# **Community Solar Software and Services**

A Primer for Developers and Owners, Subscriber Organizations, and Stakeholders

Prepared for the Solar Energy Technologies Office (SETO) Office of Energy Efficiency and Renewable Energy (EERE) U.S. Department of Energy

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# **Abstract**

Today, the vast majority of community solar developers, owners, asset managers, and stakeholders use specialized software tools to support subscriber enrollment, verification, billing, and data-protection, as well as solar asset tracking, analysis, and reporting. Most of these software toolkits are hosted online (cloud-based) and are referred to as software as a service (SaaS) platforms, or simply platforms. Such platforms hold all the data related to a community solar project or portfolio, and (within limits regarding sensitive information) allow different users to directly access and interact on parts of the platform that are relevant to their needs. Some platform providers also offer high-touch support for platform users.

Online platforms have become the face of community solar—the first resource that many prospective community solar subscribers will find and the place where most interactions among community solar developers, business partners, subscribers, and stakeholders occur. The sector has grown in less than a decade from a short list of software and service innovators to a burgeoning array of SaaS providers, working across nearly two dozen state community solar markets. Section 1 of this primer offers an overview of the market, roughly dividing the landscape into major types of community solar platform providers. They range from providers that are tied to specific developers, to providers that showcase other developers' projects while offering back-office and customer-facing services, to providers that focus on greater degrees of customization, culminating in white label¹ products or platforms built from scratch. Across all categories, providers adapt products and services to meet state policy needs, and many have options to meet various price points. Section 2 of this primer describes different types of platform users and their perspectives, and Section 3 adds definition to core and optional platform functions. Readers who are not familiar with community solar terminology may prefer to scan those latter sections before diving into Section 1.

This primer aims to help new developers and solar asset holders (defined as project owners or portfolio managers) in the community solar sector to engage confidently with platform providers to find their best match. It also aims to promote discussion among developers, policy makers, community-based organizations (CBOs), and other local project stakeholders about how to balance concerns for social equity and energy justice with investors' and developers' needs for efficient business systems, typified by these SaaS platforms. Ultimately, the success of community solar depends on achieving market development at speed and scale, while also assuring that the market is built on a foundation of authentic relationships within the communities it serves.

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<sup>&</sup>lt;sup>1</sup> A "white label" product refers to a platform provider that offer full customization and rebranding

# Introduction

According to the <u>National Renewable Energy Lab</u> (NREL), more than 6 GW of community solar had been installed across 44 states and the District of Columbia by December 2022. Twenty-two states, plus the District of Columbia, have sanctioned community solar policies and programs. Despite supply chain challenges across the solar industry, community solar capacity is poised for dramatic growth. The U.S. DOE <u>National Community Solar Partnership</u> (NCSP) target is to enable community solar to serve the equivalent of five million households by 2025 and create \$1 billion in energy savings for subscribers.

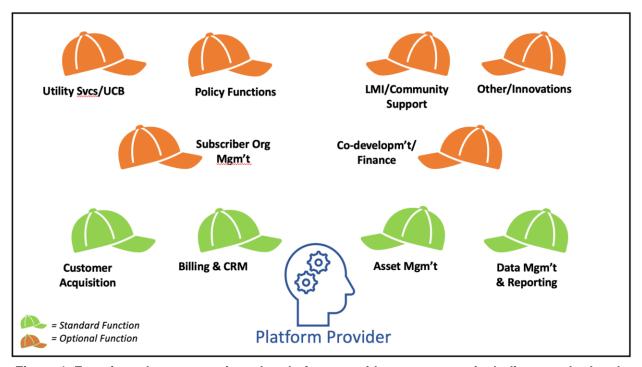
Accelerated market growth has increased the scale and complexity of community solar policies and portfolios. This in turn has increased requirements for data-driven processes, analytics, and reporting. Commercial solar developers and community stakeholders may be surprised by the extent to which these requirements differentiate community solar from the conventional commercial solar sector, even when individual projects are similarly sized. Those with previous experience in commercial solar usually come into the community solar sector with businessmanagement skills and standard spreadsheet tools; they quickly learn that they cannot manage community solar business functions without a much more sophisticated toolkit.

Based on interviews for this report, the vast majority of community solar developers and stakeholders today use specialized software and services to support subscriber enrollment, verification, billing, and data-protection needs, as well as needs for solar asset tracking, analysis, and policy compliance. Most of these software toolkits are online (cloud-based) and are referred to as software as a service (SaaS) platforms, or simply platforms. Such platforms hold all the data and software tools related to a community solar project or portfolio, and (within limits regarding sensitive information) different users can directly access and interact on parts of the platform that are relevant to their needs. Some providers also offer high-touch services and expertise. Figure 1 summarizes the variety of functions that these platforms provide, including core functions that are addressed to some extent by nearly all providers and the optional functions that serve more specific client needs.

For community stakeholders, the transition to working with solar developers and business systems that are focused on profitability and scale may present unique challenges. This primer emphasizes the importance of dialogue among developers, policy makers, community-based organizations (CBOs), and other community solar project stakeholders about how to balance business and grassroots priorities. The opportunities for collaboration are ripe.

New community solar platforms are emerging regularly; others are revising their business plans, and the growing universe of platform providers is highly competitive. Most platform providers offer limited product details on their websites and few publicize their pricing. Clearly, potential clients and stakeholders could benefit from a first-cut overview of platform terms, functions, and service options. This primer provides that overview. A *Checklist for Needs Assessment* is also included at the end of this primer. It lays out a process to help potential platform clients to narrow their choices and engage confidently with candidates before requesting bids for specific

tools and services or for a complete SaaS package. There is no single best way for every community solar developer or subscriber organization to approach marketing, customer acquisition, continuing customer relationship management (CRM), billing, performance analysis, reporting, or other tasks, but success often depends on finding expert and compatible partners including, in the community solar sector, a compatible platform provider.



**Figure 1.** Functions that community solar platform providers may serve, including standard and **optional functions.** The wide variety among providers is due to the combinations of functions they serve, and to their approaches to customization for individual clients. Functions are defined and covered in depth in Section 3. Platform Functions."

To develop this primer, the authors completed a literature review of state community solar policies and implementation tools and interviewed more than a dozen platform software and service providers. These included market leaders, niche competitors, and experts in generic CRM platform customization. The authors also included perspectives of state program staff and solar developers gathered through interviews. While this research is robust, readers are encouraged to review the latest developments in the field and to consult with legal counsel before making business decisions.

Throughout this primer, all references to specific providers of community solar platform software, tools, and services are not endorsements or recommendations, but are only illustrative examples of types of organizations that work in this sector. Readers should explore all options, including companies that are not cited here, before choosing a provider to meet their community solar platform-related needs.

# 1. Platform Providers

When community solar emerged, roughly between 2006 and 2009, project development typically relied on local utility ownership of the solar project or ownership by a third-party developer working under a utility power purchase agreement (PPA). Third-party developers that helped pioneer community solar saw that they needed to manage their solar assets efficiently and support their utility partners needs for subscriber enrollment, billing, and reporting services. Thus, the first community solar platforms were born.

