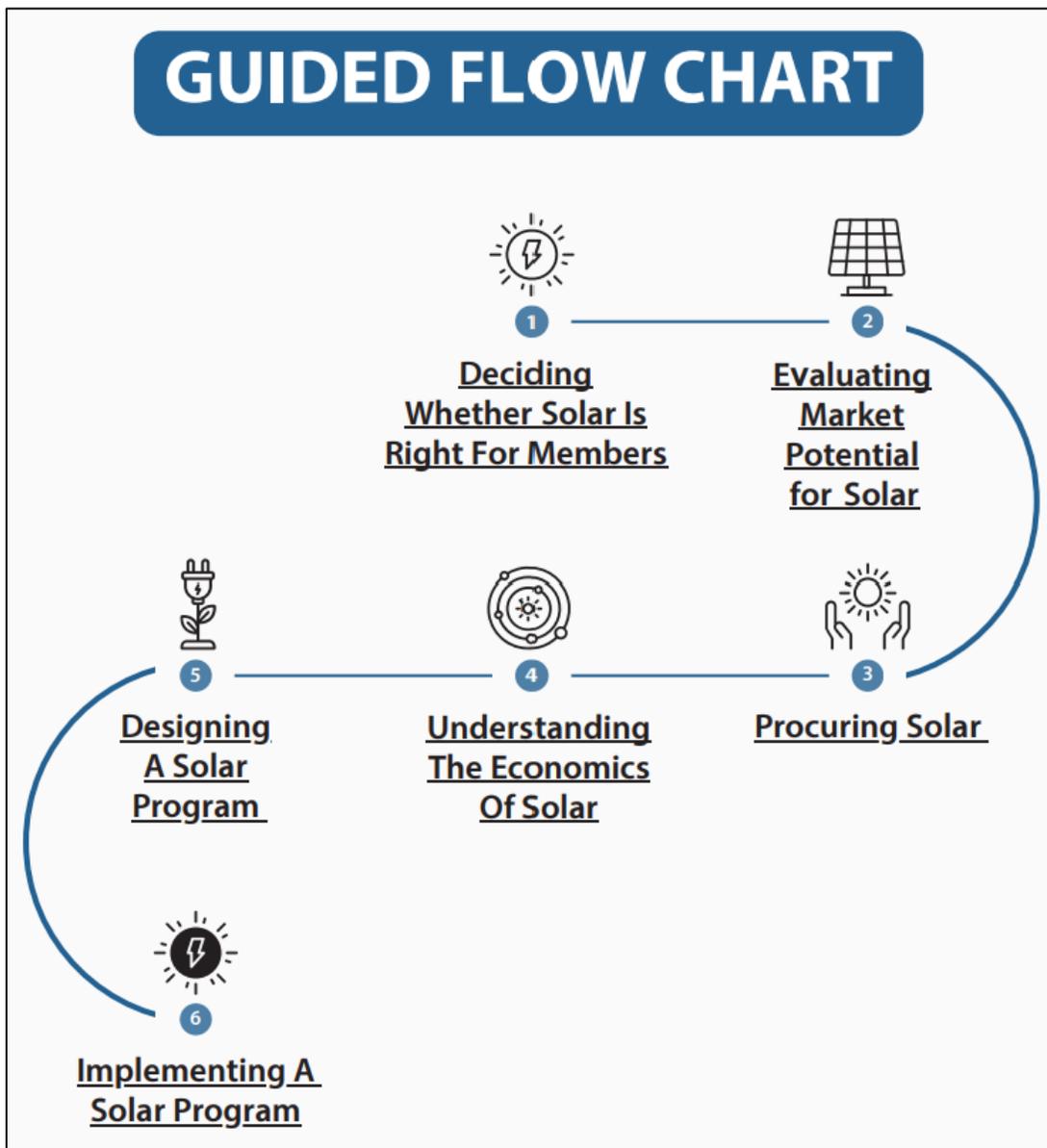
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Executive Summary

This guide can help rural electric cooperatives decide whether community solar energy is right for their service territory, design a plan appropriate for their members, and roll out that plan. The guide is organized by major steps in this process and highlights relevant tools and resources that have been developed for the NRECA's members through the Achieving Cooperative Community Equitable Solar Source (ACCESS). In addition to these tools, external resources are included for further consideration in each topic.



