



# City of Dallas



## City of Dallas Low Income Solar Assistance Program Study

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## NATIONAL COMMUNITY SOLAR PARTNERSHIP



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U.S. DEPARTMENT OF  
**ENERGY**

# 01 Background and Goals

The Dallas Comprehensive Environmental and Climate Action Plan (CECAP) completed in 2020 has established goals to achieve 100% renewable energy for all City facilities and to increase renewable energy utilization citywide. The CECAP implementation strategies and actions highlight a focus on equity. In line with these goals, the City of Dallas seeks ways to support solar energy strategies for low and median income (LMI) households in Dallas so that the communities that have the most to gain from the benefits of renewable energy have pathways to access it.

The preliminary goals outlined for potential low income solar assistance program are:

- Cost savings opportunities for LMI households, particularly for households in multi-family buildings.
- Leverage benefits of solar for LMI households, particularly for households in multi-family buildings.
- Increase renewable energy consumed in City (and decrease fossil fuel energy consumption)
- Where possible, leverage / support Green Job training potential, particularly benefiting LMI residents.
- Solar developments supported by a program can include distributed solar (arrays built on the building sites they serve) as well as centralized/community solar (arrays that serve LMI residents through subscriptions)

## Why Develop Programs for LMI Solar?

Renewable energy, particularly solar photovoltaics (PV) provides a significant opportunity to address some of the greatest challenges faced by lower-income communities: the high cost of housing, energy poverty, pollution, and under/unemployment. In addition, achieving long-term renewable energy adoption and greenhouse gas reduction goals commonly featured in community climate action plans will require renewable energy transition for low income households not just for wealthier communities.

The need for solar among low income households is high. Solar can help provide financial relief to families struggling with high energy costs while helping to support the creation of local living-wage employment opportunities in an industry. Solar can provide long-term financial relief to families struggling with high and unpredictable energy costs, living-wage employment opportunities in an industry that has increased job counts by 167% since 2010 (<https://www.thesolarfoundation.org/national/>). Solar also represents an opportunity for clean, local energy sited in communities that have been disproportionately affected by the impacts of traditional power generation such as low air quality.

The opportunity for solar among low income households is significant. There are over 250,000 LMI households in the City of Dallas. The greenhouse gas emissions share of this portion of all Dallas households is estimated to be over 1.5 million metric tons annually. Targeted solar policies and programs can help open up access to solar for these households on a large scale having meaningful impact on citywide ghg emissions reductions as well as providing benefit for these households.

Reasons to develop a low-income solar program include:

Equitable Access. Energy efficiency and solar programs and advancements are funded by all ratepayers/taxpayers, including low-income households. Ensuring equitable access reflects that reality.

- **Participation.** Low-income solar programs offer an opportunity ensure all communities have the opportunity to participating early in the national transition to clean energy.
- **Economic Benefit.** Because low-income families spend a disproportionate amount of their income on utility bills, they receive a proportionally greater economic benefit from solar power – making investments in this community an even higher return on investment.
- **Environmental Justice.** Low-income communities and neighborhoods tend to be the most affected by pollution and climate change impacts.
- **Job Creation.** A low-income solar program can provide access to employment opportunities.
- **Widespread Adoption.** As noted, the magnitude of the LMI community as a share of the total residential sector is significant and advancing solar for that community can have a significant impact on taking the local solar market beyond the “early adopter” phase as a viable energy solution for all communities.

## Example LMI Solar Programs

There are a number of solar assistance programs aimed at advancing the benefits of solar energy for LMI communities. Example programs include efforts by municipalities, States, non-profit entities, and utilities. Reviewing examples from each of these types of groups is helpful in identifying the range of potential—even though each of these types of groups may have different capacities, funding streams, and perhaps even motivations.

### Municipal Examples

#### City of Houston - Sunnyside Landfill Solar Farm

The City of Houston competitively bid the opportunity to develop a solar installation on their Sunnyside Landfill. In the final proposal, the City retains ownership of property and liability of the subsurface landfill material. The tenant (solar developer) will complete permitting for and restoration of the landfill cover, be responsible for maintaining the restored cover within the leased space, including all landscaping, mowing, reseeding, etc. The project will develop a 50 MW utility solar array which will produce enough electricity to power 5,000 homes annually (power sold to electric utility) as well as a community owned 2MW solar array which will produce enough electricity to power 200 homes and which will provide power discounts for low-income residents in the neighborhood. The project is expected to include opportunities to train and employ local labor.

<https://www.houstontx.gov/mayor/press/sunnyside-solar-farm.html>

#### City of San Antonio—SolarHost

In 2015, San Antonio's municipally owned utility, CPS Energy, launched a pilot program called SolarHost in San Antonio, TX. SolarHost provides participating homeowners with a 3-cents per kilowatt/hour utility bill credit for hosting a solar PV project on their rooftop for 20 years. The solar installations are designed not to hinder the property and if any roof repairs are required, CPS pays the cost for removal and reinstallation. SolarHost has been a success, reaching its goal of 5 MW installed by February 2017. To date, 8,000 applications were received with over 600 systems installed across San Antonio. Without income or credit score requirements, SolarHost can be categorized as an Inclusive Solar Finance product by increasing access to solar for low income and/or low credit score customers by establishing a long-term arrangement that creates economic value derived from the installation of solar PV.

<https://www.solarhostsa.com/>

#### City of Denver—CARE

The Housing Authority of the City and County of Denver's (DHA's) Clean Affordable Renewable Energy (CARE) project provides solar benefits to affordable housing properties in the Denver Metro area through a 2 MW ground-mounted shared solar array. DHA manages the project and apportions the credits for the electricity produced by the array across several multifamily affordable housing facilities as well as and individual LMI households. The project is reported to generate a 15-20% electricity bill savings for the 500-plus households participating. DHA partnered with GRID Alternatives to develop and provide work force training and job opportunities. The project provided over 50 Denver residents from under-served communities with hands-on solar job training.

[https://www.usgbc.org/sites/default/files/2020-02/DHA%20Case%20Study%20October2019\\_1.pdf](https://www.usgbc.org/sites/default/files/2020-02/DHA%20Case%20Study%20October2019_1.pdf)

### Tribal Government Examples

#### LLBO Energy Assistance Program

The Energy Assistance Program (EAP) helps pay home heating costs. Households with the lowest incomes and highest energy costs receive the greatest benefit. Under this program, rather than energy assistance dollars flowing to community action agencies to be re-distributed to utilities on behalf of low-income families, the community action agency generates its own electricity on behalf of its low-income clients. The community solar array sells power to tribal government buildings and utilities and uses the revenue generated to fund energy payments for low-income community members. Monetary savings from community owned solar arrays are then integrated into the local energy assistance program which is then distributed through the Energy Assistance Program recipients. Recipients are not directly subscribed to the Community Solar project but instead are enrolled through local energy assistance program, with participating varying annually based on the following criteria:



**Tribal Government Examples****LLBO Energy Assistance Program** (continued)

- Size of grant is based on household size, income, fuel type and energy usage
- Households with the lowest income and highest fuel costs receive the highest grants
- Federally funded through US Department of Human Services
- Funds are available for renters or homeowners
- We provide direct payment to the energy supplier
- Educate consumers to use home heating energy efficiently and safely
- Advocate with energy suppliers and human service providers on behalf of consumers
- Crisis help for utility disconnections or necessary fuel deliveries
- Emergency heating system repair or replacement

The installation provides a unique capacity-building occasion to support training and renewable employment opportunities for Leech Lake Band members. Select construction trades trainees obtain their Registered Unlicensed Electrician license and receive hands-on training in solar installations, positioning them for a growing number of clean energy job opportunities across the state and beyond.

<https://www.llojibwe.org/tribalassistance/energyassist.html>

**State Examples****State of Connecticut**

The Green Bank's Incentive for LMI Homeowners. Customers who earn less than 100 percent of Area Median Income (AMI) are eligible for the LMI incentive. Because the Green Bank did not want the homeowners to be responsible for large upfront payments and wanted to ensure that the LMI homeowners would benefit from the federal solar tax credit, at least indirectly, only third-party-owned systems are eligible for the LMI incentive. The Green Bank's incentive is paid to the solar company, which owns the system and is then able to offer a reduced price to the customer.