Utilities still host voluntary community solar programs in many states, but where mandated statewide community solar programs exist today, the relationships among utilities, solar developers, subscribers, and other stakeholders are narrowly defined. Typically, project developers and owners may engage directly with community partners and subscribers themselves. In most cases, they use a SaaS platform—under their own exclusive brand name or acquired by contracting with a branded platform provider—to support customer-facing engagement and to perform a wide range of community solar program functions. Those functions are briefly described in the Overview section above (see Figure 1). They are explained here in the context of different kinds of platform providers. In Section 3, Platform Functions, they are discussed again from broader client and stakeholder perspectives

Who are the companies that provide these platforms and services? While many platform providers are still defining or redefining their brands as the community solar sector evolves, their platforms typically fall into four broad categories:

- 1. *Platforms that are identified exclusively with singular solar companies* that develop projects or buy existing solar assets to build their full-service community solar brands.
- Platforms that serve multiple developers and asset holders, providing a range of tools
  and services and sell these à la carte or as turnkey packages for subscriber organization
  management. This category includes subsets of platforms that spotlight particular kinds of
  expertise or marketing strategies.
- 3. Platforms that are available for extensive customization or rebranding, as "white label" products for independent developers and asset holders.
- 4. Templates provided by generic CRM and data management companies to help clients create community solar platforms from scratch.

Later sections of this primer discuss how a developer or asset holder can identify providers most likely to meet their needs. That discussion pays special attention to the needs of new developers in the community solar sector and the needs of CBOs who wish to engage alongside their development partners to achieve local project goals.

# 1.1 Platforms Identified Exclusively with Singular Solar Companies

Some community solar platforms are identified with single, highly integrated solar company's brand. For example, <a href="SunShare">SunShare</a>—which was the first community solar developer to reach 100 MW in solar assets—seeks landowners and investors, but it does not seek to work with independent developers or asset holders. It continues to develop, market, and maintain its own community solar projects. Other highly integrated community solar companies focus on their own projects but sometimes will acquire another developer's' projects or entire solar project portfolios in community solar markets. <a href="Nexamp">Nexamp</a>, which is one of the largest integrated community solar companies in the U.S., is among these. Some independent developers and financiers—or developers who prefer to specialize in engineering, procurement, and construction (EPC) work—may be happy to sell their projects, so they can continue to build and turn over solar projects, without need of specialized skills and services in community solar.

Other highly integrated community solar companies have begun to welcome independent developers to contract with them for turnkey platform services or to purchase their software tools and services à la carte. Examples include <a href="Pivot Energy">Pivot Energy</a>. (Pivot's SunCentral platform is also discussed under Section 1.3, Companies That Offer Extensive Customization.) The shift from exclusively serving projects that a vertically integrated company has developed and owns to buying or serving projects that other developers built suggests a trend toward more partnership-based platform strategies. Host companies say they are interested in optimizing their expertise and investments in their platforms, and sometimes they cite a desire to grow the community solar sector nationwide.

## 1.2 Platforms That Host Multiple Developers and Asset Holders

Many community solar platform and service providers do not aim to build or own solar projects. Instead, they focus on hosting independent developers and asset holders (project owners or portfolio managers). Most of these companies believe that providing cloud-based tools and services for community solar is a specialized business in itself; they prefer to work in partnership with developers and asset holders. These companies see value in their brand-name recognition, so they offer only limited customization to platform graphics, CRM, and billing functions. Community-focused marketing and other services, such as data analytics and reporting, may be extensive. Often a platform provider will spotlight particular interests and strengths to appeal to a compatible subset of clients. Examples from three subsets of platforms in this broad category of providers are discussed briefly below.

#### 1.2.1 Subset: Platforms That Spotlight Data and Analytic Services

Some platform providers spotlight their ability to apply extensive utility- and customer-data resources, often using proprietary analytic tools. For example, Arcadia, which gained an early

reputation promoting voluntary green power (renewable energy credits), has grown into a \$1.5 billion company according to the Wall Street Journal. Arcadia's suite of analytic tools, called Arc, supports business customers, including corporations with environmental and social governance (ESG) goals and utility clients, as well as other community solar platform providers that may contract to use Arc resources and tools. In particular, Arc's database of customer-specific utility billing information is used to help streamline community solar subscriber acquisition and verification. Arcadia also applies Arc data and analytic tools to its own branded, full-service community solar platform.

Other platform providers that emphasize data management and analytic services include <a href="PowerMarket">PowerMarket</a> and <a href="Community Solar Platform">Community Solar Platform</a> (CSP). PowerMarket was launched through a business incubator at New York University to promote energy data management and analytics using national Green Button data standards. Today it has a full-service community solar platform and also offers to help clients integrate community solar with other strategies that can help communities achieve 100% renewable energy or net-zero carbon goals. CSP (also discussed in Section 1.2.2, below) invested \$15 million in its platform in 2020 to add data security, analytic, and process automation features. These examples illustrate a growing trend among platform providers toward greater reliance on data management and analytics, whether to serve project subscribers more efficiently or to integrate community solar with other clean energy options.

# 1.2.2 Subset: Platforms That Spotlight Community Partners

While data analytics and automation are on the rise, so is an interest in partnerships with local CBOs and stakeholders. A few out of many possible examples are provided here.

Solstice Power Technologies is a branded platform serving developers that wish to establish a trusted community presence, including online and local outreach to low- and moderate-income (LMI) households. The Solstice platform is relatively similar in appearance to other platforms, using a mapping tool that allows potential customers to zero in on available solar projects and to initiate a subscription. But the provider also offers its clients an option to add a customized page for community-based marketing, including access to ambassadors who may be recruited from the local subscriber base. Solstice created its own alternative credit-check, called EnergyScore, which sparked interest across the community solar sector in improving market research and sensitivity to LMI households' energy-related spending habits and needs. Solstice also offers policy support for developers who are unfamiliar with processes that require LMI stakeholder involvement.

Neighborhood Sun serves community solar developers and asset holders, with an emphasis on engaging CBOs and developing community partnerships. It has worked to expand community solar access across LMI households, reporting that in 2022, almost a quarter of the energy savings generated by Neighborhood Sun affiliated projects went to subscribers in LMI households. With the intention of speeding the growth of community solar nationwide, Neighborhood Sun also offers its SunEngine platform to independent community solar

developers for customization and rebranding. See more in the discussion of platform customization in Section 1.3 below.

Community Solar Platform (CSP) has branded its customer-facing website under the name Roofless Solar, with back-office tools and services for clients including independent developers, asset holders, and an unusual market segment—local utility partners. CSP emphasizes its roots in the Community Energy Collective (CEC), a Colorado-based company that formed in 2010 and created online community solar asset management, CRM, and billing tools initially for electric cooperatives and, eventually, for all kinds of utilities. A group that included former CEC employees completed a partial buy-out of that company in 2020 and attracted investment to launch CSP for state-administered programs and voluntary utility programs alike. Updated features include largely automated analytic and outreach tools, strategies to keep projects fully enrolled, and cybersecurity features.

