

ADVANCING SMALL BUSINESS SOLAR EQUITY

# APPENDIX G: SOLAR TECHNICAL ASSISTANCE PROCESS

LAKE STREET–WEST BROADWAY–UNIVERSITY AVENUE  
MINNEAPOLIS AND SAINT PAUL, MINNESOTA



Photo by Brandon Stengel for BWBR Architects, Inc ([www.bwbr.com](http://www.bwbr.com))

## Authors:

Matt Kazinka, Lake Street Council  
Aaron Backs and Diana McKeown, Great Plains Institute (GPI)  
William Weber, Jr, William Weber Consulting LLC

## Contributor:

Neighborhood Development Center (NDC)  
Northside Economic Opportunities Network (NEON)



**WILLIAM WEBER CONSULTING, LLC**



**GREAT PLAINS INSTITUTE**

## **Appendix G: Solar Technical Assistance Process**

### **ADVANCING SMALL BUSINESS SOLAR EQUITY**

#### **About this document**

This document is an appendix of “Advancing Small Business Solar Equity: Final Technical Insights Report” (Kazinka et al. 2024), a report published by Lake Street Council and its partners as an outcome of their participation in the Solar Energy Innovation Network. The full report and other appendices can be found at [www.visitlakestreet.com/business-blog/sein-report](http://www.visitlakestreet.com/business-blog/sein-report).

#### **About the Solar Energy Innovation Network**

The Solar Energy Innovation Network (SEIN) seeks to overcome barriers to solar adoption by connecting teams of stakeholders who are pioneering new ideas with the resources they need to succeed. SEIN is funded by the US Department of Energy Solar Energy Technologies Office and is led by the National Renewable Energy Laboratory.

Teams that participate in SEIN receive direct funding and analytical support from the US Department of Energy national laboratories and participate in peer-to-peer learning with other teams tackling similar challenges. These teams are developing and documenting their solutions for solar adoption with scale in mind so that others can adapt those solutions to their own contexts. Ultimately, the true impact of these teams’ efforts will be to enable a wide array of communities to adopt solar solutions that meet their needs in their contexts.

#### **Disclaimer**

This work was authored by Lake Street Council et al. under Subcontract No. SUB-2022-10131 as part of the Solar Energy Innovation Network, a collaborative research effort administered by the National Renewable Energy Laboratory under Contract No. DE-AC36-08GO28308 funded by the U.S. Department of Energy’s (DOE) Office of Energy Efficiency and Renewable Energy Solar Energy Technologies Office. The views expressed herein do not necessarily represent the views of Alliance for Sustainable Energy, LLC, the DOE, or the U.S. Government.

## Appendix G: Solar Technical Assistance Process

### ADVANCING SMALL BUSINESS SOLAR EQUITY

#### Table of Contents

Overview .....	1
Stage 1: Capacity building.....	2
Stage 2: Outreach & identification .....	3
Stage 3: Assessment .....	4
Stage 4: Project development (procurement option-dependent) .....	5
Procurement option 1: Direct ownership.....	5
Procurement option 2: Community solar.....	6
Procurement option 3: Solar leasing and power purchase agreement (PPA) .....	7
Procurement option 4: Solar co-op PPA.....	8
Procurement option 5: No solar .....	8
Stage 5: Review & decision.....	9
Stage 6: Implementation .....	9
Stage 7: Follow-up .....	10

#### List of Tables

Table G-1: Description of Stage 1, “Capacity building.” .....	2
Table G-2: Description of Stage 2, “Outreach and identification.” .....	3
Table G-3: Description of Stage 3, “Assessment.” .....	4
Table G-4: Description of Stage 4, Procurement Option 1: “Direct ownership.” .....	5
Table G-5: Description of Stage 4, Procurement Option 2: “Community solar.” .....	6
Table G-6: Description of Stage 4, Procurement Option 3: “Solar leasing and power purchase agreement (PPA).” .....	7
Table G-7: Description of Stage 4, Procurement Option 4: “Solar co-op PPA.” .....	8
Table G-8: Description of Stage 4, Procurement Option 5: “No solar.” .....	8
Table G-9: Description of Stage 5, “Review and decision.” .....	9
Table G-10: Description of Stage 6, “Implementation.” .....	9
Table G-11: Description of Stage 7, “Follow-up.” .....	10

## Appendix G: Solar Technical Assistance Process

### ADVANCING SMALL BUSINESS SOLAR EQUITY

#### Overview

The “Solar Technical Assistance Process” is a step-by-step outline of the Advancing Small Business Solar Equity team’s proposed Solar Hub model. It includes program participants’ roles, key decision points, and tools needed to guide a small business through the procurement process for solar.