Step 1: Deciding Whether Solar is Right for Members

In considering solar energy, it is important to determine what value solar energy adds to cooperative members and to investigate which type of solar projects will meet that need best. Below is a collection of ACCESS tools that will help in the decision as to whether solar is right for rural electric cooperatives. Additional resources are included that will further help answer that question.

[ACCESS Project: PNNL Report on the Valuation of Solar Projects](#)

Distributed energy resources (DERs) including solar photovoltaics, battery storage systems, and similar technologies are unique assets to a grid that can provide flexibility to operators and benefits to utilities and their customers. Determining these various benefit streams is an important step in understanding the full range of possible DER solutions for cooperatives. This report, developed by the Pacific Northwest National Laboratory (PNNL) for ACCESS, provides clarity around what potential benefit streams DERs can have for cooperatives.

[ACCESS Project's Community Solar Business Case Tool](#)

Projecting the costs and benefits of community solar is an important first step to understanding whether community solar is an appropriate solution. In collaboration with Cliburn and Associates through the National Community Solar Partnership (NCSP), the ACCESS initiative developed this tool for evaluating the costs and benefits of community solar for Low- and Moderate-Income (LMI) members. The tool linked here uses Orcas Power and Light Cooperative (OPALCO) as a case study, but is generalizable.

[ACCESS: Research on Potential Additional Benefits from Solar PV and Energy Storage to the Distribution Grid](#)

Identifying the additional benefits that cooperatives gain from PV installations and battery storage can help make the case for a solar program. This PNNL report dives into how rural electric cooperatives can use solar PV smart inverters to maximize the additional benefits from distribution grid services.

Additional Resources

- [“Organizational Solar Readiness Assessment,”](#) HUD: A self-assessment to figure out whether solar is the right solution.
 - [“Getting Started: Solar for Multi-family Affordable,”](#) GRID Alternatives: A guide designed for multifamily affordable housing, but applicable to other solar projects in determining which questions to consider.
 - [“Solar Energy: SolSmart’s Toolkit for Local Governments,”](#) SolSmart: A roadmap to navigate the use of solar energy and the related technologies.
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- [“Renewable Energy Toolkit for Affordable Housing,” HUD](#): A step-by-step toolkit on how to integrate renewable energy into affordable housing projects.
- [Decision Support \(NREL\)](#): A site to help stakeholders, including rural communities, implement clean energy solutions.



Step 2: Evaluating the Market Potential for Solar

Once it is determined that solar energy is the right solution, cooperatives will need to understand their state’s policies and solar energy market so that they can design an appropriate program. Below is a gap analysis reviewing challenges that face LMI access to solar energy and an analysis of cooperative solar markets and trends. External resources have been identified in two areas: (1) estimating state market potential for solar and (2) understanding state policies and regulations on solar energy.

[ACCESS Project Gap Analysis](#)

Assessing the challenges for low- to moderate-income (LMI) members is an important step in understanding market potential for solar energy. This gap analysis report reviews challenges around LMI access to solar energy and looks at solutions and pathways for tackling those challenges.

[ACCESS Report: Electric Cooperative Solar Market Analysis and Trends](#)

This report provides on-the-ground observations around solar industry market trends from wholesale power providers. The report lends insight from across the rural electric cooperative industry on which solutions are working best, and which may be appropriate for a given market.