### 1.3 Companies That Offer Extensive Customization

Platform providers that offer full customization and rebranding, providing what is called "white-label service," are relatively rare. One example is <a href="Neighborhood Sun's SunEngine">Neighborhood Sun's SunEngine</a> platform. Clients can choose between two plans. A basic plan offers customization of subscriber-facing pages and of solar project management and internal or policy-compliance reporting features. It also includes set-up assistance aligned with state policy requirements and a rebranded website address. CRM and billing may be customized to integrate with the client's existing software. A premium option adds "a full spectrum customer engagement strategy," ranging from a rebranded live-chat feature on the website to rebranded outreach and events in communities served.

Some companies that are known for their fully branded platforms are joining this sub-sector. Pivot Energy now offers customization and à la carte services for clients on its SunCentral platform. Pivot leverages expertise from its core business to offer customized subscriber enrollment and CRM, as well as billing, asset management, and reporting to meet specific state-program needs. Regulatory consulting services are also available à la carte. US Solar recently announced an offer to fully customize its Sunscription platform for municipal, business, or CBO partners who want to address local tastes and needs, but the platform still serves only US Solar projects and is not open to independent developers.

### 1.4 Companies That Help Build Platforms on Templates or from Scratch

Some companies have developed services that assist solar developers and project owners in building community solar platforms. The client base for these companies primarily includes community solar providers that develop their own projects; however, in some cases the goal is to have an exclusive branded platform in addition to participating on other platforms. Often, they find assistance from established back-office service providers. One example is <a href="Hansen Technologies">Hansen</a> global provider of software and services to the energy, water, and communications industries. Hansen built out its existing suite of energy asset management and CRM tools to meet community solar needs for clients like <a href="Nautilus Solar">Nautilus Solar</a> and Minnesota-based

<u>Novel Energy Solutions</u>. Hansen also issues free guides and webinars for community solar developers, finance, utility, and policy partners.

An ubiquitous alternative is <u>Salesforce</u>. Salesforce is a global cloud-based software company that integrates marketing, sales, CRM, e-commerce, and billing functions, as well as analytics and application development. It serves many industries. It offers specialized training and support for renewable energy and electric utility companies, and has established a partnership with <u>Accenture</u> to serve the retail energy services sector, including community solar. Salesforce is frequently used for CRM by solar developers because many IT professionals are familiar with it. It is priced based on the number of users that are granted permissions, rather than the common approach among community solar platform providers of charging for services based on solar MW under management or sometimes adding separate charges per customer acquisition. Salesforce has discounts for nonprofit organizations and sometimes for startups. Some proprietary platforms discussed above have incorporated tools from Salesforce or from its competitors, such as <u>Zoho</u> or <u>Insightly</u>.

Examples of community solar platforms built on Salesforce include <u>SharePower</u>, created by <u>Groundswell Community Power</u>. As a nonprofit, Groundswell is relatively unique among community solar companies. It provides subscriber organization management and other services in the District of Columbia, Illinois and other markets, as well as promoting innovations to advance energy justice through a center called Groundswell Labs. Groundswell does not offer its community solar platform for customization but the team has shared its experience with platform development as part of its mission to grown access to community solar nationwide.

Elevate Energy, a nonprofit consulting firm that serves as the community solar program administrator for Illinois, has used Salesforce as its template for the state program platform. Elevate cites the Salesforce template's ability to integrate many functions and allow conditional access to many stakeholders, while maintaining current security standards. Elevate's IT specialist noted that the nonprofit also used Salesforce to support and track other energy efficiency incentive programs that require utility support. This supports the emergence of fully integrated, customer-facing distributed energy resource programs, which might include community solar, energy efficiency, load flexibility, and storage, managed on a single platform. Platform support staff interviewed about their use of templates warn that ease-of-use is a relative term, and it could be time-consuming for inexperienced staff to create a customer-facing tool from scratch or to significantly customize any existing template-based platform.

According to a senior account manager for the CRM template provider <u>Insightly</u>, a small community solar developer should be able to use available CRM templates, so long as they first check on the exact requirements for a given state's community solar program regarding billing criteria and reporting requirements. Extensive tech support is available, but one has to ask the right questions. Insightly and similar companies may have a service package that includes access to live tech support (a consistent account manager, in the case of Insightly) when questions arise. Popular CRM, billing, and management templates will most likely be able to migrate data to a more sophisticated upgraded version or a different platform, if the company

grows into that need. Smaller independent solar developers, asset holders, and subscriber organizations that anticipate users per project in the tens or hundreds—not tens of thousands may find such options useful. However, the time required for platform design, training and retooling should be included in the business plan.

# A Grassroots Cooperative That Challenges Platform Trends

<u>Cooperative Energy Futures</u> (CEF) is a community energy cooperative formed in 2009 in Minneapolis, Minnesota. Its current focus is on serving its members by building, owning, and operating community solar projects. In January 2023 CEF was named a Grand Prize winner in the Department of Energy's <u>Sunny Awards</u> for Equitable Community Solar for one of its local projects.

CEF has identified access to online software and tools as a barrier on the path to community ownership of community solar in low- and moderate-income households and communities of color. In response, it worked with a local IT provider that serves nonprofit organizations to develop a relatively low-cost, customizable platform solution. The CEF platform tracks community solar generation by project and portfolio. It also supports subscriber enrollment, CRM and billing functions, and basic reporting, such as reports that state program administrators require. Platform functions are not completely automated and security is basic. For example, customers upload their utility account information (a practice that many providers consider vulnerable), and if they are not able to pay by automated withdrawal from a bank account (ACH), then they would call CEF to make alternative arrangements. Likewise, utility credit and billing data is generally transferred manually as a .csv file.

According to CEF General Manager Timothy Denherder-Thomas, the platform focuses on the basics and eliminates functions that a community-based entity may not need nor want to pay for. While recognizing that there are some rough edges to the approach, Denherder-Thomas said the platform's limited release in recent months is getting a strong reception from organizations that have a similar mission to that of CEF and wish to customize it. Initially, users are expected to be participants in the <a href="People's Solar Energy Fund">People's Solar Energy Fund</a>, a national cooperative that helps to finance and realize a vision for local energy democracy. If successful, the platform will be available to a wider audience of community-based nonprofits.

#### 1.5 Section Conclusion

This section illustrates the variety of community solar platform providers and the breadth of features available to developers, asset holders, and participating stakeholders in the community

solar sector. Prospective clients and users of these platforms need to know, first, that the community solar sector has a lot of moving parts. It is not advisable to participate in a statewide community solar program—or even to pursue a local, voluntary program for shared solar—without *some form* of specialized software for project tracking, outreach and subscriber care, and billing and payment support. Those who are new to community solar development, investment, or ownership should note that they are entering a significant market, valued by industry in billions of dollars and valued by policymakers in significant benefits to climate, social equity, and reduced energy-cost burdens.