The technical assistance process involves seven stages:

- 1. Capacity building:** Prior to conducting any outreach, a community-based organization (CBO) must get oriented and trained on the process of providing technical assistance on solar for small businesses.
- 2. Outreach and identification:** Once a CBO is prepared to provide solar technical assistance, it can begin developing and enacting an outreach strategy.
- 3. Assessment:** When an interested business is identified, the CBO would meet with the business and conduct an on-site assessment before moving forward with further exploration of solar.
- 4. Project development:** Once a solar procurement option is determined, the CBO would begin helping the business receive and vet bids for solar installations. After these steps, the business should be able to determine which bid, if any, they choose to move forward with.
- 5. Review and decision:** Once a winning bidder has been selected by the business, the CBO would assist them in a final review process to ensure they are ready to proceed.
- 6. Implementation:** A signed contract leads to implementation, to be monitored by the business.
- 7. Follow-up:** Once the project is completed, the CBO will follow up with the business to ensure that everything is working well and capture any lessons for future projects.

The tables below provide much greater detail in each of these steps. If not specifically identified as coming from another source, the tools and resources referenced in the “Relevant resource or tool” column are items that are identified for future creation in “Section 4.2: Desired Implementation Resources” in the main body of this report. These resources have not yet been created by the Advancing Small Business Solar Equity team.

## Appendix G: Solar Technical Assistance Process

### ADVANCING SMALL BUSINESS SOLAR EQUITY

Table G-1: Description of Stage 1, “Capacity building.”

<b>Stage 1: Capacity building</b>			
<b>Description:</b>	The preparation among the CBO and partners to engage and support small businesses in installing solar.		
<b>Goal:</b>	CBO prepared to begin outreach.		
<b>Step</b>	<b>Role of CBO</b>	<b>Role of small business</b>	<b>Relevant resource or tool</b>
<b>1. Partnership development</b>	Build relationships with solar partners	N/A	
	Agree on shared project principles	N/A	Project principles (“Section 1.3: Principles”)
	Determine funding sources for CBO to support solar technical assistance	N/A	
<b>2. Team building</b>	Choose staff to lead solar outreach and support for small businesses	N/A	
<b>3. Training and education</b>	Participate in training to learn technical assistance skills	N/A	Training template (“Appendix H: Template for Training CBOs on Solar”)

**Appendix G: Solar Technical Assistance Process**  
**ADVANCING SMALL BUSINESS SOLAR EQUITY**

Table G-2: Description of Stage 2, “Outreach and identification.”

<b>Stage 2: Outreach &amp; identification</b>			
<b>Description:</b>	CBO leverages its position as a trusted partner among local businesses to spread the word about solar and recruit businesses to explore if it is a fit for them.		
<b>Goal:</b>	Identify business(es) for assessment.		
<b>Step</b>	<b>Role of CBO</b>	<b>Role of small business</b>	<b>Relevant resource or tool</b>
<b>1. Marketing and community education</b>	Design marketing campaign, with tactics chosen based on best-fit businesses (business types, building types, geographic areas, etc.)		List of incentive options
			Guidance for CBOs to identify solar candidates
	Use marketing channels to promote the opportunity	Learn about solar through a marketing campaign	Public relations package: Message guide & solar fact sheets
		Sign up for follow-up (online form, email, phone call)	
Hold events, meetings, and workshops about solar	Participate in an event		
	Sign up for follow-up		
<b>2. Individualized outreach</b>	Select individuals to contact directly, drawing on relationships, contacts list, and solar potential data		<i>Economic Analysis of Rooftop Solar PV for Twin Cities Small Businesses</i> –Building dataset
			Guidance for CBOs to identify solar candidates
	Reach out to business leads	Receive and respond	
<b>3. Initial conversation</b>	Share high-level info about solar	Learn about solar	Public relations package: Message guide & solar fact sheets
	Explain the process and manage expectations	Ask questions	
	Ask about priorities	Share priorities	
<b>DECISION POINT</b>	Schedule an assessment meeting	Schedule an assessment meeting	

## Appendix G: Solar Technical Assistance Process

### ADVANCING SMALL BUSINESS SOLAR EQUITY

Table G-3: Description of Stage 3, "Assessment."

<b>Stage 3: Assessment</b>			
<b>Description:</b>	Determine if solar is applicable to a specific business by assessing the readiness of the building and the business to take on a new investment and installation of solar on-site.		
<b>Goal:</b>	Select a procurement option to explore for solar.		
<b>Steps:</b>	<b>Role of CBO</b>	<b>Role of small business</b>	<b>Relevant resource or tool</b>
<b>1. Assess business and building readiness</b>	Lead business through the business readiness checklist		Solar readiness checklists
<b>3. Consider solar procurement options</b>	Walk through solar procurement options, highlighting ones that are a fit based on the building and business assessments	Review and discuss possible options	List of solar options + a decision tree
<b>DECISION POINT</b>	Help determine the best-fit procurement option	Select a solar procurement option	

## Appendix G: Solar Technical Assistance Process

### ADVANCING SMALL BUSINESS SOLAR EQUITY

Table G-4: Description of Stage 4, Procurement Option 1: “Direct ownership.”

