

**PALM BEACH COUNTY  
BOARD OF COUNTY COMMISSIONERS**

**AGENDA ITEM SUMMARY**

**Meeting Date:** July 11, 2017

(X) Consent    ( ) Regular  
( ) Ordinance    ( ) Public Hearing

**Department**

**Submitted By:** County Administration  
**Submitted For:** County Administration

**I. EXECUTIVE BRIEF**

**Motion and Title: Staff recommends motion to approve:** Memorandum of Understanding between Palm Beach County (County) and The Solar Foundation, a nonprofit organization, to provide a full-time advisor for six months, at no cost to the County, to help the County and co-host municipalities reduce the soft costs of solar.

**Summary:** Approval of this item enables the County to host an Advisor, under The Solar Foundation's SolSmart program funded by the United States Department of Energy SunShot Initiative, who will work with the County and co-applicants to address solar soft costs (e.g. planning and zoning, permitting, financing, etc.), foster local solar market growth, and obtain SolSmart Community designations. Countywide (RPB)

**Background and Justification:** In keeping with the County's commitment to increasing its climate resilience and reducing its GHG emissions, the County, along with the City of Delray Beach, City of Lake Worth, Town of Lantana, and the City of West Palm Beach, was successful in a joint application to host a SolSmart Advisor who will work with the County and municipalities to address solar soft costs (e.g. planning and zoning, permitting financing, etc.), foster local solar market growth, and individually obtain SolSmart Community designations. SolSmart provides the following benefits:

- National recognition on the SolSmart website, media campaign mentions, etc.
- Sends an "open for business" signal to solar industry, which could increase jobs and provide economic benefits.
- Signifies that the County is committed to reducing GHG emissions.
- An assigned advisor, fully funded by SolSmart, for a period of 6 months to address local and regional renewable energy goals.
- Other than County staff time for review and implementation, there is no cost for certification or maintenance of the designation.

At the conclusion of the process, the County anticipates sharing successes and lessons learned with other Palm Beach County municipalities and regionally, through the Southeast Florida Regional Climate Change Compact. The County, co-host municipalities, look forward to collaborating with the Advisor and subsequent designations as SolSmart Communities.

**Attachments:**

1. Memorandum of Understanding with The Solar Foundation

<b>Recommended by:</b>	<u>Matalie B. Schneider</u>	6-21-17
	Climate Change & Sustainability Coordinator	Date
<b>Approved by:</b>	<u>Nancy L. Beldin</u>	7/7/17
	Deputy County Administrator	Date

## II. FISCAL IMPACT ANALYSIS

### A. Five Year Summary of Fiscal Impact:

Fiscal Years	2017	2018	2019	2020	2021
Capital Expenditures	_____	_____	_____	_____	_____
Operating Costs	_____	_____	_____	_____	_____
External Revenues	_____	_____	_____	_____	_____
Program Income (County)	_____	_____	_____	_____	_____
In-Kind Match (County)	_____	_____	_____	_____	_____
NET FISCAL IMPACT	_____ <sup>*0</sup>	_____	_____	_____	_____

# ADDITIONAL FTE  
POSITIONS (Cumulative) \_\_\_\_\_

Is Item Included in Current Budget? Yes \_\_\_\_\_ No X

Budget Account No.: Fund \_\_\_\_\_ Department \_\_\_\_\_ Unit \_\_\_\_\_ Object: \_\_\_\_\_  
Program \_\_\_\_\_

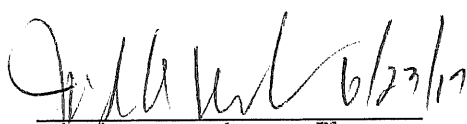
### B. Recommended Sources of Funds/Summary of Fiscal Impact:

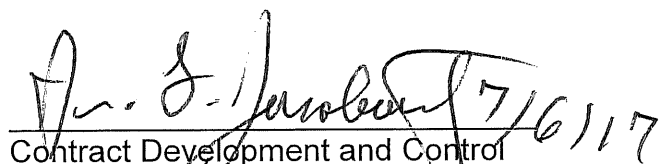
\* No County funds are being used.

### C. Department Fiscal Review:

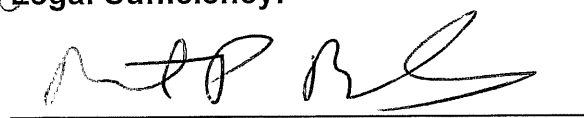
## III. REVIEW COMMENTS

### A. OFMB Fiscal and /or Contract Dev. and Control Comments:

  
OFMB 2/6/22 DA 6/23

  
Contract Development and Control 7/6/17  
6/6/17 GA

### B. Legal Sufficiency:

  
Assistant County Attorney

### C. Other Department Review:

\_\_\_\_\_  
Department Director

## **ATTACHMENT 1**

### **SolSmart Advisor Host Community Memorandum of Understanding Between Palm Beach County and The Solar Foundation**

This Memorandum of Understanding (MOU) sets forth the terms and understanding between The Solar Foundation and Palm Beach County, a Political Subdivision of the State of Florida, by and through its Board of County Commissioners (“Host Community”), to facilitate the work of the SolSmart Advisor assigned to the Host Community and achieve designation under the SolSmart program.

#### **Background**

SolSmart is a national designation program, funded by the U.S. Department of Energy SunShot Initiative, designed to recognize communities that have taken key steps to address local barriers to solar energy and foster the growth of mature local solar markets. The Solar Foundation, serving as the SolSmart Technical Assistance Provider, and its team of national solar and local government experts provides no-cost technical assistance to help communities qualify for SolSmart designation.

The SolSmart program primarily seeks to address “solar soft costs,” or business process or administrative costs that can increase the time and money it takes to install a solar energy system — costs which are then passed on to solar customers. While only certain local government procedures (such as permitting, planning, and zoning) are the source of some soft costs, local governments are in a unique position to reduce soft costs and take action to promote the use of solar locally.

The SolSmart designation program will provide high-profile, national recognition for communities that have made it cheaper and easier for solar customers to invest in solar energy. In addition, achieving designation will send a signal to solar companies that a community is “open for solar business,” attracting new businesses and helping designees share in the economic development benefits attached to the solar industry.

A unique feature of the technical assistance offerings of the SolSmart program are SolSmart Advisors – experienced, temporary staff funded by The Solar Foundation to help communities achieve designation. The primary objective of the SolSmart Advisors program is to provide select communities participating in the SolSmart program with in-depth support for achieving SolSmart designation through engagements lasting up to 26 weeks. Through these engagements, the SolSmart program sees a prime opportunity for Advisors to become part of the next generation of solar market leaders. The roles, responsibilities, and expectations listed below are critical to the attainment of these goals.

### **Roles, Responsibilities, and Expectations**

1. The Solar Foundation will:
  - a. Lead the SolSmart Advisor recruitment effort (if necessary and in collaboration with the Host Community) through an open and competitive process and match candidates with Host Community and/or review and approve or reject SolSmart Advisor nominations from Host Community.
  - b. Provide stipends to support the work of the SolSmart Advisor.
  - c. Provide the SolSmart Advisor with training and educational resources.
  - d. Monitor SolSmart Advisor progress and support other project management activities.
  - e. Provide limited, supplemental technical assistance to the SolSmart Advisor and/or Host Community as needed.
  - f. Connect SolSmart Advisors with existing local networks that can serve as a resource to the SolSmart Advisor.
2. The Host Community will:
  - a. Make every reasonable effort to facilitate and ensure completion of the SolSmart Advisor work plan specified in the Work Plan, composed of “Exhibit 1: Florida SolSmart Advisor Work Plan” attached hereto and incorporated herein, and that the Host Community (or the individual communities on behalf of which the Host Community receives a SolSmart Advisor) will achieve designation under the SolSmart program. The Host Community recognizes that inadequate project progress may result in early termination of the SolSmart Advisor work plan and this MOU.
  - b. Maintain a clear, ongoing commitment to achieving SolSmart designation.
  - c. Assign a project “Sponsor” (e.g., local elected official, local government department head, organization director, etc.) to provide the SolSmart Advisor with reliable access to the staff and decision makers within the community who will select from and ultimately implement the recommendations provided by the SolSmart Advisor.
  - d. Assign a project “Supervisor” to provide regular assistance and guidance to the SolSmart Advisor and to participate in project management and reporting.
  - e. Provide the SolSmart Advisor with adequate work space, equipment, access to Host Community and local government staff and other human resources across all relevant departments and to external stakeholders.
  - f. Allow the work of the SolSmart Advisor, including successes and lessons learned, to be promoted publicly by the SolSmart program.
3. The SolSmart Advisor will:
  - a. Assume primary responsibility in qualifying the Host Community for SolSmart designation and maximizing the programmatic impact of the engagement.