With so many platform providers striving to anticipate the needs of their clients, it is likely that prospective clients (developers and asset holders) do not have to settle for the first provider that comes along; they can shop and find a compatible match. Moreover, they can ask the companies they are considering to tweak tools or services to meet their needs. This is certainly true for the providers that promote platform customization, but also for those branded platform providers that limit customization. Through dialog across the sector, project developers and owners of all kinds contribute to community solar innovation. The sector is trending towards partnership, replacing the tight vertical integration of community solar design, engineering, procurement, construction, software development, asset-management, and customer-facing functions under one roof. Several platform providers that were interviewed for this primer said that they evaluate potential clients, actively looking for partners that want to grow with them.

In subsequent sections, readers will learn about platform user perspectives and the strengths and limitations of specific platform functions. This can help prospective platform clients to engage more confidently with providers. This also may heighten awareness among all stakeholders in the community solar sector about the role that SaaS platforms can play in helping the community solar sector to meet both financial and policy goals.

# 2. User Perspectives

By definition, a community solar platform must hold multiple data sets and serve multiple users. Leading platform providers are quick to point out that their value to their primary clients (solar developers and asset holders) depends on the value that all stakeholders and platform users—from state administrators and regulators down to CBOs and individual customers—see in their platforms. Here we review categories of platform users and their interests.

## 2.1 Developers

New community solar developers often come with experience in the commercial solar market. They are looking for tools and services that dovetail with their existing business processes, while addressing new community solar needs. Upon entering a state program, a developer may need help acquiring subscribers and demonstrating community benefits, just to win a place in the interconnection queue. The developer is typically considered the lead contact for its associated subscriber organization, but in many states the developer may outsource that responsibility to its platform provider. Notably, some community solar developers are focused on just one project, without intending to develop more in the foreseeable future. This type of

developer is a candidate for platform services to minimize their capacity-building needs, while ensuring their project's success. For example, a housing developer, CBO, or electric cooperative may wish to develop a single community solar project, working with an experienced and ready platform partner.

## 2.2 Solar Asset Owners and Asset Managers

These companies are among the primary clients for community solar platforms. By definition, they include developers that continue to own their solar projects beyond completion, as well as financial organizations that purchase or manage multiple solar projects to build solar investment portfolios. Asset owners and managers that have portfolios of solar projects are concerned with overall performance, risk, and growth strategies. They may wish to be less involved in day-to-day operations of a given community solar project, and therefore may engage platform providers to provide full subscription organization management services.

# 2.3 Subscriber Organizations

Broadly defined, a subscriber organization is the organization that manages subscribers for a project. Subscriber organizations typically work with the developer or project owner, along with key players, including CBOs or local government agencies that advocate for a project and may contribute to its success, project contractors, subscribers, and stakeholders. The developer or owner may lead the subscriber organization directly on a day-to-day basis, or it may contract with a platform provider to work on its behalf, managing communications during project planning and development and managing tasks such as subscriber acquisition, CRM and billing services, compliance, and more. Different states define subscriber organizations differently, so it is wise to check state program guidelines. For example, in <a href="New Jersey">New Jersey</a>, this term refers to any entity that acquires original subscribers for a community solar project or acquires replacement subscribers over the lifetime of a project, or manages subscribers for a project. In <a href="Maryland">Maryland</a>, the term refers to the owner of a community solar project, as well as to the organization that acquires and manages subscriptions. In <a href="New Mexico">New Mexico</a>, the subscriber organization may be one of several entities, including developers, finance partners, or CBOs—whichever acts as the point of contact for all the project partners.

# 2.4 Community-based Organizations (CBOs) and Aggregators

The term, community-based organizations (CBOs) covers a broad category of formal and informal organizations that participate in community solar planning and implementation. They typically advocate for a project and may contribute to its success by providing a site, investing directly, or providing non-monetary help, such as aggregating subscribers. In some states, they may lead the subscriber organization for a given project. CBOs are typically nonprofit organizations. Other supportive entities, such as local government agencies, are referred to as aggregators but fulfill many of the same functions as CBOs. They may access some platform functions directly to help their constituents through the subscription process.

#### 2.5 Subscribers

Community solar programs serve different types of subscribers. Often these include general residential customers and those who are income qualified. Where applicable, community solar also may serve businesses or local government entities, often known as anchor customers, because they hold large and reliable shares in a project. Each type of subscriber may find unique services and content on a community solar platform to answer their questions, support their application, inform them during a likely waiting period, provide answers about social and environmental impacts, and meet their billing needs. A subscriber generally sets up a secure account linked to their utility account and method of payment. The summary of subscriber-facing content on a platform website is called a dashboard.

Best practices for platform subscription services can increase accessibility, data access, transparency, and benefits. For example, platforms may allow the subscriber to choose a language preference (English, Spanish, etc.) and may include graphic or animated summaries of solar performance, monthly savings, year-to-date savings, carbon dioxide savings or equivalent "cars off the road," and more. Clear and easy billing information is a top priority. Subscribers' troubleshooting tips are usually easy to find from the subscriber dashboard, enrollment, or billing page, along with a link to chat or live-phone support. A user-friendly interface is one of the most important determinants of community solar success.

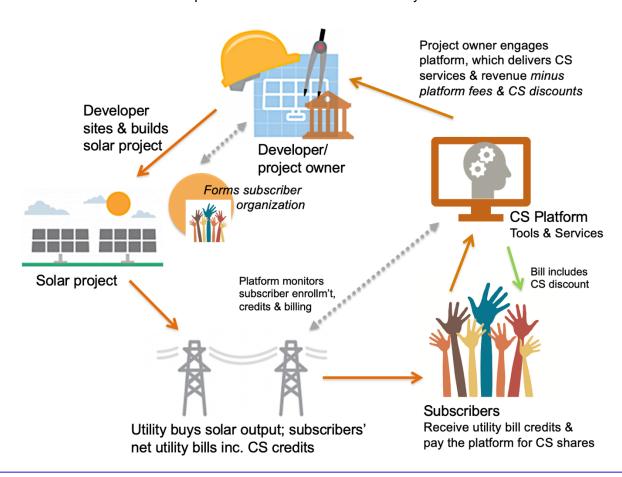


Figure 2. A community solar (CS) platform provider supports the project developer, owner, and all stakeholders in a CS program. Variations in how these relationships work may be affected by state policy. For example, according to this diagram, subscribers pay the utility for electric service beyond the value of their community solar (CS) credits and pay through the platform for their CS subscription. Under a consolidated billing alternative, the utility would provide the singular, net bill.

# 2.6 State Program Administrators

State Program Administrators play a key role in states that have community solar programs under legislative or regulatory guidance. They may be state agencies or organizations under contract to interact with a myriad of stakeholders to ensure the successful implementation of the state's community solar program. The administrator typically hosts a program website that may include platform functions, such as direct links to available projects and subscriber organizations. This creates consistent outreach to supplement individual projects' marketing efforts. Examples of state-wide program administrator websites include Illinois, Rhode Island, and Oregon. The Illinois landing page is relatively detailed, holding information for developers and other Illinois solar program insiders, as well as for prospective community solar subscribers. Homeowners will find detailed information about both rooftop solar and community solar on an inside page; links to special support for low-income households and Spanish speakers are provided. By contrast, the Oregon community solar website is specific to community solar and is primarily customer-facing. Rhode Island's website is similar in that way. It also has an easy link to a virtual mall, from which viewers can read about the location, features, and opportunities to join any participating in-state project. To fulfill their compliance functions, some administrators also offer tools to help streamline LMI subscriber verification and subscriber organization reporting.