<b>Stage 4: Project development (procurement option-dependent)</b>			
<b>Procurement option 1: Direct ownership</b>			
<b>Description:</b>	Find solar installers to directly install on the small business, with ownership from day one by the small business.		
<b>Goal:</b>	The small business selects a solar installer or decides not to continue with this procurement option.		
<b>Step</b>	<b>Role of CBO</b>	<b>Role of small business</b>	<b>Relevant resource or tool</b>
<b>1. Collect bids</b>	Provide the Solar Installer List	Select installers to solicit bids from	Solar Installer List (“Appendix I: Solar Installer List”)
	Solicit bids from selected installers	N/A	Bid template for individual business
	Coordinate installer site visits as needed	Host installer site visits	
<b>2. Review incentives</b>	Review the Incentive Options Brief with the business	Learn about incentives	Incentive Options Brief (“Appendix D: Incentive Options Brief”)
	Choose the best-fit incentives		
<b>3. Choose financing</b>	Review financing options, including the following: - Self-finance (cash) - A loan from a bank or a community development finance institution (CDFI) - Commercial property assessed clean energy (C-PACE) program	Select what financial option(s) to explore	List of financing options + a decision tree
	Contact financing providers as needed	Meet with financing providers as needed	
<b>4. Review and compare bid packages</b>	Collect multiple bids with incentives and financing factored in	Review financial implications of bids side by side	Pro forma template for bid comparisons
	Guide discussion on the pros and cons of each proposal and gather feedback	Identify proposals to disqualify	Proposal review guidance + a decision tree
		Identify preferred vendor	
If needed, follow up with vendors for more information			
<b>DECISION POINT</b>	Help the business select a solar installer	Select a solar installer to move forward with	



## Appendix G: Solar Technical Assistance Process

### ADVANCING SMALL BUSINESS SOLAR EQUITY

Table G-5: Description of Stage 4, Procurement Option 2: “Community solar.”

<b>Procurement option 2: Community solar</b>			
<b>Description:</b>	Finding a community solar installation to subscribe to for solar power.		
<b>Goal:</b>	The small business selects a community solar provider or determines not to continue with this procurement option.		
<b>Step</b>	<b>Role of CBO</b>	<b>Role of small business</b>	<b>Relevant resource or tool</b>
<b>1. Collect bids</b>	Share a list of solar developers offering community solar garden subscriptions	Choose solar developers to solicit bids from	List of solar options + a decision tree
	Solicit bids from selected developers		Bid template for individual business
	Coordinate developer site visits as needed	Host developer site visits	
<b>2. Review and compare bid packages</b>	Collect multiple bids together with incentives and financing factored in	Review financial implications of bids, side by side	Pro forma template for bid comparisons
	Guide discussion on the pros and cons of each proposal and get feedback	Identify proposals to disqualify	Proposal review guidance + a decision tree
	If needed, follow up with vendors for more information	Identify a preferred vendor	
<b>DECISION POINT</b>	Help the business select a community solar developer	Select a community solar developer	

## Appendix G: Solar Technical Assistance Process

### ADVANCING SMALL BUSINESS SOLAR EQUITY

Table G-6: Description of Stage 4, Procurement Option 3: “Solar leasing and power purchase agreement (PPA).”

<b>Procurement option 3: Solar leasing and power purchase agreement (PPA)</b>			
<b>Description:</b>	Finding solar developers to install solar on a small business through a power purchase agreement (PPA), initially leasing power and eventually selling the system to the small business.		
<b>Goal:</b>	The small business selects a solar developer or determines not to continue with this procurement option.		
<b>Step</b>	<b>Role of CBO</b>	<b>Role of small business</b>	<b>Relevant resource or tool</b>
<b>1. Collect bids</b>	Share a list of solar developers offering PPAs	Select solar developers to solicit bids from	List of solar options + a decision tree
	Solicit bids from selected developers		Bid template for individual business
	Coordinate developer site visits, as needed	Visit host developer sites	
<b>2. Review and compare bid packages</b>	Collect multiple bids together with incentives and financing factored in	Review financial implications of bids side by side	Pro forma template for bid comparisons
	Guide discussion on the pros and cons of each proposal and get feedback	Identify proposals to disqualify	Proposal review guidance + a decision tree
	If needed, follow up with vendors for more information	Identify a preferred vendor	
<b>DECISION POINT</b>	Help the business select a solar developer	Select a solar developer to move forward with	

## Appendix G: Solar Technical Assistance Process

### ADVANCING SMALL BUSINESS SOLAR EQUITY

Table G-7: Description of Stage 4, Procurement Option 4: “Solar co-op PPA.”