- b. Review and revise as necessary the SolSmart Advisor work plan and ensure steady progress toward work plan objectives, outcomes, and milestones is maintained.
- c. Participate in regular check-in calls, project reporting, and other project management activities.
- d. Coordinate effectively and work professionally with the Supervisor, Sponsor, and internal and external stakeholders.
- e. Identify and fully leverage opportunities to promote the work of the Advisors and Host Community.

#### **Schedule**

Host Community will make every reasonable effort to ensure the schedule(s) and milestones are met according to the Work Plan. Failure to maintain the schedule(s) and/or milestones may result in termination of this MOU. If feasible, Host Community will notify The Solar Foundation in writing within one week of any delays or anticipated delays in performing the Services and explain the reasons for said delays.

#### **Term**

The term of this MOU shall commence on June 26, 2017 and end no later than January 3, 2018.

#### **Termination**

Either party has the right to terminate this MOU without cause with written notice to the other party.

#### **Confidentiality**

Except as necessary to carry out the purposes of this MOU, compelled by applicable law or as authorized in advance, neither Party shall use or disclose any information it received from the other under this MOU which previously has been identified as confidential or exempt from mandatory public disclosure. If such information is subpoenaed through legal process, then the subpoenaed Party will immediately advise the Party that provided the confidential information so that it may evaluate whether to invoke legal process to avoid disclosure at its own expense.

#### **Insurance**

The Solar Foundation agrees to maintain, on a primary basis and at its sole expense, at all times during the life of this contract the following insurance coverages, limits, including endorsements described herein. The requirements contained herein, as well as the Host Community's review or acceptance of insurance maintained by The Solar Foundation is not intended to and shall not in any manner limit or qualify the liabilities or obligations assumed by The Solar Foundation under this MOU. In addition, The Solar Foundation agrees to notify the Host Community of any cancellation, non-renewal or material change taking place during the life of this contract.

**Commercial General Liability** The Solar Foundation agrees to maintain Commercial General Liability at a limit of liability not less than **\$1,000,000** Each Occurrence. Coverage shall not contain any endorsement(s) excluding nor limiting Premises/Operations, Personal Injury, Product/Completed Operations, Contractual Liability, Severability of Interests or Cross Liability. Coverage shall be provided on a primary basis.

**Business Automobile Liability** The Solar Foundation agrees to maintain Business Automobile Liability at a limit of liability not less than **\$1,000,000** Each Occurrence. Coverage shall include liability for Owned, Non-Owned & Hired automobiles. In the event The Solar Foundation does not own automobiles, The Solar Foundation agrees to maintain coverage for Hired & Non-Owned Auto Liability, which may be satisfied by way of endorsement to the Commercial General Liability policy or separate Business Auto Liability policy. Coverage shall be provided on a primary basis

**Worker's Compensation Insurance & Employers Liability** The Solar Foundation agrees to maintain Worker's Compensation Insurance & Employers Liability in accordance with Florida Statute Chapter 440. Coverage shall be provided on a primary basis.

**Additional Insured** The Solar Foundation agrees to endorse the Host Community as an Additional Insured with a CG026 Additional Insured or its equivalent – Designated Person or Organization endorsement to the Commercial General Liability. The additional insured shall read "Palm Beach County Board of County Commissioners, a Political Subdivision of the State of Florida, its Officers, Employees and Agents. Coverage shall be provided on a primary basis

**Waiver of Subrogation** The Solar Foundation agrees by entering into this contract to a Waiver of Subrogation for each required policy herein. When required by the insurer, or should a policy condition not permit The Solar Foundation to enter into a pre-loss agreement to waive subrogation without an endorsement, then The Solar Foundation agrees to notify the insurer and request the policy be endorsed with a Waiver of Transfer of Rights of Recovery Against Others, or its equivalent. This Waiver of Subrogation requirement shall not apply to any policy, which includes a condition specifically prohibiting such an endorsement, or voids coverage should The Solar Foundation enter into such an agreement on a pre-loss basis.

**Certificate(s) of Insurance** The Solar Foundation agrees to provide the Host Community a Certificate(s) of Insurance evidencing that all coverages, limits and endorsements required herein are maintained and in full force and effect. In addition, The Solar Foundation agrees to notify the Host Community of any cancellation, non-renewal or material change taking place during the life of this contract. The Certificate Holder address shall read:

Palm Beach County  
c/o Climate Change and Sustainability, County Administration  
2300 N Jog Rd, 4<sup>th</sup> Floor  
West Palm Beach, FL 33411

**Umbrella or Excess Liability.** The Solar Foundation may satisfy the minimum liability limits required above for Commercial General Liability and Business Auto Liability under an Umbrella or Excess Liability policy. There is no minimum Per Occurrence limit of liability under the Umbrella or Excess Liability; however, the Annual Aggregate limit shall not be less than the highest “Each Occurrence” limit for the Commercial General Liability, and Business Automobile Liability. The Solar Foundation agrees to endorse the Host Community as an “Additional Insured” on the Umbrella or Excess Liability, unless the Certificate of Insurance states the Umbrella or Excess Liability provides coverage on a pure/true “Follow-Form” basis.

**Right to Review** The Host Community reserves the right, but not the obligation, to review and revise any insurance requirement, not limited to limits, coverages and endorsements based on insurance market conditions affecting the availability or affordability of coverage; or changes in the scope of work / specifications affecting the applicability of coverage. Additionally, the reserves the right, but not the obligation, to review and reject any insurance policies failing to meet the criteria stated herein or any insurer providing coverage due to its poor financial condition or failure to operating legally.

#### **Indemnification**

The Solar Foundation shall protect, defend, reimburse, indemnify and hold Host Community, its agents, employees, and elected officers harmless from and against all claims, liabilities, expenses, losses, costs, damages or causes of action of every kind or character, including attorney’s fees and costs, whether at trial or appellate levels or otherwise, arising during and as a result of Solar Foundation’s performance of the terms of this MOU.

#### **Remedies**

This MOU shall be governed by the laws of the State of Florida. Any legal action necessary to enforce this MOU will be held in a court of competent jurisdiction located in Palm Beach County, Florida. No remedy herein conferred upon any party is intended to be exclusive of any other remedy, and each and every such remedy shall be cumulative and shall be in addition to every other remedy given hereunder or now or hereafter existing at law or in equity, by statute or otherwise. No single or partial exercise by any party of any right, power, or remedy hereunder shall preclude any other or further exercise hereof.

No provision of this MOU is intended to, or shall be construed to create any third party beneficiary or to provide any rights to any person or entity not a party to this MOU, including but not limited to any citizen or employees of the Host Community and/or The Solar Foundation.

#### **Independent Contractor**

The Solar Foundation is and shall be in the performance of all work and services and activities under Section 1 of Roles, Responsibilities, and Expectations of this MOU, an Independent

Contractor, and not an employee, agent, or servant of the Host Community. All persons engaged in any of the work or services performed pursuant to this MOU shall at all times and in all places be subject to The Solar Foundation's sole direction, supervision and control. The Solar Foundation shall exercise control over the means and manner in which it and its employees perform the work, and in all respects The Solar Foundation's relationship and the relationship of its employees to the Host Community shall be that of an Independent Contractor and not as employees or agents of the Host Community. The Solar Foundation does not have the power or authority to bind the Host Community in any promise, agreement or representation.