### 2.7 Regulators and Policymakers

In states where programs are defined by law or regulation, any platform used would have to be customized to meet state requirements, such as conforming to definitions, meeting consumer protection requirements, and supporting specific billing and reporting rules. Some platform providers offer policy expertise to help navigate these requirements for companies operating in one or more states. The provider's policy experts may even participate on behalf of their clients (as stakeholders) in making policy changes.

#### 2.8 Utilities

This category of users includes utilities that are involved in state-mandated or voluntary community solar programs. Most of those in the voluntary category are electric cooperatives and public power utilities that are exempt from most state-level regulations. Some investor-owned utilities also sponsor voluntary programs, though these are typically subject to regulatory review. Voluntary utility-driven programs may rely on in-house resources, or they may outsource program functions to platform partners.

Under state-mandated programs, utilities are generally limited to certain responsibilities, such as entering community solar subscribers' data, crediting bills for monthly solar generation, and communicating with developers or subscriber organizations on matters such as billing

reconciliation, regulatory reporting, LMI program coordination, and public education. Most utilities adapt their existing CRM and billing systems to address such program requirements.

Nearly all community solar platform providers work to assure that the utility's data and billing are current and correct and meet regulatory and financial reporting needs; a smaller subset uses system automation for these tasks. Increasingly, some offer on-demand reporting and data sharing (within limits) to improve program billing processes. Some platform providers have invested more than others in such functions, including readiness for utility consolidated billing (UCB), a new function discussed in Section 3, below. Currently, only a few companies have the specialized capabilities to focus on utilities' complex IT needs.

# 3. Platform Functions

The following types of features are commonly offered by community solar platforms. Developers and other platform clients and stakeholders may refer back to Figure 1 for an at-a-glance summary of the types of functions and services they may need.

# 3.1 Subscriber Organization Management

When a solar developer or a consortium that includes a project developer, finance partners, CBOs, and other key partners decides to enter the community solar sector, they may contract with a platform provider for subscriber organization management. This includes overseeing project planning and application to a state program, solar asset management, and oversight of key functions (such as customer acquisition, billing, CRM, compliance and reporting, and more). Prospective clients may be looking for this turnkey service or they may only be looking for specific tools and support. For these reasons, the subscriber organization management function—although crucial—is considered an optional rather than standard platform function.

# 3.2 Asset Management

Community solar developers or asset holders are typically the primary clients for platform software and services, and their concerns are appropriately broad. They are concerned with maximizing the value of their investments and fulfilling other business goals. A suitable platform must dovetail with their existing financial and operational systems per project and, if applicable, per portfolio of projects. By tracking solar project performance and simultaneously tracking aggregated subscriber data (e.g., enrollments, waiting lists, churn, and arrears), the asset manager can trigger operational fine-tuning to improve the allocation of shares, operations, and profitability. Billing and reconciling the utility's data is a big part of asset management, too, and so is timely reporting to assure policy compliance. Because it requires the integration of many concerns, community solar asset management resembles subscription organization management, but it is performed specifically with the financial managers' strategic business goals in mind. Specific asset management needs may be determined by:

(1) The number, size, and location of specific projects, whether in one community or across several jurisdictions.

- (2) Whether the developer or owner plans to hold the asset for the long term.
- (3) The profile of subscribers that the project needs to attract, whether that includes local government aggregators, commercial anchor customers, a high percentage of LMI household participants, etc.
- (4) The level of engagement that the developer or owner has with CBOs and other partners.
- (5) The long-term plans of the developer, asset owner and their financial partners.

# 3.3 Customer Acquisition

Policies and project financing arrangements typically dictate a minimum percentage of community solar project capacity that must be subscribed before construction begins. Therefore, customer acquisition (also called enrollment) is one of the main functions of a community solar platform. Providers compete on their ability to attract the right number and types of subscribers to meet client needs. For example, policy may allow one or more large anchor customers, up to a maximum percentage of project capacity. There may be a per-project or program-wide capacity requirement for LMI customers and in some cases subscribers must be enrolled in a specific neighborhood or program offer. The platform provider's policy skills and knowledge of the local market can help achieve customer acquisition goals.

A project can succeed or fail based on how customer-friendly and error-free the online subscription process is. Building trust with potential subscribers is a key role for companies engaging in customer acquisition. The ideal is to have customers "self-subscribe" online, but this requires using uncomplicated language to explain sometimes complicated terms, providing extra illustrations and often a choice of languages, linking to trusted resources, and automated and live chat or telephone support options. Some platform providers offer to engage personal (door-to-door) sales teams, but for the most part that method has been supplanted by so-called omni-channel (multimedia) outreach and relationship marketing. Readers may explore additional research and resources from organizations such as <a href="Energy Allies">Energy Allies</a> (a nonprofit spin-off of Solstice Power Technologies), <a href="Groundswell Labs">Groundswell Labs</a> (related to Groundswell Community Power), <a href="NCSP">NCSP</a>, and other sources to learn how specific types of community solar customers respond to website dashboard features, marketing messages, and media outlets.

Several providers say their investment in subscription automation is one of their greatest competitive advantages. For example, this is especially true regarding the initial review and registration of the prospect's utility account. <a href="Arcadia">Arcadia</a> acquired the largest utility data provider in the world to support its suite of analytic platform tools, called Arc. This provides Arcadia, and other platforms that strike agreements as its business-to-business clients, with secure access to the majority of all utilities' customer accounts. According to Adam Cowie-Haskell, Business Development Coordinator at Solstice Power Technologies, that database and related tools or similar application programming interface (API) products have revolutionized community solar across the market. It was not long ago that subscribers had to submit images of their bills—or even paper copies—for manual processing.

New subscribers are also asked to set up online payment. This may be through a direct debit (ACH) link to a bank account, credit cards, or other options offered through a subscription API,

such as Stripe. Community solar for LMI subscribers may also apply discounts or special offers. Most platforms tap familiar APIs for signature security, credit checks or alternative assessment of credit eligibility, and project analytics.

In the customer acquisition process, automation is ideally balanced with personal service. According to Bruce Stewart, CEO of <u>Perch</u>, "You can't have a human touchpoint for every customer, nor does every customer today want that level of interaction." The key is making sure customers feel that their needs are being met. That includes access to different service options.

Customer acquisition can be challenging specifically because in most cases customers are signing up for a project that is not yet built. Promised savings and environmental benefits may be months off. This increases the need to create a waiting list of additional interested customers in case project capacity comes available. Those who are in the market for platform services should ask about the formation and management of a waiting list. While customer acquisition strategies are improving, it is still more costly to enroll a qualified subscriber and retain them until a project's first billing cycle than it is to provide subsequent CRM.