To qualify for the LMI RSIP, contractors must submit their proposed product pricing, marketing strategy, and qualifications, and agree to abide by program rules.<sup>84</sup> These additional program requirements ensure that Green Bank-supported solar projects for LMI homeowners have a positive economic benefit for the homeowners and include strong consumer protection. For instance, price escalators, which increase the price customers pay over time, are not permitted with the LMI program. After completing the paperwork, contractors go through a negotiation and discussion process with the Green Bank before they are approved.

<https://ctgreenbank.com/>

**State of Colorado**

The Colorado Energy Office (CEO) has implemented two cost-effective low-income solar energy offerings as part of an effort to comprehensively address household energy burden - community solar (as a demonstration project) and rooftop solar. Both demonstrate the feasibility of combining energy efficiency and solar offerings to help reduce utility bills for residents most in need - those paying more than four percent of household income on energy costs.

**Community Solar:**

In 2015, the Colorado Energy Office (CEO) launched a low-income community solar demonstration project. The purpose of the project is to demonstrate the feasibility of building 100 percent low-income community solar models and to reduce household energy burden. GRID Alternatives was awarded a \$1.2 million grant from CEO to implement the project. In this capacity, GRID is responsible for securing utility partners, developing program terms, building each project, and leveraging CEO dollars with a 2:1 partner match. Multiple utility partners have been engaged and six community solar models have been built. All utility providers have agreed to offer solar credits to low-income subscribers to ensure that the solar energy provided is affordable. Subscribers are connected to each system for a set period of time and must reapply at the end of the contract term. Targeted subscribers are eligible for weatherization.

## Example LMI Solar Programs

### State Examples

#### State of Colorado

Community Solar (continued):

Community solar projects in this program offset either a pre-determined KW cap, or up to 100% of a subscriber's usage, resulting in a cost savings of approximately 50%. Subscribers were solicited through traditional outreach and marketing methods. These methods included flyers, brochures, direct calls, and in-person workshops. Households that had previously received weatherization services were targeted for outreach to ensure those subscribed maximized energy cost savings.

<https://energyoffice.colorado.gov/community-solar-0>

Colorado Rooftop Solar

The CEO Weatherization Assistance Program (WAP) offers rooftop solar photovoltaics (rooftop PV) to its clients on a limited basis. Colorado is the first state in the nation to receive approval from the U.S. Department of Energy (DOE) to integrate rooftop PV into WAP. The CEO WAP includes rooftop PV as a measure to specifically target expensive residential electricity expenditures. WAP anticipates being able to save each of its rooftop PV clients more than \$400 annually by reducing electricity costs. Rooftop PV will be installed on a limited number of homes that meet certain criteria to ensure they will provide a high return on investment.

<https://energyoffice.colorado.gov/rooftop-solar-pv>

### Utility Examples

#### Minnesota Power Low Income Community Solar

The Low Income Solar Pilot Program provides funding for projects that make it possible for income-qualified customers to have easier access to solar power. Applications for projects that benefit income-qualified customers or facilities that serve income-qualified customers can be submitted by customers, solar installers developers, or community groups looking to increase access to solar. To be considered for funding, projects must meet the following program criteria:

- **Energy Conservation.** Projects should reflect Minnesota Power's commitment to energy conservation by including an element of conservation education and/or demonstration. Low income projects should be additive to existing programs, but not redundant to them.
- **Accessibility and Empowerment.** Projects should empower customers to take control of their energy investments through education, training or hands-on experience. Projects should expand the opportunity for low income participation in solar programs.
- **Consumer Protection and Affordability.** Projects should demonstrate that the benefits outweigh the costs and provide full transparency of all project details including but not limited to detailed costs, benefits and financial arrangements.
- **Sustainability and Flexibility.** Projects should be flexible to accommodate changes as conditions and circumstances evolve and help support a viable solar market for low income customers.
- **Community engagement.** Projects should engage the community through increased awareness of available tools, resources and programs and provide an avenue for customers to participate in energy solutions.
- **Innovation.** Projects should include innovation through unique partnerships, structures or funding mechanisms.
- **Accountability.** Projects should describe their level of permanency and accountability including how the project benefits will or will not be passed to future beneficiaries or participants.
- **Project should benefit customers that meet Low Income Home Energy Assistance Program (LIHEAP) income eligibility.**



## Example LMI Solar Programs

### Non-Profit Examples

#### RE-volv Revolving Fund

RE-volv, a small nonprofit organization headquartered in San Francisco, provides solar financing assistance for small and medium sized nonprofits, which often do not have the funds to cover the upfront cost of a PV system. The RE-volv model uses crowdfunding to help raise the upfront solar array costs and RE-volv leverages student volunteers who assist with its crowdfunding and solar education campaigns.

The nonprofit beneficiary pays RE-volv for its solar installation over time through a lease or power purchase agreement (PPA) financing arrangement. As the nonprofit makes its financing payments, RE-volv reinvests money into a fund that helps offset the cost of additional solar projects for other nonprofits. This revolving fund, called the Solar Feed Fund, is a pay-it-forward model for solar energy that is designed to continually perpetuate itself to help pay for new solar projects.

Crowdfunding is the practice of raising money from many people, typically in small amounts, through online donations. RE-volv offers a nonprofit beneficiary a crowdfunding platform for raising funds to cover the cost of adopting solar. The crowdfunding platform gives prospective donors a two-fold basis for contributing to a campaign: to support the nonprofit beneficiary organization and to support the clean energy economy through a solar investment. Since solar can provide electricity bill savings, it can enable more of a nonprofit's funds to be directed toward its mission-related work. By contributing to a solar crowdfunding campaign, donors committed to an organization can help advance the nonprofit's core mission.



## Review of Financing Mechanisms

There are perhaps countless approaches to financing solar projects in general as well as a number of mechanisms that can help support solar for LMI communities. Reviewing these mechanisms offers an opportunity to identify potential approaches for an initial LMI Solar Assistance Program for the City of Dallas as well as avenues which might be explored in future program iterations. We’ve divided these into two categories: financing approaches typically resulting in immediate participant cost saving, and, financing approaches which may not result in immediate participant cost savings. For this second category, however, it may be possible to establish a modified approach within the program design to improve the potential for immediate cost savings for participants.

For each of these approaches we’ve noted what participants the approach is typically available to



Homeowners



Multi-family building owners,



or renters.

The potential Barrier Considerations  have been noted for each approach while Opportunities  for addressing barriers have been noted for some of these approaches.

### Financing Approaches Typically Resulting in Immediate Participant Cost Savings\*

**Grants:** Customers are provided a solar system free of charge or at reduced cost, likely funded by the government, a non-profit or a philanthropic source. Under this scenario, the customer is the owner of the system immediately and responsible for all upkeep and maintenance of the solar PV system. In addition, as owner, the customer is responsible for monetizing the ITC.



Available to: Homeowners, Multi-family building owners



Barrier Consideration: The financial resources of governments and nonprofits to provide access to heavily subsidized or free solar systems for target customers is insufficient as a long-term sustainable solution for increasing access.

**Property Accessed Clean Energy (“PACE”) Loans:** Customers receive a PACE loan secured by their property and utilize the proceeds to pay for the upfront costs of solar systems. The PACE loan is usually added to the customer’s property tax bill and is secured by the property, not the personal credit of the customer; thus, a PACE loan remains attached to the property through any change in ownership. As the owner of the property, the customer retains ownership of the system, receiving all the federal tax credits and benefits. PACE loan structures vary, however, if established properly the terms and conditions of a PACE loan program can be established in order to save monthly costs for participating customers.



Available to: Homeowners, Multi-family building owners



Barrier Consideration: The customer’s borrowing capacity is often constrained by the value of the home, typically limited to 20% of the assessed value of the property. In addition, Texas currently has only commercial PACE enabling legislation meaning homeowners cannot qualify, however, multi-family buildings typically qualify for commercial PACE programs.



Opportunity: c-PACE costs could be further incentivized for building owners of multi-family buildings with a single electric account structure (single building meter) in exchange for guaranteed cost savings with income qualified tenants.