The Host Community is and shall be in the performance of all work and services and activities under Section 2 of Roles, Responsibilities, and Expectations of this MOU, an Independent Contractor, and not an employee, agent, or servant of The Solar Foundation. All persons engaged in any of the work or services performed pursuant to this MOU shall at all times and in all places be subject to Host Community's sole direction, supervision and control. Host Community shall exercise control over the means and manner in which it and its employees perform the work, and in all respects Host Community's relationship and the relationship of its employees to The Solar Foundation shall be that of an Independent Contractor and not as employees or agents of The Solar Foundation. Host Community does not have the power or authority to bind The Solar Foundation in any promise, agreement or representation.

#### **Non-Discrimination**

The Solar Foundation warrants and represents that all of its employees are treated equally during employment without regard to race, color, religion, disability, sex, age, national origin, ancestry, marital status, familial status, sexual orientation, gender identity and expression, or genetic information. The Solar Foundation has submitted to Host Community a copy of its non-discrimination policy, which is consistent with the above sentence, as contained in Resolution R-2014-1421, as amended, or in the alternative, if The Solar Foundation does not have a written non-discrimination policy or one that conforms to the Host Community, it has acknowledged through a signed statement provided to Host Community that The Solar Foundation will conform to Host Community's policy as provided in R-2014-1421, as amended.

#### **Authority to Practice**

The Solar Foundation hereby represents and warrants that it has and will continue to maintain all licenses and approvals required to conduct its business, and that it will at all times conduct its business activities in a reputable manner. Proof of such licenses and approvals shall be submitted to Host Community's representative upon request.

#### **Severability**

If any term or provision of this MOU or the application thereof to any person or circumstances shall, to any extent, be held invalid or unenforceable, the remainder of this MOU or the application

of such terms or provision, to person or circumstances other than those as to which it is held invalid or unenforceable, shall not be affected, and every other term and provision of this MOU shall be deemed valid and enforceable to the extent permitted by law.

**Criminal History Records Check**

If The Solar Foundation’s employees or subcontractors are required to enter a “critical facility,” as identified in Resolution R-2003-1274, The Solar Foundation shall comply with the provisions of Chapter 2, Article IX of the Palm Beach County Code (“Criminal History Records Check” section). The Solar Foundation acknowledges and agrees that all employees and subcontractors who are to enter a “critical facility” will be subject to a fingerprint based criminal history records check. Although Host Community agrees to pay for all applicable FDLE/FBI fees required for criminal history records checks, The Solar Foundation shall be solely responsible for the financial, schedule, and staffing implications associated in complying with this section of the Palm Beach County Code. All work and services and activities performed by The Solar Foundation’s subcontractors will primarily take place at 2300 North Jog Road, 4<sup>th</sup> Floor, West Palm Beach, Florida 33411 (also known as the “Vista Center”), which is not a “critical facility.”

**THE SOLAR FOUNDATION:**

Date: \_\_\_\_\_

By: (signature) \_\_\_\_\_  
Name: Andrea Luecke

Title: President and Executive Director

Address: 1717 Pennsylvania Ave NW, Suite 750  
Washington, DC 20006

ATTEST:  
SHARON R. BOCK  
CLERK & COMPTROLLER

By: \_\_\_\_\_  
Deputy Clerk

PALM BEACH COUNTY, FLORIDA BY ITS  
BOARD OF COUNTY COMMISSIONERS

By: \_\_\_\_\_  
Paulette Burdick, Mayor

APPROVED AS TO TERMS AND  
CONDITIONS

By: \_\_\_\_\_

APPROVED AS TO FORM AND  
LEGAL SUFFICIENCY:

By: \_\_\_\_\_  
County Attorney

# **Delray Beach, FL**

SolSmart Advisor  
Host Community Calculator

SolSmart Advisor Host Community Application



Instructions

- 1) Complete the "Foundational Categories" tab. Add criteria to your Advisor Plan by clicking in the "Addressed in" column and selecting "Advisor Plan." For the criteria that you add to your Advisor Plan, choose which month you will start and complete the action. These actions will appear in the Gantt chart on the "Milestones" tab.
- 2) Complete the "Special Focus Categories" tab. Add criteria to your Advisor Plan by clicking in the "Addressed in" column and selecting "Advisor Plan." For the criteria that you add to your Advisor Plan, choose which month you will start and complete the action. These actions will appear in the Gantt chart on the "Milestones" tab.
- 3) Review the "Summary" tab to ensure that you reach your desired level of designation.
- 4) Review the "Milestones" tab to ensure that the timing of completion is accurate, reflects your intended timeline, and relate to the community's desired level of designation.
- 5) Complete the "Milestones Narrative" to provide more information or clarify any element.

Choose Your Desired Level of Designation

Decide whether your community wishes to pursue Bronze, Silver, or Gold designation. This can be changed at any time.

Silver



Foundational Categories: Permitting and Planing, Zoning, & Development Regulations

Solar Statement

Criteria	Addressed in	Points	Month Started	Month Completed
PR-1: A letter indicating commitment to pursuing SolSmart designation and supporting solar development locally. Statement includes: statement of solar goals/areas of focus, past achievements, commitment to tracking metrics, and a commitment of staff time and resources. (Required)	Points Awarded by Reviewers	Requirement Achieved		

Permitting

Criteria	Addressed in	Points	Month Started	Month Completed
P-1: Create and make available an online checklist detailing the steps of your community's solar permitting process. (Required)	Advisor Plan	Requirement Proposed	1	3
P-2: Provide a streamlined permitting pathway for small solar PV systems with turn-around time of no more than 3 days. (Required for Gold)	N/A	0		
P-3: Distinguish between systems qualifying for streamlined or standard review.	N/A	0		
P-4: Require no more than one application form for a residential rooftop solar PV project.	Advisor Plan	5	1	3
P-5a: Conduct a review of solar permit fees for residential and commercial solar PV.	Advisor Plan	5	1	3
P-5b: Earn additional points: Revise or demonstrate that permit fees reflect national best practices (\$400 or less for residential, and based on cost-recovery for commercial).	Advisor Plan	5	1	4
P-6: Review permitting process for efficiency improvements and reduce processing time to 10 days or less.	Advisor Plan	10	1	4
P-7: Adopt a standard solar PV permit form aligned with best practices (e.g. Solar ABCs).	Advisor Plan	10	1	4
P-8: Train permitting staff on best practices for permitting solar PV and/or solar and storage systems. Training must have occurred within the past five years.	Advisor Plan	10	1	3
P-9: Train fire and safety staff on solar PV. Training must have occurred within the past five years.	N/A	0		
P-10: Develop a regular communication schedule to solicit recommendations from the solar installer community regarding procedural changes.	N/A	0		
P-11: Offer an online process for permitting submission and approval.	N/A	0		
P-12: Make permit data open and accessible to other departments.	N/A	0		
Total verified points in Permitting		0		
Points pending Advisor Engagement/Review in Permitting		45		
Total proposed points in Permitting		45		

Planning, Zoning, & Development Regulations (PZD)