# 3.4 LMI and Innovative Program Expertise

Nearly every state that has enabling policies for community solar includes provisions to address LMI customer needs. The NCSP Annual Report (March 2023) calls out five meaningful benefits of community solar: LMI solar access, greater household savings, community wealth-building and ownership, resilience and grid benefits, and equitable workforce development and entrepreneurship. This includes efforts to broaden access to solar and address LMI community needs under the Federal Justice40 initiative. Developers and solar asset holders that have been focused on finance, design, and engineering may be unfamiliar with strategies that can incorporate equity into their projects. Community solar platform providers are increasingly ready to help. Services are typically provided under the banner of policy support or subscriber organization management.

#### **Interagency Collaboration on LMI Solutions**

The federal definition for LMI is households at or below 200% of the federal poverty level, or households earning 80% or below of the area median income as defined by the most recent data from the U.S. Census Bureau. The Department of Housing and Urban Development maintains a <u>database</u> of median incomes across the country. Other resources for developers and project owners that previously did not focus on LMI needs include the Clean Energy States Alliance (CESA) Scaling Up Solar <u>website</u>. In addition, the Department of Energy has partnered with the Department of Health and Human Services and the National Association of State Energy Offices to develop the <u>Low-Income Clean Energy Connector</u>, a new platform-based tool that will be available through collaboration with state agencies to help connect income-qualified households to community solar subscriptions. The tool is pilot testing in Illinois, the District of Columbia,

and New Mexico in 2023 for a nationwide rollout in 2024.

Some platform providers have branded tools and strategies specific to the LMI market. Providers also may partner with organizations that demonstrate best practices for this market. <a href="Energy Outreach Colorado">Energy Outreach Colorado</a>, a nonprofit that helped to pioneer LMI target marketing and streamlined verification of LMI eligibility, has worked with Pivot Energy and informed best practices for the SunCentral platform. <a href="Groundswell">Groundswell</a>, which operates the SharePower platform, was a Meaningful Benefit Special Recognition winner in the NCSP <a href="Sunny Awards">Sunny Awards</a> program in 2023, demonstrating ways to collaborate with stakeholders in the District of Columbia.

Gary Skulnik, co-founder of Neighborhood Sun, whose SunShare platform began as a grassroots effort, suggests that the platform team itself should embody the values they wish to represent in the community. Several platform providers hold B Corp (benefits corporation) certification. Yet platform providers with more conventional industry roots are also serving the LMI market, sometimes offering to co-develop special projects or to leverage other investments that local, under-resourced projects need. The list of companies supporting community solar for LMI is growing; it is best to ask any prospective platform provider for their specific capabilities.

# 3.5 Billing and CRM Support

Once a community solar project is up and running, the customer acquisition functions described above should flow seamlessly into billing and CRM services. CRM is covered here with billing because most interactions with subscribers have to do with billing and resolving bill-related questions. Subscribers also may want to know what happens to their subscription if they move, what environmental or social equity impacts their community solar share creates, or how their participation might be affected by events or policy changes that they hear about in the news. Many platforms keep performance data, such as average response time to customer inquiries, time to resolution, and an overall customer satisfaction score, which can be helpful in assessing which platform is the best match for a given developer or asset holder. Strong billing and CRM lead to five-star ratings, referrals, and plain goodwill, which reduces costly customer churn. In mid-2022 Richard Keiser, CEO of Common Energy, told the Norton Rose Fulbright *Project Finance NewsWire* that the percentage of timely collections is also a critical metric, often overlooked in the process of choosing a subscriber organization manager. "We are only asked for customer acquisition costs and customer management costs, but those are irrelevant if you are unable to collect the money," Keiser said.

Billing is a concern for both the platform client and the utility. Most state programs dictate that the subscriber receives two bills. Under this program framework, the utility sends each subscriber a bill that includes all their typical monthly charges, and it lists a credit for the value of solar kWh generated by the subscriber's solar share. The community solar provider sends a second bill, charging the subscriber for the value of solar generated under their subscription in that month, minus a discount or agreed-upon credit that represents solar savings. Typically, the

community solar discount is 10%, but it may be 20% or more, depending upon policy guidelines, incentives, and the provider's competitive offer.

A simple innovation that many platform providers offer puts the subscriber organization or local project logo on net bills presented to their subscribers. They may even include brief news notes. This reinforces the values that subscribers share, and it supports customer retention. The platform's logo may remain—not just to promote its brand, but as a link for further customer care.

Platform providers perform a critical function in setting up the billing and payment system. They need to understand utility billing cycles and policies, verify customer eligibility and start dates, and track other process changes. In rectifying bills, they must ask, Were the correct number of credits applied to each customer? Are they timely? Are customer accounts otherwise up to date? That matters if, for example, a customer moves, drops off, or changes their share in the program. Keeping up with the answers to such questions can be largely automated and result in significant savings in staff time and avoided errors. The differences among platforms regarding billing may seem esoteric, but they are important. According to Bart Rupert, Marketing Director of CSP, his company's experience in working on utility-led programs gave them a keen understanding of how utility billing works and the cost of human errors. "Software that automates for a precise outcome will deliver precise results," he said. Several platforms have invested heavily in billing system automation. It is wise to ask about their performance and when or if personalized staff expertise is also applied.

Utility consolidated billing (UCB) describes an important, if somewhat controversial, innovation in community solar business practices. Several states are testing changes from the dual billing norm to a system where the utility "consolidates" both the value of solar credits and the net charges (including a solar discount) from the community solar provider on one otherwise standard utility bill. UCB has repercussions for platform providers, utilities, and nearly every stakeholder in the sector. Under the dual billing system, the utility "owns" the customer relationship for the solar credits, but the community solar provider owns the customer relationship for enrollment, billing, and customer care. A bill for the subscription is delivered separately through the provider's platform with a reminder by email or text, and it is payable online. Under UCB, the subscribers' solar credits and subscription costs are both shown on one utility bill, along with the net balance due, to be paid through the utility. The National Association of State Energy Officials (NASEO) published a Utility Consolidated Billing Review in mid-2023, tracking UCB policy developments in seven states and assessing the pros and cons of this emergent billing structure. States at the forefront of developing UCB policies include New York, Illinois, Oregon, Virginia, Maryland, New Jersey, and Pennsylvania.

UCB makes it easier for customers to understand the full cost of their energy bill by showing all costs in one place. Solar developers or asset holders, working through their platform providers, would pay the utility a small percentage of the amount collected from subscribers in order to cover UCB administration fees—from 0% to about 3.5%, according to Tom Matzzie, CEO of Clean Choice Energy, as reported in the June 2022 Norton Rose Fulbright <u>Project Finance Newsletter</u>. The platform provider still must make sure that the utility is logging solar credits on

time and forwarding payments for the solar generation associated with each share. The platform provider might also be concerned that the utility should negotiate a fair deal if customers are delinquent in paying the bill. State regulators are in various stages of resolving these problems.