## 03 Review of Financing Mechanisms

**Tariff On-Bill Financing:** Customers receive a loan secured by a utility tariff on the meter and utilize the proceeds to pay upfront costs of solar installations. The tariff is repaid through a cost recovery charge for a period of time (up to 15 years). Since the tariff is tied to the meter, not the property or the customer, TOB provides an opportunity for our target customers to access funding not based on the customer’s capacity and ability to pay. Under a TOB structure, the customer remains the owner of the project, retaining the ability to monetize the ITC while being responsible for the maintenance of the system. In addition, if the customer sells the property, the new owner will continue making payments for the solar system while also benefitting from the energy generated. The tariff structure allows for the long-term alignment of the cost of system with its benefit.



Available to: Homeowners, Multi-family building owners



**Barrier Consideration:** The customer may have income and/or credit score data below traditionally acceptable loan underwriting criteria. On-bill financing also is not available to customers who will not own the array.



**Opportunity:** Income and/or credit score barriers could be reduced or eliminated through the establishment of a loan loss reserve fund which provides credit guarantees for income eligible subscribers, providing solar array developers with back-up for defaulting subscribers in exchange for the elimination or reduction of income or credit requirements.

**Leases:** Customers enter into a leasing arrangement and agree to a fixed payment schedule over a specified term to pay for use of the system. In a typical solar lease structure, the customer leases a solar system from the lessor (capital provider) for the rights to the electricity output from the solar assets in exchange for a fixed payment schedule. The typical lease is a long-term agreement lasting up to 20 years. Unlike a loan and PACE, under a lease the customer does not own the system and is not responsible for maintenance or upkeep of the system. The lessor (capital provider) receives the available tax benefits and is responsible for efficiently monetizing their value.



Available to: Homeowners, Multi-family building owners



**Barrier Consideration:** Under this scenario, even though the tax credit monetization barrier has been eliminated, customers may still have income and/or credit score data below traditionally acceptable loan underwriting criteria.



**Opportunity:** Income and/or credit score barriers could be reduced or eliminated through the establishment of a loan loss reserve fund which provides credit guarantees for income eligible subscribers, providing solar array developers with back-up for defaulting subscribers in exchange for the elimination or reduction of income or credit requirements.

**Power Purchase Agreements (“PPA”):** Similar to leases, the PPA provides the customer with solar electricity in exchange for regular payments, usually under a long-term contract and usually with no down payment. In many cases, the PPA payment is based on the system production multiplied by the kilowatt-hour (“kWh”) pricing that is outlined in the agreement and likely structured as a fixed rate schedule. In this structure, the PPA provider owns the system, monetizes the tax benefit and provides all the operations, maintenance and replacements required over the life of the contract. At the end of the agreement, the customer can elect to renew the agreement, purchase the system, or request removal of the solar system.



Available to: Homeowners, Multi-family building owners



**Barrier Consideration:** Like loans or leases, PPA’s typically require income and/or credit score data to qualify and customers may be below traditionally acceptable criteria.



**Opportunity:** Income and/or credit score barriers could be reduced or eliminated through the establishment of a loan loss reserve fund which provides credit guarantees for income eligible subscribers, providing solar array developers with back-up for defaulting subscribers in exchange for the elimination or reduction of income or credit requirements.

## Review of Financing Mechanisms

**Community Solar – Ownership:** Customers jointly own a portion of a locally sited PV system. Individual subscribers can utilize cash, loans, or other sources to finance upfront system costs. The customer receives all the benefits of ownership, including ITC, maintenance requirements, and utility bill credits from the utility for the customer’s share in the facility.



Available to: Homeowners, Multi-family building owners, Renters



**Barrier Consideration:** The customer may have income and/or credit score data below traditionally acceptable loan underwriting criteria and may also be unable to monetize the tax benefits associated with ownership of a solar system.



**Opportunity:** Income and/or credit score barriers could be reduced or eliminated through the establishment of a loan loss reserve fund which provides credit guarantees for income eligible subscribers, providing solar array developers with back-up for defaulting subscribers in exchange for the elimination or reduction of income or credit requirements.

**Community Solar – Subscriber:** Customers subscribe to a portion of the energy generated by a remotely sited PV system. Under this model the customer does not own the system nor have a capital/financing requirement to participate but instead subscribes to the project for an allocated portion of the system’s energy output, which is credited to the customer’s bill by the utility in the form of bill credits. Depending on the solar project developer’s subscriber model, contract terms can vary from monthly up to 20 years. The community solar project sponsor, whether community- or privately-owned, absorbs the risks of acquisition, installation, operation and maintenance.



Available to: Homeowners, Multi-family building owners, Renters



**Barrier Consideration:** Many subscriber models require income and/or credit score data to qualify and customers may be below traditionally acceptable criteria.



**Opportunity:** Income and/or credit score barriers could be reduced or eliminated through the establishment of a loan loss reserve fund which provides credit guarantees for income eligible subscribers, providing solar array developers with back-up for defaulting subscribers in exchange for the elimination or reduction of income or credit requirements.

### Financing Approaches Which May Not Result in Immediate Participant Cost Savings\*

**Cash:** Customers utilize their own cash (non-loan) proceeds to pay for the upfront costs of solar systems. The customer utilizes his or her own cash resources to pay for a solar system upfront without financing.



Available to: Homeowners, Multi-family building owners



**Barrier Consideration:** The inability to fully monetize benefits available to higher-income solar buyers, such as the Federal Incentive Tax Credit (ITC) or other tax benefits associated with ownership of a solar system significantly reduces the economic benefit to low-income customers.



## Review of Financing Mechanisms

**Loans:** Customers receive a loan from the installer, bank or other entity and pay costs over a period of time. The customer and capital provider establish a fixed repayment schedule that will likely be repaid over an 8 to 20-year period. During this period, the customer owns the system, receiving all available tax incentives while maintaining full responsibility for the system’s upkeep.



Available to: Homeowners, Multi-family building owners

 **Barrier Considerations:** Similar to cash financing, the customer may lack the ability to monetize ITC or other tax benefits, in addition, the customer may have income and/or credit score data below traditionally acceptable loan underwriting criteria.

 **Opportunity:** For multi-family properties with electric utility under a single property-owner account, incentivization may increase building owner interest in participation and may offer potential for energy cost savings for both the building owner and renter.

**Building Owners:** Customers receive access by virtue of residing in a property in which the building owner has implemented either an onsite or community solar project. In this case, the customer does not pay the electric utility directly as it is included as part of the overall lease or rental payment. The financial benefits of the solar installations accrue primarily to the building owner, who can choose if and how to distribute any electricity savings to residents, including reductions in lease/rental payments, property assessment fees or other arrangements required by the US Department of Housing and Urban Development (“HUD”).



Available to: Homeowners, Multi-family building owners, Renters

 **Barrier Consideration:** Customer’s ability to passively participate in, or receive financial benefit from solar PV installations is directly related to the level of interest by participating building properties. Further more, this strategy is complicated if not impossible to implement in multi-family properties where units are under individual electric utility accounts.

 **Opportunity:** For multi-family properties with electric utility under a single property-owner account, incentivization may increase building owner interest in participation and may offer potential for energy cost savings for both the building owner and renter.

**Utility:** Customers pay for electricity provided by their utility, who is responsible for procuring solar resources. Many utilities (municipal, rural electric cooperative and investor-owned) have developed, acquired and implemented solar projects. As a utility investment, the solar project costs are spread across the entire rate base without regard to customer income or credit score. In some cases, the “green” energy is a premium product and part of a special customer tariff, typically referred to as a “green pricing program” or “green tariff.”



Available to: Homeowners, Multi-family building owners, Renters

 **Barrier Consideration:** Most utility provided solar products are premium products which increase the cost per kWh consumed, increasing the energy burden on the customer.

 **Opportunity:** Incentivization of utility provided solar options for LMI customers can help convert a “premium” product to a vehicle for participant cost savings. In that case, this method can be effective in increasing the percentage of solar generation per customer while potentially providing some level of economic benefit.

\*Financing mechanisms listed are modified from “Inclusive Solar Finance Framework” by Vote Solar

## 04 Dallas LMI Community and Solar Potential

### The Need to Focus on Low and Moderate Income Solar Potential

Solar PV systems provide a wide range of potential benefits, including long-term energy cost savings, energy resilience, and reductions in air pollution including particulate matter and greenhouse gas (GHG) emissions – with positive implications for environmental and human health. Currently, most of the solar customers in the United States are in the same demographic -middle to upper class, middle-aged, and usually male. “Rooftop Solar Technical Potential for Low-to-Moderate Income Households in the United States”, a recent study by NREL, found that the median income of households that install solar panels in some states was roughly \$32,000 higher than the median household income in those states.