Criteria	Addressed in	Points	Month Started	Month Completed
PZD-1a: Review zoning requirements and identify restrictions that intentionally or unintentionally prohibit solar PV development. Compile findings in a memo. (Required)	Advisor Plan	Requirement Proposed	1	1
PZD-1b: Formally present PZD-1a memo findings to planning commission, or relevant body	N/A	0		
PZD-1c: Draft proposed language for changes to zoning code based on PZD-1a memo. Involve planners and/or local zoning experts in the creation of the draft language	Advisor Plan	5		
PZD-2: Allow accessory use solar PV by right in all major zones. (Required for Silver and Gold)	Advisor Plan	20	1	6
PZD-3a: Conduct review of existing planning documents and identify new opportunities to integrate solar PV into planning goals.	N/A	0		
PZD-3b: In consultation with planners and other staff, provide draft language on solar PV, which will be proposed for inclusion in existing or future plans. Provide a timeline for when the language will be considered for incorporation into plans.	N/A	0		
PZD-4: Provide clear guidance for solar PV in historic and special use districts.	N/A	0		
PZD-5: Integrate solar PV and/or shared solar into relevant local plans (e.g. energy plan, climate plan, comprehensive plan).	Advisor Plan	10	1	6
PZD-6: Include considerations for active and passive solar in development regulations (e.g. providing guidance for orientation of structures in subdivision regulations).	N/A	0		
PZD-7: Provide development incentives for solar PV within subdivision or zoning process or as part of other development incentives (e.g. density or height bonuses and other incentives for buildings which plan to install solar PV).	N/A	0		
PZD-8: Encourage or incentivize solar PV development on parking lots, vacant lots, landfills, buffer lands around uses with nuisances (refineries, wastewater plants), brownfields or formerly contaminated lands, airport safety zones (with FAA approval) and non-building structures.	N/A	0		
PZD-9: Training planning staff on best practices in planning and zoning for solar PV. Training must have occurred within the past five years.	N/A	0		
PZD-10a: Ensure that the zoning ordinance clarifies regulations for small ground-mounted solar PV.	N/A	0		
PZD-10b: Ensure that the zoning ordinance establishes a clear regulatory pathway for primary use solar PV (for example through a special use permit or through inclusion among allowed conditional uses).	N/A	0		
PZD-10c: Ensure that the zoning ordinance exempts rooftop solar PV from certain restrictions on accessory uses (e.g. height limits, rooftop equipment screening requirements, or other restrictions).	N/A	0		
PZD-10d: Ensure that the zoning ordinance exempts small ground-mounted solar PV from certain restrictions on accessory uses (e.g. setbacks, coverage or impervious surface calculations, or other restrictions).	N/A	0		
PZD-11: Create and provide online a handout for developers that provides an overview of what development regulations allow under which conditions (e.g. types and sizes of solar PV arrays permitted, the processes required, and other relevant information, such as design standards, and policy outside of the zoning language).	N/A	0		
Total verified points in PZD		0		
Points pending TA/Review in PZD		30		
Total proposed points in PZD		30		

Total verified points in Foundational Categories	0
Points pending Advisor Engagement/Review in Foundational Categories	75
Total proposed points in Foundational Categories (verified + pending points)	75

Special Focus Categories: (1)Inspection, (2)Construction Codes, (3)Solar Rights, (4)Utility Engagement, (5)Community Engagement, and (6)Market Development & Finance

Inspection				
Criteria	Addressed in	Points	Month Started	Month Completed
I-1: Provide cross-training of inspection and permitting staff on solar PV via in-person or online resources. Training must have occurred within the past five years. (Required for Silver and Gold)	Advisor Plan	20	1	3
I-2: Require no more than two inspections for accessory-use solar PV.	N/A	0		
I-3: Offer inspection appointment times in lieu of appointment windows.	N/A	0		
I-4: Make inspection requirements for solar PV available online.	Advisor Plan	10	1	2
I-5: Have a fixed time frame between inspection requests and scheduling of inspections of no more than 10 days.	N/A	0		
I-6: Provide an online process for scheduling and responding to inspection requests.	Points Awarded by Reviewers	20		
Total verified points in Inspection		20		
Points pending Advisor Engagement/Review in Inspection		30		
Total proposed points in Inspection		50		

Construction Codes				
Criteria	Addressed in	Points	Month Started	Month Completed
CC-1a: Develop and provide "solar-ready construction guidelines" for developers to enable lower cost installation of future solar PV installations on buildings within the permitting office and online.	N/A	0		
CC-1b: Earn additional points: Include guidance for solar PV on parking lots and other types of non-traditional structures.	Advisor Plan	10	1	3
CC-2: Require or incentivize new construction to be solar ready in order to complete future installations at lower cost.	N/A	0		
CC-3: Offer design guidelines for solar PV aligned with NEC and fire code.	N/A	0		
CC-4: Adopt the most recent KC codes. Appendix U from the 2015 IRC regarding solar ready construction must be adopted to receive credit.	Points Not Awarded	0		
Total verified points in Construction Codes		0		
Points pending TA/Review in Construction Codes		10		
Total proposed points in Construction Codes		10		

Solar Rights				
Criteria	Addressed in	Points	Month Started	Month Completed
SR-1: Conduct review of state policies related to protecting rights of property owners to install solar and solar system owners' right to sunlight on their property. Make this information available to residents.	N/A	0		
SR-2: Provide consumer protection resources on solar PV which help consumers make informed solar PV purchasing decisions.	Advisor Plan	5	1	4
SR-3: Develop local process to enable solar rights through a solar access ordinance.	N/A	0		
SR-4: Offer procedure for recording solar easements for property owners.	N/A	0		
SR-5a: Engage homeowners' and neighborhood associations and discourage unnecessarily restrictive requirements for solar PV through meetings with leadership.	N/A	0		
SR-5b: Earn additional points: Encourage subdivisions to consider shared solar allowances.	N/A	0		
SR-5c: Earn additional points: Work with HOAs to develop appropriate guideline documents for solar PV.	N/A	0		
Total verified points in Solar Rights		0		
Points pending Advisor Engagement/Review in Solar Rights		5		
Total proposed points in Solar Rights		5		

Utility Engagement				
Criteria	Addressed in	Points	Month Started	Month Completed
U-1: Review best practices for integrating interconnection with electrical inspections and share best practices with staff.	N/A	0		
U-2: Discuss community or shared solar PV programs with local utility.	N/A	0		
U-3a: Engage and communicate with utility on community goals for solar PV, net metering and interconnection processes.	Advisor Plan	10	1	4
U-3b: Earn additional points: Coordinate with regional organization or other local governments to engage utilities.	Advisor Plan	5	1	2
U-4: Coordination of utility and city inspections for solar PV, reducing the total number of inspections needed.	N/A	0		
U-5: Launch of and outreach support for utility-provided community solar program.	N/A	0		
Total verified points in Utility Engagement		0		
Points pending Advisor Engagement/Review in Utility Engagement		15		
Total proposed points in Utility Engagement		15		

Community Engagement				
Criteria	Addressed in	Points	Month Started	Month Completed
CE-1: Active energy task force or working group which meets on at least three times per year.	N/A	0		
CE-2: Create a solar landing page on local government's website with information on community's solar goals and local resources for solar development.	Advisor Plan	10	1	5
CE-3: Encourage solar PV on non-profit or community facilities through fee waivers, technical assistance or connections to other forms of support.	N/A	0		
CE-4a: Support or host a community-group purchase program (e.g. a Solarize campaign).	Advisor Plan	20	1	6
CE-4b: Earn additional points: Design program or create financing support options to encourage low-to-moderate income participation in community solar initiatives.	N/A	0		
CE-5a: Host a solar workshop open to the general public and/or local government staff explaining solar PV opportunities and policies.	N/A	0		
CE-5b: Creation and distribution of educational materials at relevant community events and through local government channels.	Advisor Plan	5	1	1
CE-5c: Establish partnerships with local non-profits or organizations on solar PV with multi-year goal or planned initiatives.	N/A	0		
CE-5d: Publicly encourage community solar projects or solar PV projects on community facilities.	N/A	0		
CE-5e: Engage community in robust, on-going discussion around climate, energy or sustainability plans.	For Review	5		
CE-6: Create and publish job training and placement opportunities for solar in coordination with local community colleges.	N/A	0		
CE-7: Conduct feasibility analysis for solar PV on brownfields, landfills, formerly contaminated lands and/or other under-utilized properties.	N/A	0		
CE-8: Install or lease land for solar PV development on brownfields, landfills, formerly contaminated lands and/or other under-utilized properties.	N/A	0		
CE-9: Engage with regional organizations on advancing solar PV policies in the region including, but not limited to unified permitting processes and group procurement opportunities.	N/A	0		
CE-10: Demonstrate activity in state-level conversations regarding solar PV.	N/A	0		
CE-11: Create and/ share an interactive solar map for your community.	N/A	0		
Total verified points in Community Engagement		0		
Points pending Advisor Engagement/Review in Community Engagement		40		
Total proposed points in Community Engagement		40		