As this practice takes hold, platform providers will have to be creative to sustain community solar brand recognition and differentiation among customers' choices. For solar asset holders and subscription organizations in states where UCB is expected, it is wise to find out how a given platform system plans to make the switch.

Looking ahead, it may be important for community solar in some states to account for the value of solar-plus-storage projects and solar plus energy efficiency or weatherization. Platform providers have not yet differentiated based on this prospect, but developers and stakeholders that are interested in optimizing integrated project value should ask how a given platform provider would address this trend at scale. Massachusetts broke ground in this area, and programs in other states are following. California's community solar program, expected to roll out in 2024, will use an avoided cost calculator that takes technology and market dynamics into account. Many CBO partners also want to see marketing and analytics that incorporate multiple bill-reduction strategies, from solar plus storage to solar plus load management or energy efficiency incentives. Their goal is to reduce the energy burden for eligible households.

## 3.6 Data Management, Analysis, and Reporting

Data management underlies every community solar platform function, from tracking project or portfolio costs and financial performance, to subscriber enrollment, retention, and billing, to reporting impacts (per subscriber and in aggregate) and providing analysis for continuous improvement. The SaaS platform itself is defined by its ability to give different users appropriate—but only appropriate—access to a large body of data. This is sometimes referred to as siloed access or permissions. The data management and security capabilities that a good community solar platform provides have transformed the community solar sector and allowed it to scale. As a result, cloud-based platform tools have almost entirely supplanted the use of manual data management tools, such as common spreadsheets.

Data security is perhaps the greatest driver behind this trend. Data security means protecting digital data from destructive forces and from the unwanted actions of unauthorized users, such as a cyberattack or data theft. A review of standards and protocols for data security that different platform providers use may be dizzying, especially for developers and stakeholders that are new to community solar. Some tips for evaluating them include:

- Review the CESA <u>Guide to Consumer Protection for Community Solar</u>. It provides a basic overview of relevant issues and lists federal and state agencies and laws that may affect community solar projects.
- Review state community solar program guidelines. Most states outline their expectations for protecting subscribers' utility billing data, completing credit checks, processing bills, maintaining related data, and managing even more project-specific data.

- Be sure financial asset management, analysis, and reporting meets stringent standards, and that the platform provider is aligned with project finance partners.
- Ask prospective platform providers if they have achieved any state- or industry-sponsored certifications for data security and ask about measures to comply with standards and best practices, such as security audits and testing.
- Review third-party tools, such as Salesforce, AWS, Stripe, Experian, DocuSign, etc. that
  may be incorporated into a community solar platform to be sure they protect security. Less
  well-known tools may "pass the test," but it is important to verify their credibility.
- Ask for an online tour of every platform considered. Ask about how different user permissions are assigned and how each platform balances security requirements against ease of use.

Each utility partner may have specific requirements for the transfer, sharing, and management of subscriber data. Widely available platforms can meet these requirements and sometimes work closely with utilities where process improvements are needed. Notably, companies that allow full customization and rebranding, as well as specialized template services, may offer data transfer and management support as an additional service. Developers that choose to build a community solar platform on a relatively unspecialized template may require expert IT support to verify cybersecurity coverage.

The analysis and reporting capabilities of different platform providers may be subdivided between analysis and reports for subscribers and stakeholders, versus analysis and internal reporting for state programs, developers, and asset holders. Internal reports include monthly and project-life generation, including forecasted versus actual performance; similar reports on financials (monthly, historic, and projected revenue and expenses, highlighting specific performance drivers like churn, collections, policy changes, or productive sales initiatives); and reports on regulatory compliance, ESG metrics, etc. Providers' analytic and reporting capabilities are discussed at a high level under Asset Management functions, above. Detailed capabilities may be requested from each platform provider through a contact-form request.

Subscriber- and stakeholder-facing analysis and reporting typically feeds into higher-level asset performance reporting. In addition, this subset of functions supports customer acquisition, CRM, and community-engagement goals. For example, reporting to subscribers on monthly and lifetime bill savings is a strong driver for customer retention. Many customers and CBOs want to see environmental impact reports, including reductions of carbon dioxide emissions and reductions of specific pollutants. Municipalities, CBOs, and other marketing partners want to see summaries of overall project performance to judge whether their own outreach is working. Platforms may include reporting on-demand, supporting infographics, and more.

# 3.6 Policy Support

Community solar evolved in a policy environment and the sector continues to be affected by policy at every level: federal, state, and local. Developers may have in-house legal staff but lack specific knowledge of state and local community solar requirements, utility policies, or emerging issues and incentives. In such cases, they could benefit from additional expertise. Most leading

community solar platform providers offer such expertise, either à la carte or more often as a subscriber organization management function. In some cases, they also offer proactive engagement in legislative and regulatory processes and share information that clients will find useful. This is especially true in states where community solar programs are emerging but not yet active. For example, <a href="Perch">Perch</a> regularly posts policy news and unpacks complicated state development on its public platform pages. Other platform providers interpret policy information for partner CBOs and subscription ambassadors (i.e., satisfied customers that receive outreach training and incentives) to keep subscribers as well as new prospects informed and ready.

According to Karla Loeb, Arcadia's head of Government Affairs, the community solar sector is at a stage in its evolution when knowledge of case studies and emerging trends is important. Policy support requires familiarity with different state and local programs, not only to assure that clients can meet current requirements, but also to affect next-stage policy solutions.

Formal or informal industry networks can help support policy and market questions. For example, the <u>Solar Energy Industries Association</u> tracks solar policy developments nationwide. Another trade group, the <u>Coalition for Community Solar Access</u>, serves members with a specific focus on advancing the community solar sector. Energy-focused media and state solar advocacy and trade groups also may be resources for advancing community solar solutions.

# **Prepare to Talk Pricing**

Pricing for community solar platform tools and services is not transparent, and that can be frustrating for prospective clients. Providers reason that most prospective clients will need some customized services—even if they are not looking for a white-label or custom-built platform. They also say that changing market conditions undermine set package pricing. Some platform providers require a non-disclosure agreement before they will provide a tour of their software and answer detailed questions. Prospects can usually get a peek at the platform by finding a customer in an active market, but it is recommended to use the contact form on the provider's business website to get the answers you need. Check with state program administrators or stakeholder groups to find even more providers that are not included in this primer.

It may be helpful to check pricing for CRM template providers such as <u>Salesforce</u> or its direct competitors early in the search. These generic CRM providers are relatively transparent in their pricing, and that can serve as a benchmark for comparison purposes. Their pricing is usually figured on the number of permissioned users, though sometimes with discounts for nonprofits or start-ups, and often with options for specialized features.

Some community solar platforms price by the number of users but have separate charges for customer acquisition (the most costly part of the service cycle) compared to CRM and billing. Some platforms that wish to appeal to industry partners will simply charge by solar MW under asset management, with additional charges for specialized services. Neighborhood Sun (SunEngine) is one of the few providers that readily offers a

<u>preview</u> of at least two service packages. These include Basic and Premium, with the latter focused on delivering a full-service engagement strategy, including automated and live, in-person support. Refer to the Checklist at the conclusion of this primer for help assessing platform needs and forming questions to help narrow down the list of prospective platforms, talk pricing, and find a compatible match.