Additional Resources

- [“The 50 States Energy Report,”](#) NC Clean Energy Technology Center: Reports on policy and regulatory changes for clean energy in every state.
- [“The Community Power Scorecard,”](#) Institute for Local Self-Reliance: A guide on how each states’ policies help or hinder clean energy.
- [“Database of State Incentives for Renewables & Efficiency,”](#) DSIRE: A database of all state incentives for renewable energy and the associated technologies.
- [“Target Market Research & Segmentation,”](#) Solar Value Project: A resource for conducting market research for solar energy, specifically for community solar.
- [“Solar Energy Toolkit: Stakeholder Engagement,”](#) SolSmart: A guide for how to develop and implement a stakeholder engagement strategy when expanding solar energy.
- [“Solar Community Engagement Strategies for Planners,”](#) American Planning Association: A brief on how to have conversations with communities about solar, how to address some common misunderstandings about solar, and some pointers for designing engagement sessions.
- [“Community Outreach and Solar Equity: A Guide for States on Collaborating with Community-Based Organizations,”](#) Clean Energy States Alliance: A guide for how to strengthen relationships with community-based organizations for better community engagement.
- [“Clean Energy for Low Income Communities: Stakeholder Engagement,”](#) Better Buildings DOE: A guide for engaging stakeholders in low-income communities.

- [“More alike than different: Profiles of high-income and low-income rooftop solar adopters in the United States.”](#) Kimberly S. Wolske: A paper on what factors guide LMI household decisions for adopting solar as compared to higher-income households.



Step 3: Designing a Solar Program

There are many ways to design a solar program, and particular attention should be paid to members' needs. The ACCESS initiative has produced a report looking at the variety of programs that other rural electric cooperatives have used to meet their members' needs, particularly those of their LMI customers. Additional resources on the necessary steps to designing an effective solar program for various contexts have been included for further consideration. Permitting requirements can impact the design of a program and should also be considered during this stage.

[ACCESS Report: How Cooperatives Are Supporting Their Members in Need](#)

This report explores a variety of programs and services offered by cooperatives to help low- to moderate-income members. Not only does this report help provide examples of LMI programs, it also helps identify how these programs will benefit other members, the cooperative, and the overall distribution system.



SolSmart has put together [a toolkit](#) for understanding how permitting fits into solar PV construction. They have also developed [a guide](#) on simplifying the permitting process. Nationwide, momentum is gathering behind automating permitting for faster solar adoption. The National Renewable Energy Laboratory (NREL) has put together [a helpful article](#) that describes the software tool SolarAPP+ and what automated permitting might bring.

Additional Resources

- [“CELICA Toolkit: Clean Energy Solutions for Low Income Communities,”](#) Better Buildings DOE: A toolkit for developing low-income energy efficiency and renewable energy programs for low-income communities.
- [“Utility Community Solar Handbook: Understanding and Supporting Utility Program Development,”](#) Smart Electric Power Alliance: A handbook for utilities on community solar program development.
- [“Community Solar Project Planning Working Group Session #4: Program Designs and Subscription Models,”](#) NCSP: A presentation on different pricing and subscription models for community solar projects.
- [“Design and Implementation of Community Solar Programs for Low- and Moderate-Income Customers,”](#) NREL: A report on best practices for LMI community solar design.
- [“Equitable Access to Community Solar: Program Design and Subscription Considerations,”](#) NREL: A brief on the considerations for community solar programs around the country.
- [“Checklist for Voluntary Utility-led Community Solar Programs,”](#) IREC: A checklist to help utilities develop community solar programs.



Step 4: Understanding the Economics of Solar

When it comes to financing solar energy, there are many options. One of the objectives of the ACCESS initiative was to research successful financing mechanisms and program designs for cooperatives. This step includes tools that describe the existing approaches to financing community solar projects, explore the business case for community solar, help incorporate storage into models, and provide review of government funding options for solar. Additional external resources are included to help utilities further explore financing options.

[ACCESS Report: How Existing Co-op Program and Financing Mechanisms Support Solar Access for LMI Members](#)

This report evaluates which program and financing structures may best facilitate access to solar energy for LMI members. This report will help cooperatives discern how to finance solar for their members by exploring examples from existing cooperative programs.