The growth of solar in the United States provides a tremendous opportunity to address some of the greatest challenges faced by lower-income communities: the high cost of housing, unemployment, and pollution. Solar can provide long-term financial relief to families struggling with high and unpredictable energy costs, living-wage jobs in an industry where the workforce has increased 168% over the past seven years, and a source of clean, local energy sited in communities that have been disproportionately impacted by traditional power generation. Yet, access to distributed solar power remains elusive for a significant slice of the U.S. population, particularly low- and moderate-income (LMI) communities— households whose income is 80% or less of the area’s median.

Although solar PV costs have dropped significantly in recent years, upfront installation costs are still persistently out of reach for most LMI populations, which, by definition, have less disposable income. Beyond having limited cash-on-hand for solar power purchases, LMI populations face other obstacles in pursuing distributed solar systems, including:

- frequently lower credit scores, making it difficult to attain a loan for solar investments;
- insufficient tax burden to benefit from state and federal solar tax incentives; and
- lower rates of homeownership and higher likelihood of living in multifamily housing units—making for limited control over decisions about utilities, especially rooftop solar.

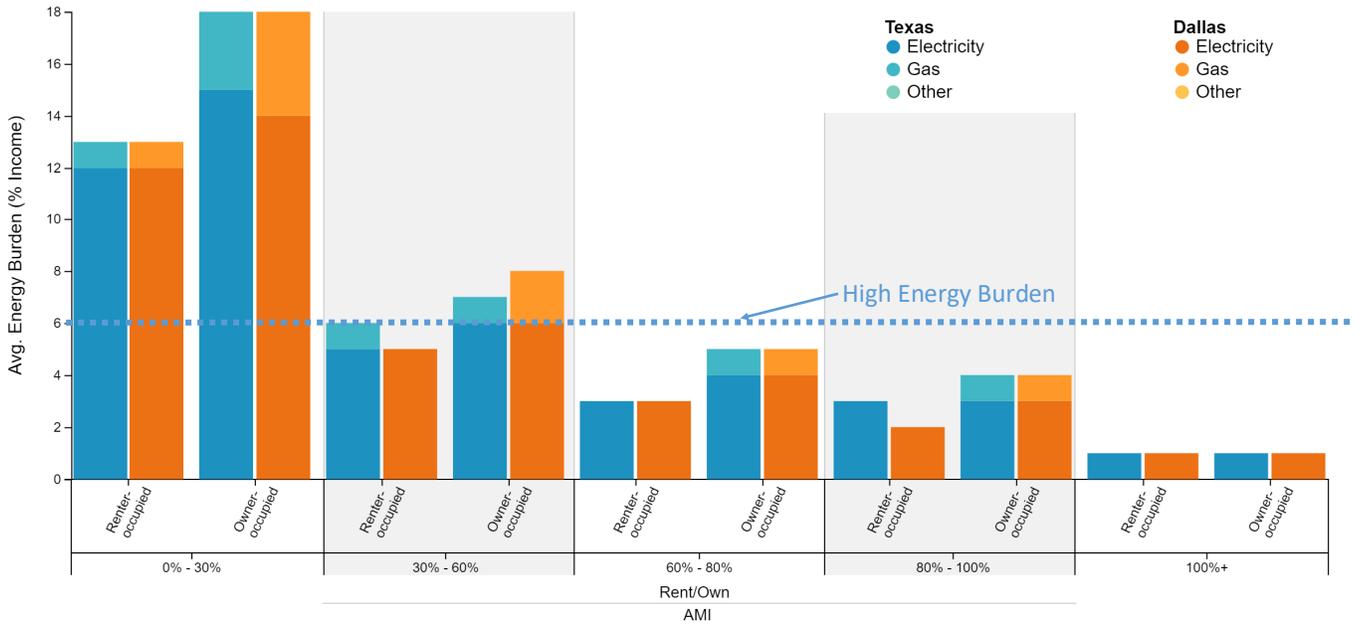
### Energy Burden In Dallas

A household’s energy burden—the percentage of household income spent on energy bills—provides an indication of energy affordability. Researchers define households with a 6% energy burden or higher to experience a high burden. Factors that may increase energy burdens include the physical condition of a home, a household’s ability to invest in energy-efficient upgrades, and the availability of energy efficiency programs and incentives.

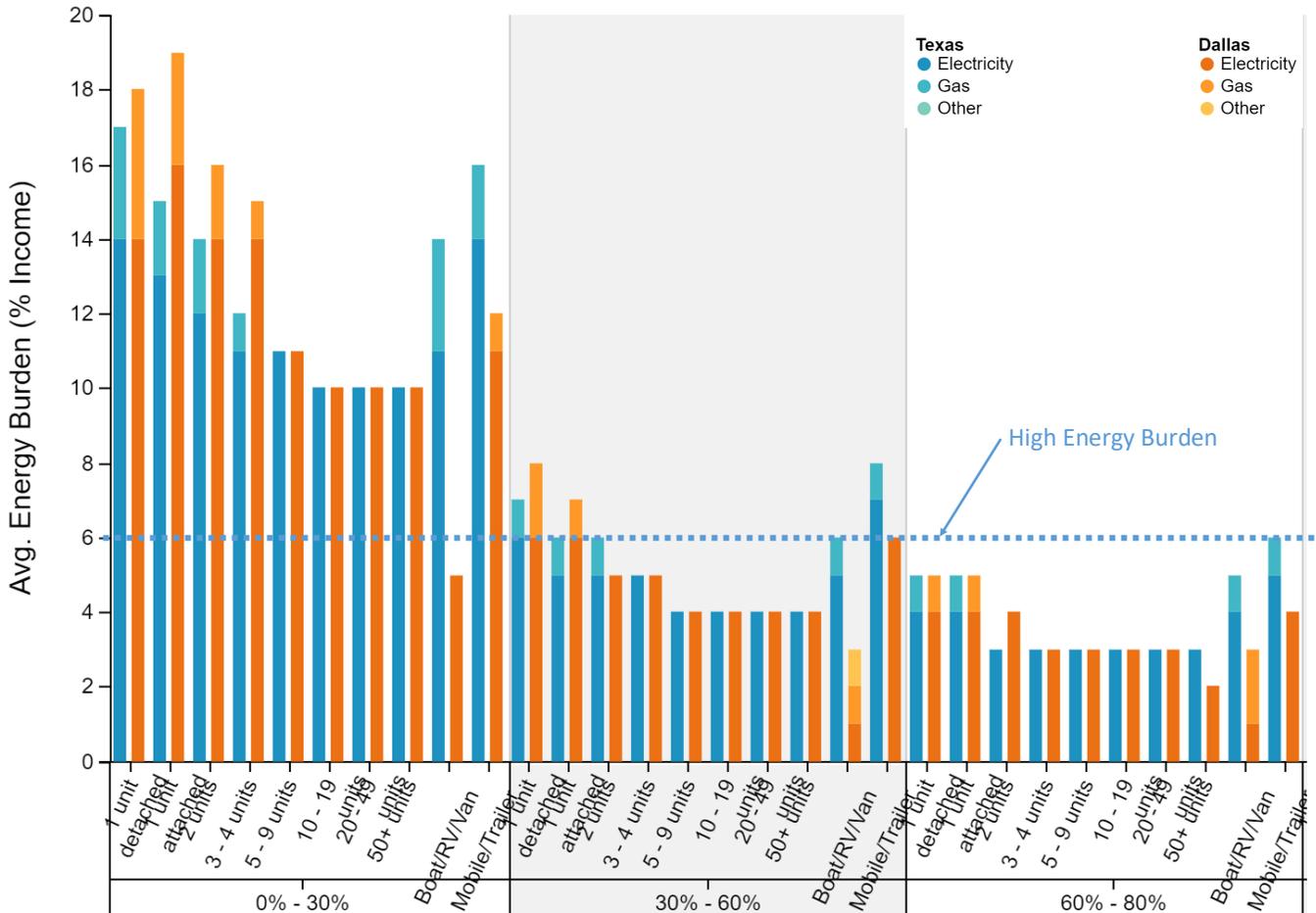
See the charts on the following page for a breakdown of households with high energy burden.