#### 3.7 Section Conclusion

The research on which this primer is based reflects a moment in time within the community solar sector's ongoing evolution; the details about what community solar platform providers offer may change. Yet their core functions remain focused on customer acquisition, billing, and CRM, plus back-office data management and reporting. Project or portfolio financial asset management is also a core function since solar project owners and project portfolio (asset) managers need to know that their solar generation is being optimized by a full and stable complement of subscribers, comprising the right mix of standard residential, LMI, and (where applicable) commercial anchor customers. Notably, some providers are beginning to specialize in developing advanced databases and analytic tools, while other providers may outsource to obtain the advanced data and analytic tools they need.

The description of a platform function as a "core function" does not mean it is standardized. For example, different providers have different approaches to subscriber acquisition—whether they use so-called omni-channel (multi-media) marketing backed by automated enrollment features, or offer online chats or phone call-backs, or recruit local sales ambassadors from among their existing customers. Billing—also a core function—differs among platforms, based on policy and administrative needs, including compatibility with utility systems.

Optional platform functions, such as policy support, UCB, co-development and finance, LMI services, and community outreach support are considered optional because clients may or may not need them. For example, developers that wish to focus on serving LMI households may seek a platform that offers specialized messaging, media placement, credit checks, and billing strategies. Subscriber organization management is also an optional feature—a turnkey service that is attractive to community solar developers and asset holders who would rather outsource day-to-day responsibilities for the planning and implementation of a community solar project. The ability to manage UCB is another example of an optional function, which is useful in some—but not all—markets today.

This primer touches upon the question, "How much is enough when it comes to community solar business automation and analytic capabilities?" Sometimes a solar developer will be engaged to design, finance, and build a small portfolio of community solar projects or even a single project to serve a local government, nonprofit, or grassroots cooperative's needs. As suggested in Section 1, leaders of such projects may be wary of sophisticated platform functions and features. Yet nearly all community solar projects need software and tools that can be accessed online (via cell phone as well as computer) with the clarity and security that all subscribers deserve. Some financiers, developers, and advocates that are focused on local

wealth-building are creating new SaaS solutions. In addition, some established platform providers are ready to customize their tools and services at a desirable price to meet these needs.

It is unfortunate that platform providers are not, to date, transparent about their pricing. They believe—with some good reason—that clients' needs differ too much to assign simple unit cost. This section has provided some general background information on platform or white-label and template pricing, and it suggests how to contact a suitable range of platform candidates. A decision checklist is included at the conclusion of this primer, outlining a process and questions to support the reader's search for a capable and compatible platform provider.

As previously stated in this primer, all references to specific providers of community solar platform software, tools, and services are not endorsements or recommendations, but are only illustrative examples of types of organizations that offer services. Readers should explore all options, including companies that are not cited here, before choosing a provider to meet their community solar platform-related needs.

# **Checklist:**

Assess Your Needs for Community Solar Software Tools and Services



# 1. Complete prerequisite research.

- Join the <u>National Community Solar Partnership (NCSP)</u>, your connection to valuable networking, technical assistance, resources and support.
- Review <u>policies</u> and regulations that apply to projects in your market. Understand the timeline and risks in markets that may be over-saturated, relative to program caps.
- If your project is not part of a state-sanctioned program, check NCSP and in-state resources to learn about alternative business models that may be open to you.

# 2. Describe your immediate and long-term goals for community solar development and asset ownership.

- Do you plan to focus on the community solar sector, or will other kinds of development continue to take your time and attention?
- Do you plan to work in more than one market? Which states? At what scale?
- Do you foresee needing financing or co-development services from a platform provider?
- Do you foresee working with local partners identified through your own efforts or identified with support from a platform provider?
- Do you have the time and money to invest in developing your own branded platform? Or might you prefer a platform partner to showcase your projects and support your backoffice functions?

 Are your current interests limited to a specific project or partnership with a CBO, local government or a community solar anchor customer? Review the Platform Providers section of the primer for notes on platforms that serve developers with these needs.

## 3. Look for a platform that can support your mission and brand.

- Spend some time gaining first-hand knowledge from community solar stakeholders in your market. They may have encountered platform providers through regulatory proceedings or outreach events. Join in to find platform partners—and friends.
- Consider how optional platform functions can reinforce your brand. For example, if you
  are focused on environmental benefits, look for analytic and reporting functions to help
  deliver your message. If broadening solar access is key, find out if enrollment and
  platform services are multi-lingual and promoted through targeted media. Does the
  platform offer tools to streamline creditworthiness and LMI program eligibility?

# 4. Consider how your current CRM and billing software will dovetail with a given platform's system, or how you will be supported to make the switch.

- If your current operation is relatively simple, ask how to transition to a new platform-based system. If you seek a customizable product or template, what kind of technical support is available? What options are available for training and support?
- Is platform data security compatible with your existing system and growing expectations?
- If utility consolidated billing (UCB) is available in your market, is the provider ready?
- How does the platform verify subscriber eligibility, such as using credit scores or alternative tools that can securely streamline LMI subscriber enrollment?

# 5. Set up meetings to ask specific questions that matter to you.

- What performance metrics can the provider share regarding subscriber enrollments, referrals, churn, automated and high-touch problem resolution, financial performance, billing reconciliation and results, on-time reporting to state administrators, etc.?
- What is the provider's strategy for maintaining subscriber interest until a project is operational?
- Ask if the platform uses third-party CRM tools, such as Salesforce, Stripe, DocuSign, etc., or uses utility-billing and analytic tools from known industry providers. If proprietary or lesser-known tools are used, ask about their validation and competitive advantage.
- How will your brand be featured on appropriate platform pages and supported in the community? Which services are standard, and which are à la carte?
- **6. Get to the bottom line.** The challenges of obtaining and comparing pricing information are discussed in Section 3 of the primer. A few summary notes are provided here.
  - Familiarize yourself with the limited pricing information that is available online for generic CRM tools, such as Salesforce and its competitors, as well as for some white-label community solar platforms. This will help you to engage with several platforms' sales staff, who are generally available only through online contact forms.
  - After the initial conversation, request a free online tour. Tour more than one platform and refer to your notes from your needs assessment using this Checklist.
  - When it is time to request a bid, insist on a format that allows you to compare competitors' proposals. Agree on definitions and ask for pricing based on a common scenario that would meet your most likely needs. Ask for additional pricing information to address likely add-ons or what-if situations.

| • | Be open to bids from several companies. This primer features examples of platform providers to illustrate the range of tools and services available, but it is not all-inclusive of all companies in this dynamic market sector. |
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# **Sources Cited in This Primer**

#### **Websites of Platform Providers Cited**

The providers and organizations listed below were referenced as examples in this paper.

In most cases, the authors also interviewed leadership or staff at these companies. This is not a comprehensive list of all providers currently serving the community solar market. We encourage readers to explore additional options when deciding on a software provider to meet their needs. All websites were accessed and verified in June 2023.

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