[ACCESS: Community Solar Business Case Tool](#)

If considering community solar as a solution, cooperatives can use this business case tool to explore financial outcomes. This tool provides a flexible financial model that projects the costs and benefits to the system developer and subscriber of a single community solar project.

[ACCESS Project: Performance Testing for Battery Energy Storage Systems](#)

If considering battery storage as part of an energy solution, cooperatives will find this report helpful for improving accuracy of financial projections. The report contains a methodology for assessing and characterizing battery performance specifications for inclusion in financial models.

[ACCESS: Research on Using Low Income Home Energy Assistance Program \(LIHEAP\) Funds to Achieve Solar Affordability for Co-op Communities in Need](#)

Many solar programs and projects require outside funding. The federal government offers multiple sources of funding that cooperatives can use to expand solar benefits for their members. This brief contains information on how to use LIHEAP funds to promote solar energy projects in rural electric cooperative service territories.

Inflation Reduction Act

Many regard the Bipartisan Infrastructure Law (BIL) as the single largest U.S. energy investment in history. The Inflation Reduction Act (IRA) complements BIL grant funds by offering federal tax credits to businesses, nonprofits, institutions, and state, local, and tribal organizations for energy projects. Under the IRA, the Investment Tax Credit (ITC) yields a percentage reduction (usually 30%) in the cost of solar and solar-plus-storage systems. This percentage reduction can be increased through ITC Bonus Credits for a maximum of 70% reduction to the project cost.

The U.S. Environmental Protection Agency provides [a summary](#) of the specific IRA provisions that relate to solar and solar-plus-storage.

Clean Energy Group has written an overview entitled “[How to Make the Most of the Investment Tax Credit](#),” which includes how to apply for the newly released ITC Bonus Credits.

Additional Resources

- [NREL System Advisor Model \(SAM\)](#): A free software model that allows users to perform financial analysis for renewable energy systems.
- “[Financing Community-scale Solar](#),” RMI: A report on how to use existing solar financing models for community-scale solar projects
- “[Solar Energy Toolkit: Market Development and Finance](#),” SolSmart: A resource that provides an overview of the various ownership options for solar, the mechanisms available to increase the financing opportunities for solar, and how to use financing tools to promote solar in LMI households specifically.
- “[Fact Sheet for Community Solar PPA Model](#),” A fact sheet on power purchase agreement models for community solar projects, how they work and how to facilitate them.
- [NREL SLOPE Tool](#): An online platform to help state and local entities compare scenarios for the future of energy, costs, and emissions as well as explore the available city, county, and state data on renewables.
- “[Unlocking Solar for Low- and Moderate-Income Residents: A Matrix of Financing Options by Resident, Provider, and Housing Type](#),” NREL: A report on the most promising strategies for financing solar for LMI customers.

Step 5: Procuring Solar

The procurement of solar systems is usually done via requests for proposal (RFPs). RFPs provide a competitive way for cooperatives to solicit a variety of solutions. RFPs also offer cooperatives the opportunity to define important specifications for their solar projects, such as workforce development requirements, or other community benefit requests. This compilation of resources on best practices for writing an effective request for proposal (RFP) includes templates that cooperatives can use to start the process.