Energy Burden in Dallas—Renter vs Homeowner by Income Level



Energy Burden In Dallas— LMI Energy Burden by Income and Housing Type



Dallas LMI Community and Solar Potential

Energy Burden In Dallas (continued)

As illustrated in the charts on the previous page, based on AMI income, the households with the most significant housing burden over 6% tend to differ by income category. Households in the 0-30% AMI income category, those with the highest energy burden tend to be renters and homeowners in all housing types. Households in the 30-60% AMI income category, those with the highest energy burden tend to be homeowners and those in 1 unit detached, 1 unit attached, and mobile homes. On average, households in the 60-80% AMI income category tend not to have “high” energy burden, however, households in this income category still have energy burden levels that are 150% to 250% the Dallas average household energy burden.

LMI Energy Expenditures in Dallas by Building Type and Income Level

Housing Type	0%-30% AMI Energy Burden Range: 250% - 950% Dallas Average					30%-60% AMI Energy Burden Range: 150% - 400% Dallas Average					60%-80% AMI Energy Burden Range: 100% - 250% Dallas Average				
	Housing Count	Share of LMI Segment	Ave Total Energy \$	Ave Electric \$	Electric \$ vs LMI Seg Ave	Housing Count	Share of LMI Segment	Ave Total Energy \$	Ave Electric \$	Electric \$ vs LMI Seg Ave	Housing Count	Share of LMI Segment	Ave Total Energy \$	Ave Electric \$	Electric \$ vs LMI Seg Ave
1 unit detached	34,635	37.1%	\$2,374	\$1,857	126%	42,266	41.2%	\$2,367	\$1,857	125%	25,591	43.3%	\$2,398	\$1,880	137%
1 unit attached	2,535	2.7%	\$2,039	\$1,740	118%	2,385	2.3%	\$2,026	\$1,733	117%	1,761	3.0%	\$1,953	\$1,661	121%
2 units	2,405	2.6%	\$1,677	\$1,499	102%	1,823	1.8%	\$1,526	\$1,405	95%	830	1.4%	\$1,844	\$1,652	121%
3 - 4 units	5,953	6.4%	\$1,548	\$1,485	101%	5,711	5.6%	\$1,381	\$1,329	90%	2,975	5.0%	\$1,401	\$1,342	98%
5 - 9 units	12,996	13.9%	\$1,274	\$1,255	85%	12,627	12.3%	\$1,258	\$1,231	83%	6,405	10.8%	\$1,261	\$1,242	91%
10 - 19 units	14,033	15.1%	\$1,246	\$1,219	83%	16,084	15.7%	\$1,188	\$1,170	79%	8,792	14.9%	\$1,188	\$1,173	86%
20 - 49 units	7,569	8.1%	\$1,211	\$1,185	81%	10,695	10.4%	\$1,169	\$1,156	78%	6,187	10.5%	\$1,155	\$1,144	84%
50+ units	11,783	12.6%	\$988	\$953	65%	9,784	9.5%	\$1,091	\$1,054	71%	5,835	9.9%	\$1,034	\$1,000	73%
Boat/RV/ Van	82	0.1%	\$425	\$403	27%	34	0.0%	\$806	\$399	27%	23	0.0%	\$1,532	\$549	36%
Mobile/ Trailer	1,249	1.3%	\$1,985	\$1,850	126%	1,272	1.2%	\$1,917	\$1,749	118%	660	1.1%	\$2,188	\$2,061	150%
	93,240		\$1,695	\$1,471		102,681		\$1,716	\$1,481		59,059		\$1,756	\$1,506	

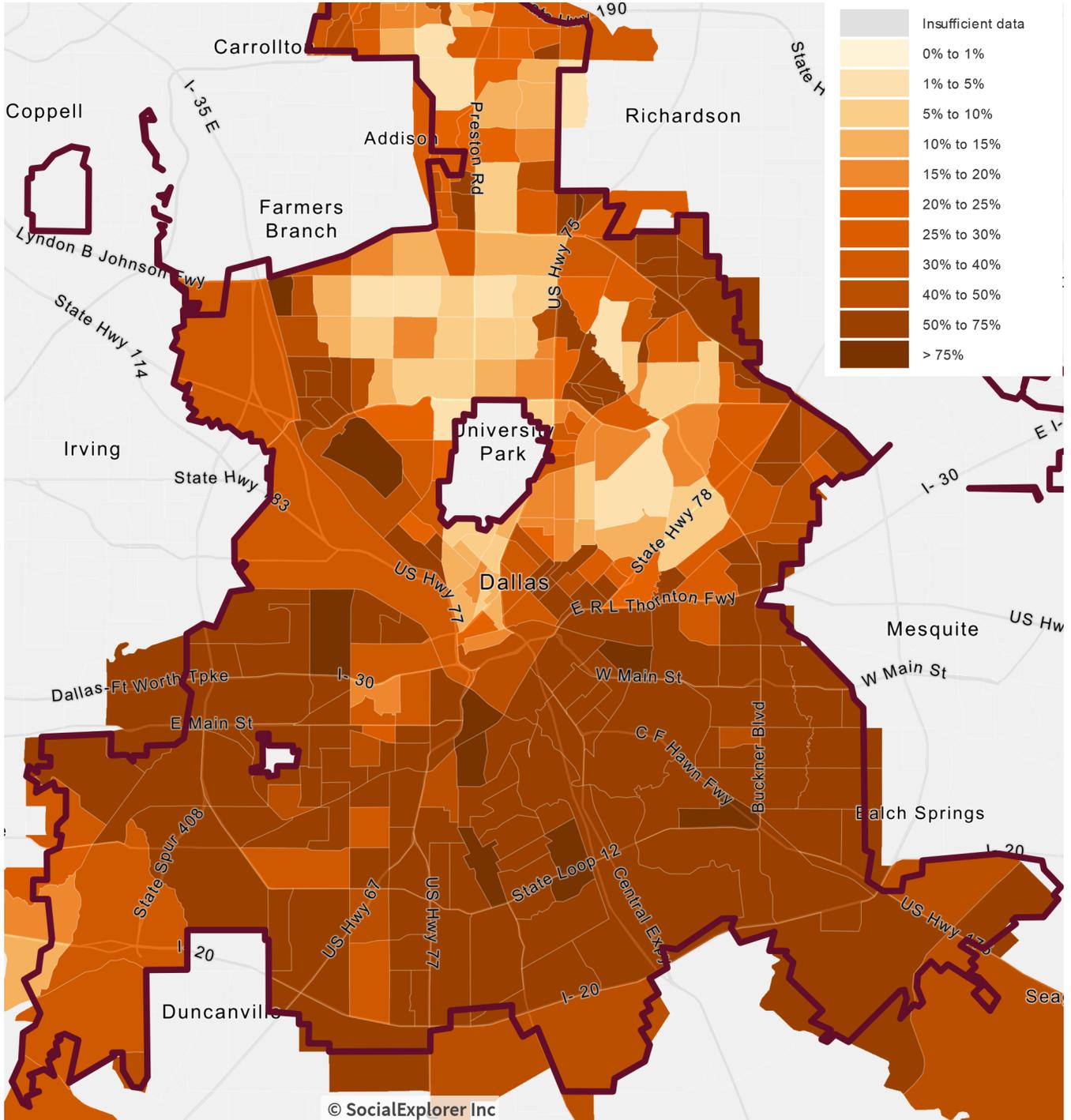
Solar programs oriented towards reducing energy poverty for low income households may have the greatest benefit and impact for those low income households whose annual electric expenses are highest. In the chart above, those household’s whose annual electric expenses are higher than the average for their LMI income segment are highlighted in red.



### Dallas LMI Community and Solar Potential

#### Low Income Share of Population by Census Tract

Below is an estimation of the “struggling to poor” share of the total population by census tract. “Struggling to poor” is defined as under 2 times poverty rate.