Market Development & Finance				
Criteria	Addressed in	Points	Month Started	Month Completed
MDF-1: Provide resources on active solar installers and/or local incentives for solar PV.	N/A	0		
MDF-2: Make solar PV metrics publicly available.	N/A	0		
MDF-3: Provide information to consumers about different solar PV financing options, including commercial options, such as property-assessed clean energy (PACE) financing.	Points Awarded by Reviewers	5		
MDF-4: Conduct feasibility analysis for solar PV installations on public facilities.	Advisor Plan	10	1	6
MDF-5: Install solar PV capacity on local facilities.	Advisor Plan	20	1	6
MDF-6a: If applicable, provide PACE financing in your community.	Points Awarded by Reviewers	10		
MDF-6b: Demonstrate that PACE financing has been used to finance solar PV in your community	N/A	0		
MDF-7: Provide local incentives (i.e. permit fee waivers, rebates, or property tax exemptions) or locally-enabled finance (i.e. a revolving loan fund) for solar PV.	N/A	0		
MDF-8: Engage local banks, credit unions, foundations and/or community funds about lending for solar PV projects through in-person meetings, discussions and/or workshops.	N/A	0		
MDF-9: Demonstrate that community's installed (per capita capacity is above top 20% of states (>95 watts/person).	N/A	0		
MDF-10: Integrate solar PV with other distributed or emerging technologies such as storage, CHP or electric vehicles in at least one installed or proposed project.	N/A	0		
MDF-11: Demonstrate emergency analysis or planning for resilient solar technologies for critical facilities and emergency planning such as solar and storage.	N/A	0		
Total verified points in Market Development & Finance		15		
Points pending Advisor Engagement/Review in Market Development & Finance		30		
Total proposed points in Market Development & Finance		45		

Total verified points in Special Focus Categories	35
Points pending TA/Review in Special Focus Categories	130
Total proposed points in Special Focus Categories (verified + pending points)	165

Summary: Verified & Proposed Points		
SolSmart Bronze Prerequisites		
	Completed?	Pending TA/Review?
PR-1: Solar Statement	Done	
P-1: Create and make available an online checklist detailing the steps of your community's solar permitting process.		Pending
PZD-1: Local government has reviewed zoning requirements and removed restrictions intentionally or unintentionally prohibiting PV development. Compile findings in a memo, and commit to reducing barriers to PV during next zoning review.		Pending

Chosen Level of Designation
You have chosen to pursue Silver designation.

SolSmart Silver Prerequisites		
	Completed?	Pending TA/Review?
PZD-2: Allow solar by-right and as an accessory use in all major zones, and implement any zoning ordinance adjustments identified through the zoning review to improve solar-friendliness.		Pending
I-1: Provide cross-training of inspection and permitting staff on solar PV via in-person or online resources.		Pending

SolSmart Gold Prerequisite		
	Completed?	Pending TA/Review?
P-2: Provide a streamlined permitting pathway for small PV systems with turn-around time of no more than 3 days.		

Foundational Categories Points		
	Completed?	Pending TA/Review?
Permitting	0	45
Planning, Zoning, & Development Regulations	0	30
Total Foundational Points	0	75

Special Focus Categories Points		
	Completed?	Pending TA/Review?
Inspection	20	30
Construction Codes	0	10
Solar Rights	0	5
Utility Engagement	0	15
Community Engagement	0	40
Market Development & Finance	15	30
Total Special Focus Points	35	130

Total Verified SolSmart Points	35	Points pending TA/Review	205
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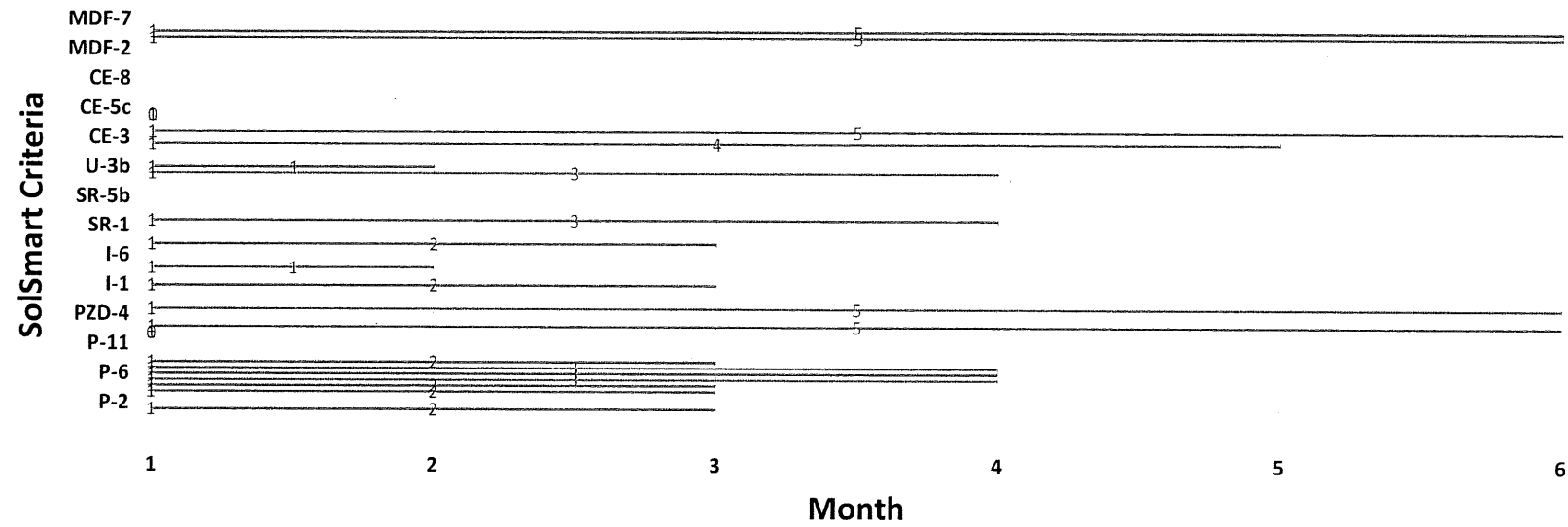
Total Proposed Points	240
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Current Designation Level
None

Pending Designation Level
Silver

Your community is close to Gold designation. Consider amending the level of designation on the 'Introduction' tab and pursuing the actions to achieve this level of designation.

## Advisor Milestones



Milestones
Instructions
<p>Please use the space below to provide narratives for the milestones shown in the Gantt chart in the previous tab. Use this space to help clarify anything that may not be clear. Note that there should be at least one milestone per month.</p>

Milestone #	Milestone	Date of completion
M-1	Complete PZD-1a, file documentation for CE-5b. Examine permitting processes for P-6 and P-7. Initiate work on all other criteria by scheduling meetings with relevant staff. Initiate work on long-term (M-6) actions.	End of M-1
M-2	Complete 1-4 and U-3b and file documentation. Make additional progress on all other criteria. Schedule U-3a for M-4.	End of M-2
M-3	Complete P-1, P-4, P-5a, P-8, and CC-1b and file documentation.	End of M-3
M-4	Prepare for and complete U-3a and file documentation. Complete P-6 and P-7 and filed documentation.	End of M-4
M-5	Complete CE-2 and file documentation.	End of M-5
M-6	Complete PZD-2, PZD-5, CE-4a, MDF-4, MDF-5. (Note, CE-4a can be replicated from FL SUN initiatives; MDF-4/5 are already in early stages).	End of M-6

Additional Actions
Instructions
<p>Advisors must work exclusively on actions that directly relate to the achievement of program criteria. However, Advisors are allowed and encouraged to engage in activities that raise awareness about the SolSmart program. This may include activities such as participating in conferences or meeting with representatives from other cities/counties or relevant organizations within your region. In the space provided below, please detail possibilities, if any, that you foresee for an Advisor to conduct outreach during his or her engagement.</p>

<p>Example:</p> <ul style="list-style-type: none"><li>• We will introduce the Advisor to our colleagues in other cities within our 5-county region.</li><li>• The Advisor can attend a regional workshop in x month to learn more about the region and network and inform others about the tools and techniques deployed to promote solar power in their community.</li></ul>

# **Lake Worth, FL**

SolSmart Advisor

Host Community Calculator

SolSmart Advisor Host Community Application



Instructions

- 1) Complete the "Foundational Categories" tab. Add criteria to your Advisor Plan by clicking in the "Addressed in" column and selecting "Advisor Plan." For the criteria that you add to your Advisor Plan, choose which month you will start and complete the action. These actions will appear in the Gantt chart on the "Milestones" tab.
- 2) Complete the "Special Focus Categories" tab. Add criteria to your Advisor Plan by clicking in the "Addressed in" column and selecting "Advisor Plan." For the criteria that you add to your Advisor Plan, choose which month you will start and complete the action. These actions will appear in the Gantt chart on the "Milestones" tab.
- 3) Review the "Summary" tab to ensure that you reach your desired level of designation.
- 4) Review the "Milestones" tab to ensure that the timing of completion is accurate, reflects your intended timeline, and relate to the community's desired level of designation.
- 5) Complete the "Milestones Narrative" to provide more information or clarify any element.