Additional Resources

- [“Procurement for Services & Solar Resources,”](#) Solar Value Project: An overview and guide to solar procurement and the associated services.
- [“RFP Template for Grid-Tied Solar Photovoltaic Systems for State, City, and Other Entities,”](#) NREL: An RFP template for local governments looking to develop solar.
- [Library of Community Solar RFPs:](#) A collection of RFPs compiled by the Community Solar Value Project from utility-driven solar procurements from around the country.
- [“HUD Solar Request for Proposals \(RFP\) Toolkit,”](#) HUD: A toolkit made for multi-family housing providers, but applicable to other entities on how to procure on-site solar.
- [American Cities Climate Challenge Renewables Accelerator Tools & Resources:](#) A database of resources on how to procure solar energy for different types of entities.
- [“Model RFP for Third-Party Solar,”](#) Clean Energy Resource Team: A template and guide on how to procure thirdparty financing for solar.
- [“Deciding on a Financing Approach and Beginning PV Procurement,”](#) NREL: An overview and guide for financing and procuring solar energy.
- [“Requests for Proposals: RFP Template and Best Practices,”](#) NREL: An overview of best practices for putting together requests for proposals and best practices for doing so.
- [“Procurement Guidance for Storage and Solar-Plus,”](#) A framework for procuring solar + storage
- [“Writing Solar Requests for Proposals \(RFPs\): Lessons from NREL’s University PV Implementation Assistance Program,”](#) NREL: A brief on the lessons learned by NREL from procuring solar for a number of U.S. universities.

Step 6: Implementing a Solar Program

Implementing a solar program may require the coordination of several community actors. The ACCESS initiative developed case studies describing the successful implementation of LMI community solar programs at rural electric cooperatives. Additional resources are included that describe strategies for marketing programs and working with community organizations to best reach LMI communities, in particular. Maintaining and updating programs is crucial for a sustainable and effective program; See the callout box on the next page for a recommendation of how to collect useful feedback from members.

[Anza Electric Cooperative](#)

This case study provides an example of how one cooperative, Anza Electric, is working to provide solar affordability benefits to a local Tribal community.

[Oklahoma Electric Cooperative](#)

This case study provides an example of how cooperatives can leverage existing programs and community partnerships to provide solar affordability benefits to LMI communities in their service areas.

[Orcas Power & Light Cooperative](#)

This case study delves into how Orcas Power & Light Cooperative used a suite of partnerships and an innovative hybrid battery energy storage system to provide solar benefits to their archipelago community.

[Roanoke Electric Cooperative](#)

This case study shows how Roanoke Electric leveraged its long-standing and successful Sustainable Forestry and Land Retention project to introduce energy efficiency, weatherization, and ultimately community solar to its members.

[Kit Carson Electric Cooperative](#)

This case study describes how Kit Carson Electric Cooperative is improving resiliency and providing energy independence for Native American Pueblos and surrounding communities through solar expansion.

[Community Outreach and Marketing Guidance for LMI Community Solar Programs](#)

LMI communities have unique needs when it comes to outreach and marketing of new or expanding energy programs. This resource suggests approaches that co-ops can use to maximize subscriptions for community solar programs offered to LMI communities.

Working Group and Listening Sessions

Program maintenance can be just as important as initial design. One way that cooperatives can gather the feedback necessary to improve and update their solar energy program is through a dedicated working group of customers and/or local community-based organizations that would be able to lend community perspective. This working group would meet every quarter to provide input and feedback on how the program is going. These meetings could follow [a listening session format](#) similar to that used by California’s Solar on Multifamily Affordable Housing (SOMAH) program. In-person sessions are ideal, yet virtual sessions can still yield very good results. Sessions should last about one hour and the agenda should include a program overview, member information sharing, question-and-answer, and facilitated discussion. Cooperatives are encouraged to spend the majority of the session listening closely to feedback from attendees while paying particular attention to any actionable items that are identified. In addition to being valuable for soliciting detailed feedback, this meeting format can also further strengthen the cooperative-community relationship.

Additional Resources

- “[Community Solar Marketing Plan Template](#),” Clean Power Marketing Group: A guide for how to design and carry out a community solar marketing campaign.
- “[Target Market Research & Segmentation](#),” Solar Value Project: A checklist, step-by-step guide, and webinar for how to use market research for customer acquisition.
- “[Up to the Challenge: Communities Deploy Solar In Underserved Markets](#),” NREL: A report on how community solar was implemented in 10 different contexts, leveraging community partners.



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