Procurement option 4: Solar co-op PPA			
<b>Description:</b>	Finding a cooperatively-owned business that offers solar PPA leasing models to join.		
<b>Goal:</b>	The small business joins a solar co-op or determines not to continue with this procurement option.		
<b>Step</b>	<b>Role of CBO</b>	<b>Role of small business</b>	<b>Relevant resource or tool</b>
<b>1. Collect bids</b>	Share a list of solar developers offering solar co-op model	Choose solar developers to solicit bids from	List of solar options + a decision tree
	Solicit bids from selected developers		Bid template for individual business
	Coordinate developer site visits, as needed	Host developer site visits	
<b>2. Review and compare bid packages</b>	Collect multiple bids together with incentives and financing factored in	Review financial implications of bids, side by side	Pro forma template for bid comparisons
	Guide discussion on the pros and cons of each proposal and get feedback	Identify proposals to disqualify	Proposal review guidance + a decision tree
		Identify a preferred vendor	
	If needed, follow up with vendors for more information		
<b>DECISION POINT</b>	Help the business select a solar developer	Select a solar developer to move forward with	

Table G-8: Description of Stage 4, Procurement Option 5: “No solar.”

Procurement option 5: No solar			
<b>Description:</b>	The business decides not to move forward with solar.		
<b>Step</b>	<b>Role of CBO</b>	<b>Role of small business</b>	<b>Relevant resource or tool</b>
<b>1. End the solar exploration process</b>	End process here	End process here	

## Appendix G: Solar Technical Assistance Process

### ADVANCING SMALL BUSINESS SOLAR EQUITY

Table G-9: Description of Stage 5, "Review and decision."

Stage 5: Review & decision			
<b>Description:</b>	A final review with the business of the selected source for solar		
<b>Goal:</b>	The business decides to move forward comfortably or decides not to move forward.		
Step	Role of CBO	Role of small business	Relevant resource or tool
<b>1. Draft contract</b>	Ask the selected solar provider to draft a contract		
	Receive and read the draft contract	Receive and read the draft contract	
<b>2. Insurance, legal, and tax review</b>	Go over proposal review guidance with the business to check for concerns on insurance, legal, or tax considerations		Proposal review guidance + a decision tree
	Connect business to technical assistance providers who specialize in insurance, legal, or tax review if needed	Connect with insurance advisors if needed	List of specialized technical assistance providers for insurance, legal, and tax review
<b>DECISION POINT</b>	Help the business make a "go or no-go" decision about signing a contract	Sign the contract	

Table G-10: Description of Stage 6, "Implementation."

Stage 6: Implementation			
<b>Description:</b>	Solar gets installed and connected to the grid.		
<b>Goal:</b>	Solar is installed successfully.		
Step	Role of CBO	Role of small business	Relevant resource or tool
<b>1. Installation</b>	Check in on solar installation timelines and progress		
<b>2. Interconnection</b>	Check in with the solar installer/developer on interconnection timelines and progress		
<b>3. System is turned on</b>			

## Appendix G: Solar Technical Assistance Process

### ADVANCING SMALL BUSINESS SOLAR EQUITY

Table G-11: Description of Stage 7, “Follow-up.”

<b>Stage 7: Follow-up</b>			
<b>Description:</b>	Learn from each solar installation experience so that more businesses can participate successfully and avoid pitfalls.		
<b>Goal:</b>	Feed into a positive feedback loop that leads to more successful solar installations in the community.		
<b>Step</b>	<b>Role of CBO</b>	<b>Role of small business</b>	<b>Relevant resource or tool</b>
<b>1. Gather feedback</b>	Conversation with the business 1-3 months after project completion	Give feedback on solar installation	
	Capture feedback about installers and other partners to guide future program decisions	N/A	
<b>2. Gather stories</b>	Request and capture photos and videos	Consent to photos and videos	
	Request and capture testimonials	Provide testimonials	
<b>3. Tax</b>	Provide the business with solar guidance for tax filing	File taxes	
	If the business used a bridge loan tied to tax filing, remind them about the upcoming bridge loan payment	Bridge loan repayment, in some cases	
<b>4. Legal</b>	Remind business about ownership transfer (PPA only)	Transfer ownership (PPA only)	
<b>5. Reporting</b>	Capture outcomes from individual projects and aggregate them for grant reporting and future project development		