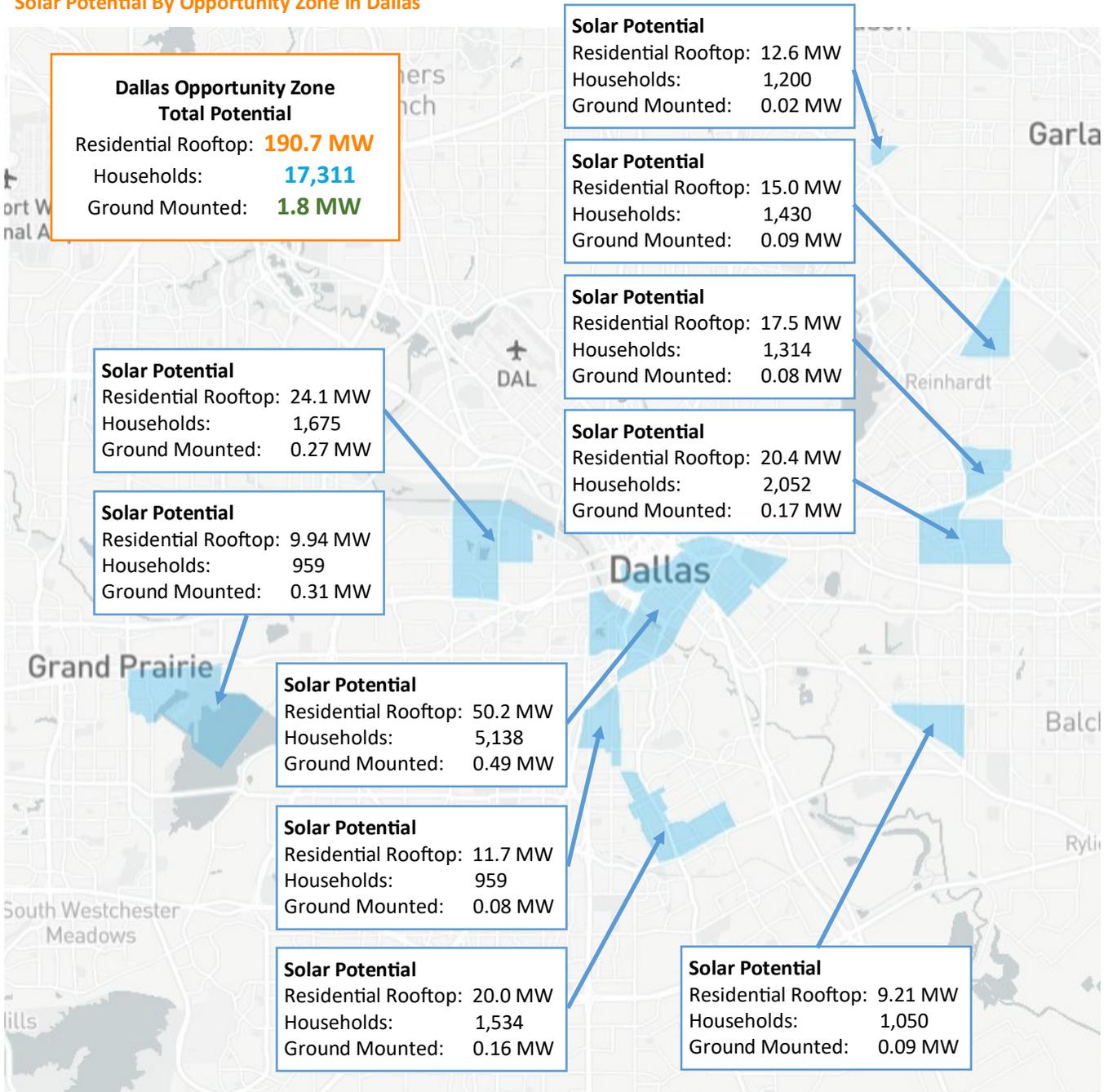


## Dallas LMI Community and Solar Potential

### Opportunity Zone Impact on Solar Investments

Opportunity Zones are an economic development tool that provides economic benefit in the form of tax incentives to investors who invest in qualifying projects in distressed areas. All solar developers investing in economically distressed communities through the Opportunity Zones program are offered three tax incentives—Capital Gains Deferral, Step-Up in Basis, Tax Forgiveness. For large scale arrays, or ventures which develop a large number of small arrays, these tax benefits can significantly increase the investor’s economic benefit of the solar development. Below is an estimation of the total residential and ground mounted solar installation capacity by opportunity zone in Dallas.

### Solar Potential By Opportunity Zone in Dallas



## Dallas LMI Community and Solar Potential

### Considerations of LMI Community Potential for Program Design

#### Energy Burden vs Energy Poverty

Understanding energy burden levels within targeted LMI communities is an important consideration, however, energy burden alone is not necessarily an indicator of the level of need within a household. It is possible for a household to have a low annual income when compared to area median income levels (AMI) yet not be a low wealth household (for example, a retired couple with significant investments but low annual withdraws). Consequently, energy burden alone does not necessarily reflect those households who are living in **energy poverty—those households who must go without energy needs met or who must choose between energy needs and other necessities**. Unfortunately, the datasets currently available which we have reviewed in this report do not include metrics for determination of energy poverty.

A final LMI solar program design may look to address this issue by including additional eligibility considerations in addition to household income levels. Perhaps the easiest method for this is to simply define **eligibility based on eligibility for other programs such as LIHEAP or WAP**.

#### Quantifying Need

As noted above, energy burden alone may not be entirely reflective of need, however, studying the data available on energy expenditures by housing type and LMI income level can help to establish an understanding of the order of magnitude of need. Based on a review of the average percentage energy burden by income and housing type (see LMI Energy Burden by Income and Housing Type chart) and the average energy expenditures by each segment (see LMI Energy Expenditures in Dallas by Building Type and Income Level) a rough quantification of energy cost relief need can be calculated.

Within the 0-30% AMI income level, annual energy expenditures total \$158 million and adjusting the energy expenditure of this population to meet a 6% energy burden level would require over \$90 million in annual cost relief. Within the 60%-80% AMI income level, annual energy expenditures total \$176 million and adjusting the energy expenditure of this population to meet a 6% energy burden level would require over \$24 million in annual cost relief. For the average LMI household currently experiencing energy poverty in Dallas, saving \$490 to \$580 in annual energy costs would lift them out of energy poverty. Achieving that would require leveraging \$90 million to \$115 million in targeted annual benefits.

#### Targeting Within the LMI Community

The City of Dallas may choose to have final program designs simply establish eligibility based on LMI income levels and program qualifications such as LIHEAP. Alternatively, the City could look to refine population targeting further to guide relief to those portions of qualifying households who, on average, have the highest energy burden among all LMI households. Below are the sub-categories of LMI households which could be targeted in a refined program qualification approach:

Income Level	Housing Type	Total Housing Count
0%-30% AMI	All	92,340
30%-60%AMI	1 unit detached	42,266
	1 unit attached	2,385
	mobile homes	1,272
		<b>138,263</b>



# WHAT IS COMMUNITY SOLAR?

Community Solar – sometimes called Solar Gardens - are solar photovoltaic (PV) systems that provide electricity to participating subscribers.

## WHO CAN SUBSCRIBE TO COMMUNITY SOLAR?

Anyone!



Homeowners



Renters



Businesses



Non-profits



Governments

Anyone who uses electricity can become a Community Solar subscriber in Rhode Island. Community Solar is especially great for those who cannot have solar where they live or work or who cannot afford the up-front costs of owning their own solar pv system.

## WHY SUBSCRIBE TO A COMMUNITY SOLAR PROJECT?



## HOW DOES COMMUNITY SOLAR WORK?

1



A Community Solar array is built in a sunny location to efficiently produce renewable electricity.

2



Residents and Businesses subscribe for the amount of solar electricity they want.

3



Each subscriber's electric utility credits their account with the electricity created by their share of the Community Solar project.

4



Subscribers electric utility bill shows the credit and cost savings.

## Program Options

Program concept options have been organized into three categories based on anticipated beneficiaries:

- Program options for LMI Homeowners and Multi-Family Residents
- Program Options for LMI Renters
- Program Options for LMI Homeowners



### Program Options for LMI Homeowners and Multi-Family Residents

#### Option 1: City Sponsored Community Solar Development

City of Dallas to issue an RFP for a community solar array on a City controlled site such as a capped landfill, brownfield site, or underutilized City property. Terms of the RFP include leasing the required land to the solar developer for \$1, a project initiation grant to be provided to the solar developer at the completion of a successfully executed solar development agreement, and a project success grant to be provided to the solar developer after achieving the LMI subscription target.