Choose Your Desired Level of Designation

Decide whether your community wishes to pursue Bronze, Silver, or Gold designation. This can be changed at any time.

Bronze

Foundational Categories: Permitting and Planing, Zoning, & Development Regulations

Solar Statement

Criteria	Addressed in	Points	Month Started	Month Completed
PH-1: A letter indicating commitment to pursuing SolSmart designation and supporting solar development locally. Statement includes: statement of solar goals/areas of focus, past achievements, commitment to tracking metrics, and a commitment of staff time and resources. (Required)	Points Awarded by Reviewers	Requirement Achieved		

Permitting

Criteria	Addressed in	Points	Month Started	Month Completed
P-1: Create and make available an online checklist detailing the steps of your community's solar permitting process. (Required)	Advisor Plan	Requirement Proposed	1	2
P-2: Provide a streamlined permitting pathway for small solar PV systems with turn-around time of no more than 3 days. (Required for Gold)	Advisor Plan	20	1	6
P-3: Distinguish between systems qualifying for streamlined or standard review.	N/A	0		
P-4: Require no more than one application form for a residential rooftop solar PV project.	N/A	0		
P-5a: Conduct a review of solar permit fees for residential and commercial solar PV.	N/A	0		
P-5b: Earn additional points: Revise or demonstrate that permit fees reflect national best practices (\$400 or less for residential, and based on cost-recovery for commercial).	Advisor Plan	5	3	4
P-6: Review permitting process for efficiency improvements and reduce processing time to 10 days or less.	N/A	0		
P-7: Adopt a standard solar PV permit form aligned with best practices (e.g. Solar ABCs).	N/A	0		
P-8: Train permitting staff on best practices for permitting solar PV and/or solar and storage systems. Training must have occurred within the past five years.	N/A	0		
P-9: Train fire and safety staff on solar PV. Training must have occurred within the past five years.	N/A	0		
P-10: Develop a regular communication schedule to solicit recommendations from the solar installer community regarding procedural changes.	N/A	0		
P-11: Offer an online process for permitting submission and approval.	N/A	0		
P-12: Make permit data open and accessible to other departments.	N/A	0		
Total verified points in Permitting		0		
Points pending Advisor Engagement/Review in Permitting		25		
Total proposed points in Permitting		25		

Planning, Zoning, & Development Regulations (PZD)

Criteria	Addressed in	Points	Month Started	Month Completed
PZD-1a: Review zoning requirements and identify restrictions that intentionally or unintentionally prohibit solar PV development. Compile findings in a memo. (Required)	Advisor Plan	Requirement Proposed		
PZD-1b: Formally present PZD-1a memo findings to planning commission, or relevant body	Advisor Plan	5	4	4
PZD-1c: Draft proposed language for changes to zoning code based on PZD-1a memo. Involve planners and/or local zoning experts in the creation of the draft language	Advisor Plan	5	5	6
PZD-2: Allow accessory use solar PV by right in all major zones. (Required for Silver and Gold)	Advisor Plan	20	2	5
PZD-3a: Conduct review of existing planning documents and identify new opportunities to integrate solar PV into planning goals.	Advisor Plan	5	5	6
PZD-3b: In consultation with planners and other staff, provide draft language on solar PV, which will be proposed for inclusion in existing or future plans. Provide a timeline for when the language will be considered for incorporation into plans.	N/A	0		
PZD-4: Provide clear guidance for solar PV in historic and special use districts.	N/A	0		
PZD-5: Integrate solar PV and/or shared solar into relevant local plans (e.g. energy plan, climate plan, comprehensive plan).	N/A	0		
PZD-6: Include considerations for active and passive solar in development regulations (e.g. providing guidance for orientation of structures in subdivision regulations).	N/A	0		
PZD-7: Provide development incentives for solar PV within subdivision or zoning process or as part of other development incentives (e.g. density or height bonuses and other incentives for buildings which plan to install solar PV).	N/A	0		
PZD-8: Encourage or incentivize solar PV development on parking lots, vacant lots, landfills, buffer lands around uses with nuisances (refineries, wastewater plants), brownfields or formerly contaminated lands, airport safety zones (with FAA approval) and non-building structures.	N/A	0		
PZD-9: Training planning staff on best practices in planning and zoning for solar PV. Training must have occurred within the past five years.	N/A	0		
PZD-10a: Ensure that the zoning ordinance clarifies regulations for small ground-mounted solar PV.	N/A	0		
PZD-10b: Ensure that the zoning ordinance establishes a clear regulatory pathway for primary use solar PV (for example through a special use permit or through inclusion among allowed conditional uses).	N/A	0		
PZD-10c: Ensure that the zoning ordinance exempts rooftop solar PV from certain restrictions on accessory uses (e.g. height limits, rooftop equipment screening requirements, or other restrictions).	N/A	0		
PZD-10d: Ensure that the zoning ordinance exempts small ground-mounted solar PV from certain restrictions on accessory uses (e.g. setbacks, coverage or impervious surface calculations, or other restrictions).	N/A	0		
PZD-11: Create and provide online a handout for developers that provides an overview of what development regulations allow under which conditions (e.g. types and sizes of solar PV arrays permitted, the processes required, and other relevant information, such as design standards, and policy outside of the zoning language).	N/A	0		
Total verified points in PZD		0		
Points pending TA/Review in PZD		25		
Total proposed points in PZD		25		

Total verified points in Foundational Categories	0
Points pending Advisor Engagement/Review in Foundational Categories	50
Total proposed points in Foundational Categories (verified + pending points)	50



Special Focus Categories: (1)Inspection, (2)Construction Codes, (3)Solar Rights, (4)Utility Engagement, (5)Community Engagement, and (6)Market Development & Finance

Inspection				
Criteria	Addressed In	Points	Month Started	Month Completed
solar PV via in-person or online resources. Training must have occurred within the past five years. (Required for Silver and Gold)	Advisor Plan	20		
I-2: Require no more than two inspections for accessory-use solar PV.	Advisor Plan	10		
I-3: Offer inspection appointment times in lieu of appointment windows.	N/A	0		
I-4: Make inspection requirements for solar PV available online.	N/A	0		
I-5: Have a fixed time frame between inspection requests and scheduling of inspections of no more than 10 days.	N/A	0		
I-6: Provide an online process for scheduling and responding to inspection requests.	N/A	0		
Total verified points in Inspection		0		
Points pending Advisor Engagement/Review in Inspection		30		
Total proposed points in Inspection		30		

Construction Codes				
Criteria	Addressed In	Points	Month Started	Month Completed
CC-1a: Develop and provide "solar-ready construction guidelines" for developers to enable lower cost installation of future solar PV installations on buildings within the permitting office and online.	N/A	0		
CC-1b: Earn additional points: Include guidance for solar PV on parking lots and other types of non-traditional structures.	N/A	0		
CC-2: Require or incentivize new construction to be solar ready in order to complete future installations at lower cost.	N/A	0		
CC-3: Offer design guidelines for solar PV aligned with NEC and fire code.	N/A	0		
CC-4: Adopt the most recent ICC codes. Appendix U from the 2015 IRC regarding solar ready construction must be adopted to receive credit.	Points Awarded by Reviewers	20		
Total verified points in Construction Code		20		
Points pending TA/Review in Construction Code		0		
Total proposed points in Construction Code		20		