In addition to the grant incentives, the City of Dallas will help mitigate the developer's risk of loss due to defaulting subscribers by entering into an anchor subscriber agreement. The anchor subscriber agreement will have a minimum off-take array's annual energy generation to be applied to City facilities, but may be flexibly adjusted to temporarily cover payment defaults by qualifying LMI subscribers. The City of Dallas anchor subscriber agreement shall be for a minimum of 25% and a maximum of 75% of array energy generation on a monthly basis.

In exchange, the solar developer shall construct, market, and manage the community solar array with a minimum targeted LMI household requirement of 75% of array offtake. Solar developer shall be responsible to replace subscribers which default out of the program with other targeted LMI subscribers. The successful solar developer will be selected based upon qualifications, capabilities, the proposed LMI subscriber rate and annual savings (meeting or surpassing minimum thresholds), and the greatest of proposed targeted LMI subscribers served beyond the minimum requirement. Development proposals to receive bonus selection review points based on proposed training and job creation for targeted LMI community members, if any.

Opportunity Zone Option: Project site selection is encouraged to prioritize sites within City of Dallas Opportunity Zones which meet project criteria, if any such sites exist.

Environmental Improvement Option: Support community environmental improvement by requiring solar development proposals to meet or exceed the "Medium Quality Habitat" level of the State of Minnesota "Assessing and Prioritizing Project Sites, Urban Landscapes", or equivalent.

#### Option 2: City Subscription Managed Community Solar Development

This option is a variation on Option 1, however, in lieu of the project success grant, the City of Dallas commits to managing the LMI subscriptions. Subscription management could occur through the Dallas Housing Authority and coordinated with the voucher programs the department currently manages, or could occur through the Dallas Public Facilities Corporation and be coordinated with that department's developments.

#### Option 3: LMI Consumer Choice Grant

City of Dallas to issue a competitive RFP to retail electric power providers capable of operating in the Dallas market. The competitive RFP to request electric retailers to submit solar/renewable energy program offerings designed to serve LMI community members. The program offering which maximizes the total number of guaranteed LMI participants (meeting or surpassing minimum thresholds) as well as maximizing guaranteed savings per individual participants (meeting or surpassing minimum thresholds) to be awarded a project initiation grant to be awarded to the retail electric power provider at the completion of a successfully executed agreement, and a project success grant to be awarded to the retail electric provider after achieving the LMI subscription target. The renewable energy offered may originate from sources inside or outside of the City of Dallas, however, proposals which utilize renewable energy power sources located inside of the City shall receive bonus points in the selection process. The retail electric provider shall be responsible for marketing and obtaining LMI subscribers, however, the City will assist in communicating the program offering and benefits to targeted LMI communities.



### Program Options for LMI Homeowners and Multi-Family Residents (Continued)

#### Option 4: Community Action Solar Development

City of Dallas to issue an RFP for a solar Power Purchase Agreement serving select City of Dallas facilities. The solar development may occur on City facility rooftops/site or in a centralized location. The successful solar developer will be selected based upon qualifications, capabilities, and the proposed PPA rate and annual savings (meeting or surpassing minimum thresholds). Development proposals to receive bonus selection review points based on proposed training and job creation for targeted LMI community members, if any.

In conjunction with the execution of the project agreement, the City of Dallas to establish a policy to track all electric power cost savings generated through the PPA agreement and allocate the savings in an Energy Burden Relief Fund. Funds allocated to be distributed to targeted LMI households on a sliding scale designed to reduce each recipient's household annual energy costs to below 6% of household income (estimated at \$400 to \$600 per household per year). Fund distribution shall be integrated into a qualified local energy assistance program such as Community Council of Greater Dallas' Rental & Utility Assistance program.

#### Option 5: LMI Utility Bill and Renewable Energy Clinic

City of Dallas to issue an RFP for qualified non-profit energy efficiency service providers, LMI advocate agencies, and community action agencies, to establish a Utility Bill Clinic program. The program design shall focus on proactive outreach to targeted LMI community members with a minimum annual participation target. The clinic to review participant's utility bills, explain charges, identify compatible retail electric provider offerings with more favorable rates and total annual costs based on participant's use case with a particular focus on identifying renewable energy options, recommend energy efficiency strategies, and identify energy efficiency programs or incentives the participant may qualify for. The successful program proposal shall be selected based upon qualifications, capabilities, the greatest number of targeted LMI households served beyond the minimum requirement. The project shall have a minimum requirement for targeted LMI households served as well as a targeted minimum annual savings per household and a minimum number of households switching to a renewable energy offering.

Option: In lieu of issuing an RFP, a pilot project could be established through the City of Dallas Community Center Social Services Program.



### Program Options for LMI Multi-Family Residents

#### Option 6: Multi-Family Building Owner Solar Loan Program

City of Dallas to collaborate with a qualified Community development financial institution CDFI, such as The Real Estate Council (TREC) Community Fund to establish a suite of solar financial tools to support qualifying multi-family building owners of multi-family buildings with single payer electric accounts (all housing units on a single electric service account) interested in installing solar systems to serve tenants. To qualify, properties served through the program must serve a minimum requirement for targeted LMI households and 75% of the solar infrastructure installed through the loan program must serve tenant LMI households directly, providing each with a minimum savings for each kWh delivered.

The program offering to include three components: 1) an interest rate buy-down, which reduces the interest rate paid by property owners as compared to a traditional market-rate loan; 2) a loan loss reserve, which serves as a guarantee against default and encourages lenders to loan to less creditworthy customers; and 3) an additional LMI Tenant Energy Burden Reduction incentive to further reduce the property owner's overall repayment obligation based on the level of achieved energy burden reduction beyond program minimums for LMI households served by the solar infrastructure. Repayment of principal will be re-invested into the program as a revolving loan.





### Program Options for LMI Multi-Family Residents(Continued)

#### Option 7: Multi-Family On-Site Solar Assistance Grant Pilot Project

City of Dallas to issue an RFP for solar array proposals from qualifying multi-family building owners of multi-family buildings with single payer electric accounts (all housing units on a single electric service account) for solar systems serving and providing direct energy cost savings benefits to targeted LMI tenants with a minimum of 75% of the energy produced by the solar array directly benefiting participating LMI households. Multi-family building owner grant recipients shall receive a project initiation grant to be awarded at the completion of a successfully executed solar agreement in a sliding scale amount based on the number of targeted LMI households served and the total annual benefit provided for participating LMI households beyond grant minimum requirements. Projects which include on-site energy storage delivering a minimum of emergency power for building tenants to receive bonus points in review. To qualify for the grant, individual projects shall meet a minimum requirement for targeted LMI households served as well as a targeted minimum annual savings per household.



### Program Options for LMI Homeowners

#### Option 8: Virtual Residential PACE Pilot Program

City of Dallas to establish a loan fund for qualifying targeted LMI homeowners for installation of solar arrays. The loan shall have repayment terms based on the homeowner's income and energy burden levels, with length of loan repayment and interest rates applied on a sliding scale adjusting with the intent to create a minimum anticipated annual energy cost savings necessary to reduce the participant household's energy burden at or below 6%. Loans, and energy savings benefits, shall be transferable with property ownership. Loan repayment shall be re-invested into the program as a revolving loan fund.





## Recommendations and Next Step Action Plan

We recommend the City of Dallas consider implementing 2 or three pilot project efforts with the current LMI Solar Assistance Program set-aside funds. By executing more than one pilot project, the intent is to test project options which have different target project development pathways and LMI household participant acquisition. The City may then choose to continue one or more of the programs, or create a hybrid program based on the Dallas market specific results of the pilot project implementations.