Solar Rights				
Criteria	Addressed In	Points	Month Started	Month Completed
SR-1: Conduct review of state policies related to protecting rights of property owners to install solar and solar system owners' right to sunlight on their property. Make this information available to residents.	N/A	0		
SR-2: Provide consumer protection resources on solar PV which help consumers make informed solar PV purchasing decisions.	N/A	0		
SR-3: Develop local process to enable solar rights through a solar access ordinance.	N/A	0		
SR-4: Offer procedure for recording solar easements for property owners.	N/A	0		
SR-5a: Engage homeowners' and neighborhood associations and discourage unnecessarily restrictive requirements for solar PV through meetings with leadership.	N/A	0		
SR-5b: Earn additional points: encourage subdivisions to consider shared solar allowances.	N/A	0		
SR-5c: Earn additional points: Work with HOAs to develop appropriate guideline documents for solar PV.	N/A	0		
Total verified points in Solar Rights		0		
Points pending Advisor Engagement/Review in Solar Rights		0		
Total proposed points in Solar Rights		0		

Utility Engagement				
Criteria	Addressed In	Points	Month Started	Month Completed
U-1: Review best practices for integrating interconnection with electrical inspections and share best practices with staff.	N/A	0		
U-2: Discuss community or shared solar PV programs with local utility.	N/A	0		
U-3a: Engage and communicate with utility on community goals for solar PV, net metering and interconnection processes.	N/A	0		
U-3b: Earn additional points: Coordinate with regional organization or other local governments to engage utilities.	N/A	0		
U-4: Coordination of utility and city inspections for solar PV, reducing the total number of inspections needed.	N/A	0		
U-5: Launch of and outreach support for utility-provided community solar program.	N/A	0		
Total verified points in Utility Engagement		0		
Points pending Advisor Engagement/Review in Utility Engagement		0		
Total proposed points in Utility Engagement		0		

Community Engagement				
Criteria	Addressed In	Points	Month Started	Month Completed
CE-1: Active energy task force or working group which meets on at least three times per year.	N/A	0		
CE-2: Create a solar landing page on local government's website with information on community's solar goals and local resources for solar development.	N/A	0		
CE-3: Encourage solar PV on non-profit or community facilities through fee waivers, technical assistance or connections to other forms of support.	N/A	0		
CE-4a: Support or host a community group purchase program (e.g. a Solarize campaign).	N/A	0		
CE-4b: Earn additional points: Design program or create financing support options to encourage low-to-moderate income participation in community solar initiatives.	N/A	0		
CE-5a: Host a solar workshop open to the general public and/or local government staff explaining solar PV opportunities and policies.	N/A	0		
CE-5b: Creation and distribution of educational materials at relevant community events and through local government channels.	N/A	0		
CE-5c: Establish partnerships with local non-profits or organizations on solar PV with multi-year goal or planned initiatives.	N/A	0		
CE-5d: Publicly encourage community solar projects or solar PV projects on community facilities.	Points Awarded by Reviewers	5		
CE-5e: Engage community in robust, on-going discussion around climate, energy or sustainability plans.	N/A	0		
CE-6: Create and publish job training and placement opportunities for solar in coordination with local community colleges.	N/A	0		
CE-7: Conduct feasibility analysis for solar PV on brownfields, landfills, formerly contaminated lands and/or other under-utilized properties.	For Review	10		
CE-8: Install or lease land for solar PV development on brownfields, landfills, formerly contaminated lands and/or other under-utilized properties.	Points Awarded by Reviewers	20		
CE-9: Engage with regional organizations on advancing solar PV policies in the region including, but not limited to unified permitting processes and group procurement opportunities.	N/A	0		
CE-10: Demonstrate activity in state-level conversations regarding solar PV.	N/A	0		
CE-11: Create and/or share an interactive solar map for your community.	N/A	0		
Total verified points in Community Engagement		25		
Points pending Advisor Engagement/Review in Community Engagement		10		
Total proposed points in Community Engagement		35		

Market Development & Finance				
Criteria	Addressed In	Points	Month Started	Month Completed
MDF-1: Provide resources on active solar installers and/or local incentives for solar PV.	N/A	0		
MDF-2: Make solar PV metrics publicly available.	N/A	0		
MDF-3: Provide information to consumers about different solar PV financing options, including commercial options, such as property-assessed clean energy (PACE) financing.	N/A	0		
MDF-4: Conduct feasibility analysis for solar PV installations on public facilities.	N/A	0		
MDF-5: Install solar PV capacity on local facilities.	N/A	0		
MDF-6a: If applicable, provide PACE financing in your community.	N/A	0		
MDF-6b: Demonstrate that PACE financing has been used to finance solar PV in your community	N/A	0		
MDF-7: Provide local incentives (i.e. permit fee waivers, rebates, or property tax exemptions) or locally-enabled finance (i.e. a revolving loan fund) for solar PV.	N/A	0		
MDF-8: Engage local banks, credit unions, foundations and/or community funds about lending for solar PV projects through in-person meetings, discussions and/or workshops.	N/A	0		
MDF-9: Demonstrate that community's installed per capita capacity is above top 20% of states (>99 watts/person).	N/A	0		
MDF-10: Integrate solar PV with other distributed or emerging technologies such as storage, CHP or electric vehicles in at least one installed or proposed project.	N/A	0		
MDF-11: Demonstrate feasibility analysis or planning for resilient solar technologies for critical facilities and emergency planning such as solar and storage.	N/A	0		
Total verified points in Market Development & Finance		0		
Points pending Advisor Engagement/Review in Market Development & Finance		0		
Total proposed points in Market Development & Finance		0		

Total verified points in Special Focus Categories	45
Points pending TA/Review in Special Focus Categories	40
Total proposed points in Special Focus Categories (verified + pending points)	85

Summary: Verified & Proposed Points		
SolSmart Bronze Prerequisites		
	Completed?	Pending TA/Review?
PR-1: Solar Statement	Done	
P-1: Create and make available an online checklist detailing the steps of your community's solar permitting process.		Pending
PZD-1: Local government has reviewed zoning requirements and removed restrictions intentionally or unintentionally prohibiting PV development. Compile findings in a memo, and commit to reducing barriers to PV during next zoning review.		Pending

SolSmart Silver Prerequisites		
	Completed?	Pending TA/Review?
PZD-2: Allow solar by-right and as an accessory use in all major zones, and implement any zoning ordinance adjustments identified through the zoning review to improve solar-friendliness.		Pending
I-1: Provide cross-training of inspection and permitting staff on solar PV via in-person or online resources.		Pending

SolSmart Gold Prerequisite		
	Completed?	Pending TA/Review?
P-2: Provide a streamlined permitting pathway for small PV systems with turn-around time of no more than 3 days.		Pending

Foundational Categories Points		
	Completed?	Pending TA/Review?
Permitting	0	25
Planning, Zoning, & Development Regulations	0	25
Total Foundational Points	0	50

Special Focus Categories Points		
	Completed?	Pending TA/Review?
Inspection	0	30
Construction Codes	20	0
Solar Rights	0	0
Utility Engagement	0	0
Community Engagement	25	10
Market Development & Finance	0	0
Total Special Focus Points	45	40