### Recommended Pilot Projects—Grant Based

#### City Sponsored Community Solar Development (Option 1)

City of Dallas to issue an RFP for a community solar array on a City controlled site such as a capped landfill, brownfield site, or underutilized City property. Terms of the RFP include leasing the required land to the solar developer for \$1, a project initiation grant to be provided to the solar developer at the completion of a successfully executed solar development agreement, and a project success grant to be provided to the solar developer after achieving the LMI subscription target. To help mitigate developer risk of loss due to defaulting subscribers, we recommend the City of Dallas propose to be an anchor tenant, with offtake rates flexibly adjusted to temporarily cover payment defaults by qualifying LMI subscribers. The project shall have a minimum targeted LMI household requirement of 75% of array offtake, estimated to be a minimum of 375 LMI households served with a minimum 15% electric cost savings each household. We recommend selecting a project site within a City of Dallas Opportunity Zone which meet project criteria, if any such sites exist. To improve the environmental benefits of the solar installation, we encourage the City to consider requiring solar development proposals to meet or exceed the “Medium Quality Habitat” level of the State of Minnesota “Assessing and Prioritizing Project Sites, Urban Landscapes”, or equivalent.

**LMI Segments Served:**   Homeowner, Single Family Renter, Multi-Family Renters at 0%-80% AMI Income

**Estimated LMI Households Served:** 375

**Investments:**

Site provided to developer at no cost (\$1 land lease), realized project value: \$115,000 - \$173,000

Grant funding: \$300,000 (awarded in two parts)

**Estimated LMI Benefit** (24 year project life): \$1,998,000

#### Multi-Family On-Site Solar Assistance Grant Pilot Project (Option 7)

City of Dallas to issue an RFP for solar array proposals from qualifying owners of multi-family buildings with single payer electric accounts (all housing units on a single electric service account) for solar systems serving and providing direct cost savings benefits to targeted LMI tenants and a minimum of 75% of the energy produced by the solar array directly benefiting participating households. Multi-family building owner grant recipients shall receive a project initiation grant to be awarded at the completion of a successfully executed solar agreement in a sliding scale amount based on the number of targeted LMI households served and the total annual benefit provided for participating LMI households beyond grant minimum requirements. Projects which include on-site energy storage delivering a minimum of emergency power for building tenants to receive bonus points in review. To qualify for the grant, individual projects shall have a minimum of 5 LMI households served with a minimum 15% electric cost savings each household.

**LMI Households Served:**  Multi-Family Renters at 0%-80% AMI Income

**Estimated LMI Households Served:** 120

**Investments:**

Grant funding: \$200,000 total, individual awards vary based on sliding scale qualifications

**Estimated LMI Benefit** (24 year project life): \$640,000

Optional Program Modification: The City may consider providing technical assistance to qualifying multi-family building owners during a preliminary phase. Through this technical assistance phase building owners could receive support in evaluating the solar potential for their property and preliminary project estimates provided by pre-qualified vendors. Technical assistance could also include identification of additional beneficial resources such as PACE financing and energy efficiency programs for which the property may qualify.

## Recommendations and Next Step Action Plan

### Recommended Pilot Projects—Non-Grant Based

#### Community Action Solar Development (Option 4)

In light of the City’s commitment to achieving 100% renewable for City facilities, we recommend the City of Dallas issue an RFP for a 2MW solar Power Purchase Agreement serving City of Dallas facilities. The solar development may occur on City facility rooftops/site or in a centralized location, however, the renewable energy credits (RECs) should be retained by the City for GHG accounting purposes. The successful solar developer will be selected based upon qualifications, capabilities, and the proposed PPA rate and annual savings (meeting or surpassing minimum thresholds). Development proposals to receive bonus selection review points based on proposed training and job creation for targeted LMI community members, if any.

In conjunction with the execution of the project agreement, the City of Dallas to establish a policy to track all electric power cost savings generated through the PPA agreement and allocate the savings in an Energy Burden Relief Fund. Funds allocated to be distributed to targeted LMI households on a sliding scale designed to reduce each recipient’s household annual energy costs to below 6% of household income (estimated at \$400 to \$600 per household per year). Fund distribution shall be integrated into a qualified local energy assistance program such as Community Council of Greater Dallas’ Rental & Utility Assistance program.

**LMI Segments Served:**  Homeowner, Single Family Renter, Multi-Family Renters at 0%-30% AMI Income.

**Estimated LMI Households Served:** 50 to 80

#### Investments:

No initial grant investments are required for this pilot project. The City’s commitment to direct the energy savings generated through the PPA agreement into the Energy Burden Relief Fund is the only financial investment required.

**Estimated LMI Benefit** (24 year project life): \$700,000

### Next Step Action Plan

We recommend the following next steps:

A: Finalize decision to proceed with recommended pilot project(s). For each of the recommended options, the following actions are suggested:

#### B: City Sponsored Community Solar Development

1. City may issue a Request for Information to identified potential respondents to collect initial feedback on pilot project concept and to validate sufficient interest by developers experienced in delivering projects in the market.
2. Identify potential solar array sites under the control of the City or an appropriate project partner.
3. Conduct a site feasibility assessment of selected sites to determine sites which meet project criteria.
4. Select preferred site(s).
5. Confirm / establish targeted LMI household definition, minimum participation, and eligibility thresholds.
6. Confirm / establish targeted minimum LMI household benefit threshold.
7. Identify pathways for communications with targeted LMI community members, including “trusted partners” who can assist with communicating the program opportunities and benefits.
8. Engage local community partners to establish mechanisms to support desired job training component. Collaborate to adequately define and describe resources and mechanisms for inclusion in procurement document.
9. Determine appropriate City of Dallas procurement method—Request for Bids, Request for Proposals, Request for Competitive Sealed Proposals, etc. (note: due to the encouraged collaborative nature of portions of the project concept such as potential job training and creation, we anticipate the Request for Proposals as the appropriate vehicle)
10. Develop the Request for Proposals (or other selected procurement vehicle document).
11. Review and select successful respondent.
12. Develop communications and educational materials to support effective engagement with targeted LMI households.



## Next Step Action Plan (continued)

## C: Multi-Family On-Site Solar Assistance Grant Pilot Project

1. Establish grant qualifications, sliding scale metrics supporting City goals.
2. Establish grant management responsibility and protocol within City departments or partner organization.
3. Confirm / establish targeted LMI household definition, minimum participation, and eligibility thresholds.
4. Confirm / establish targeted minimum LMI household benefit threshold.
5. Identify pathways for communications with targeted LMI community members, including “trusted partners” who can assist with communicating the program opportunities and benefits.
6. Decide if program will include the optional technical assistance modification. If technical assistance will be included, providers must be selected. Options for technical assistance include City or other public agency staff, hired consultant support, selection of pre-qualified solar vendors, or a hybrid (such as a hired consultant to work to define technical assistance scope, identify potential vendors and support a pre-qualification process).
7. Determine appropriate City of Dallas procurement method—Request for Bids, Request for Proposals, Request for Competitive Sealed Proposals, etc. (note: as a grant program, we anticipate either simply a “Grant Application” and announcement, or the Request for Proposals as the appropriate vehicle)
8. Develop the Grant Announcement and Grant Application documentation, or Request for Proposals (or other selected procurement vehicle document).
9. Review and select successful respondents.
10. Develop communications and educational materials to support effective engagement with targeted LMI households.

## D: Community Action Solar Development

1. Collect site electricity use data of key City of Dallas sites (including total annual kWh consumed, rate tariff, demand charges, and total monthly/annual electric utility cost).
2. Establish a preliminary “short list” of facilities based on sites most likely to have highest economic benefit from a PPA (typically sites with low or no Demand Charges and higher energy consumption tariff structures).
3. Conduct a site feasibility assessment of key City of Dallas sites.
4. Select sites to be included in pilot program.
5. Confirm / establish targeted LMI household definition, minimum participation, and eligibility thresholds.
6. Confirm / establish targeted minimum LMI household benefit threshold.
7. Engage local community partners to establish appropriate fund distribution mechanism (such as Community Council of Greater Dallas’ Rental & Utility Assistance program).
8. Determine appropriate City of Dallas procurement method—Request for Bids, Request for Proposals, Request for Competitive Sealed Proposals, etc. (note: due to the service nature of a PPA agreement, we anticipate either a Request for Proposals or Request for Bids as appropriate vehicle)
9. Develop the Request for Proposals (or other selected procurement vehicle document).
10. Review and select successful respondent.
11. Establish internal City of Dallas policy regarding tracking and utilization of energy cost savings for the Energy Burden Relief Fund.
12. Implement appropriate energy savings tracking mechanisms and fund development.



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