Total Verified SolSmart Points	45	Points pending TA/Review	90
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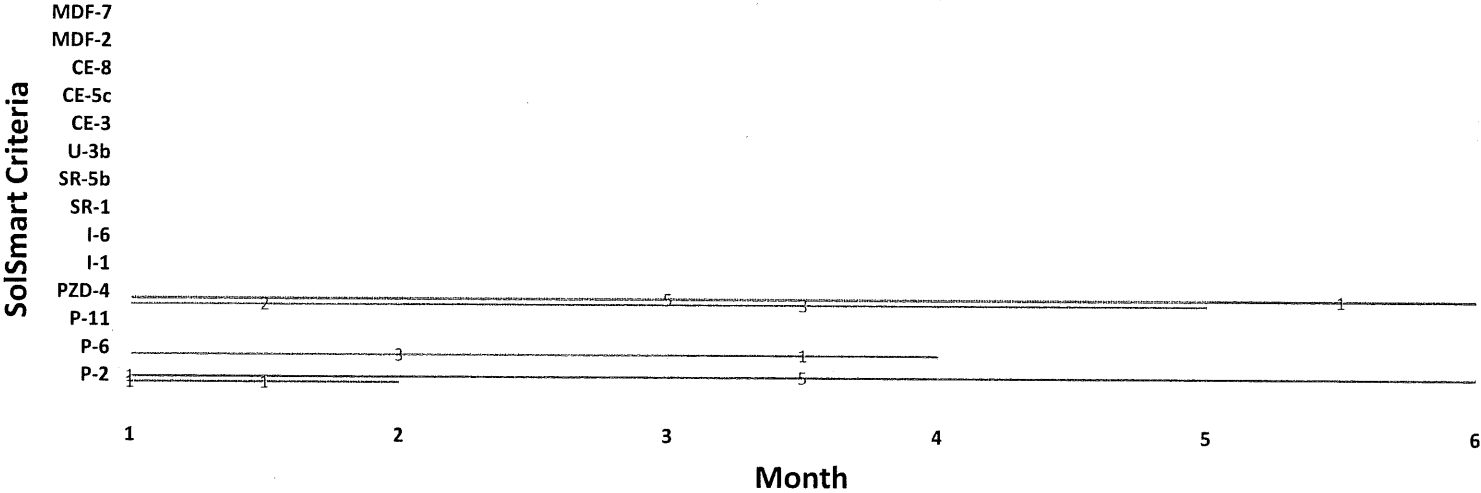
Total Proposed Points	135
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Current Designation Level
None

Pending Designation Level
Silver

Chosen Level of Designation
You have chosen to pursue Bronze designation.

Advisor Milestones



Milestones
Instructions
<p>Please use the space below to provide narratives for the milestones shown in the Gantt chart in the previous tab. Use this space to help clarify anything that may not be clear. Note that there should be at least one milestone per month.</p>

Milestone #	Milestone	Date of completion
M-Example	<i>Examples:</i> <ul style="list-style-type: none"><li>• The Advisor will assist the community achieve criteria worth at least 15 points</li></ul> <i>Or</i> <ul style="list-style-type: none"><li>• The Advisor will complete all Bronze prerequisite criteria</li></ul> <i>Or</i> <ul style="list-style-type: none"><li>• The Advisor will complete I-1, CE-2, and MDF-1</li></ul>	
M-1	The Advisor will complete all Bronze prerequisite criteria	
M-2		
M-3		
M-4		
M-5		
M-6		

Additional Actions
Instructions
<p>Advisors must work exclusively on actions that directly relate to the achievement of program criteria. However, Advisors are allowed and encouraged to engage in activities that raise awareness about the SolSmart program. This may include activities such as participating in conferences or meeting with representatives from other cities/counties or relevant organizations within your region. In the space provided below, please detail possibilities, if any, that you foresee for an Advisor to conduct outreach during his or her engagement.</p>

<p>Example:</p> <ul style="list-style-type: none"><li>• We will introduce the Advisor to our colleagues in other cities within our 5-county region.</li><li>• The Advisor can attend a regional workshop in x month to learn more about the region and network and inform others about the tools and techniques deployed to promote solar power in their community.</li></ul>

# **Lantana, FL**

SolSmart Advisor

Host Community Calculator

SolSmart Advisor Host Community Application



- Instructions
- 1) Complete the "Foundational Categories" tab. Add criteria to your Advisor Plan by clicking in the "Addressed in" column and selecting "Advisor Plan." For the criteria that you add to your Advisor Plan, choose which month you will start and complete the action. These actions will appear in the Gantt chart on the "Milestones" tab.

2) Complete the "Special Focus Categories" tab. Add criteria to your Advisor Plan by clicking in the "Addressed in" column and selecting "Advisor Plan." For the criteria that you add to your Advisor Plan, choose which month you will start and complete the action. These actions will appear in the Gantt chart on the "Milestones" tab.

3) Review the "Summary" tab to ensure that you reach your desired level of designation.

4) Review the "Milestones" tab to ensure that the timing of completion is accurate, reflects your intended timeline, and relate to the community's desired level of designation.

5) Complete the "Milestones Narrative" to provide more information or clarify any element.

Choose Your Desired Level of Designation	
Criteria	Addressed in
Decide whether your community wishes to pursue Bronze, Silver, or Gold designation. This can be changed at any time.	Silver

Foundational Categories: Permitting and Planing, Zoning, & Development Regulations

Solar Statement				
Criteria	Addressed in	Points	Month Started	Month Completed
PR-1: A letter indicating commitment to pursuing SolSmart designation and supporting solar development locally. Statement includes: statement of solar goals/areas of focus, past achievements, commitment to tracking metrics, and a commitment of staff time and resources. (Required)	Points Awarded by Reviewers	Requirement Achieved		

Criteria	Addressed in	Points	Month Started	Month Completed
P-1: Create and make available an online checklist detailing the steps of your community's solar permitting process. (Required)	Advisor Plan	Requirement Proposed	1	2
P-2: Provide a streamlined permitting pathway for small solar PV systems with turn-around time of no more than 3 days. (Required for Gold)	Advisor Plan	20	3	3
P-3: Distinguish between systems qualifying for streamlined or standard review.	N/A	0		
P-4: Require no more than one application form for a residential rooftop solar PV project.	Advisor Plan	5	3	3
P-5a: Conduct a review of solar permit fees for residential and commercial solar PV.	Advisor Plan	5	4	4
P-5b: Earn additional points: Revise or demonstrate that permit fees reflect national best practices (\$400 or less for residential, and based on cost-recovery for commercial).	Advisor Plan	5	3	3
P-6: Review permitting process for efficiency improvements and reduce processing time to 10 days or less.	Advisor Plan	10	3	3
P-7: Adopt a standard solar PV permit form aligned with best practices (e.g. Solar ABCs).	Advisor Plan	10	5	5
P-8: Train permitting staff on best practices for permitting solar PV and/or solar and storage systems. Training must have occurred within the past five years.	Advisor Plan	10	5	6
P-9: Train fire and safety staff on solar PV. Training must have occurred within the past five years.	N/A	0		
P-10: Develop a regular communication schedule to solicit recommendations from the solar installer community regarding procedural changes.	Advisor Plan	10		
P-11: Offer an online process for permitting submission and approval.	N/A	0		
P-12: Make permit data open and accessible to other departments.	Advisor Plan	20		
Total verified points in Permitting		0		
Points pending Advisor Engagement/Review in Permitting		95		
Total proposed points in Permitting		95		

Criteria	Addressed in	Points	Month Started	Month Completed
PZD-1a: Review zoning requirements and identify restrictions that intentionally or unintentionally prohibit solar PV development. Compile findings in a memo. (Required)	Advisor Plan	Requirement Proposed	1	2
PZD-1b: Formally present PZD-1a memo findings to planning commission, or relevant body	Advisor Plan	5	3	4
PZD-1c: Draft proposed language for changes to zoning code based on PZD-1a memo. Involve planners and/or local zoning experts in the creation of the draft language	Advisor Plan	5	4	6
PZD-2: Allow accessory use solar PV by right in all major zones. (Required for Silver and Gold)	Advisor Plan	20	3	4
PZD-3a: Conduct review of existing planning documents and identify new opportunities to integrate solar PV into planning goals.	N/A	0		
PZD-3b: In consultation with planners and other staff, provide draft language on solar PV, which will be proposed for inclusion in existing or future plans. Provide a timeline for when the language will be considered for incorporation into plans.	Advisor Plan	5	5	6
PZD-4: Provide clear guidance for solar PV in historic and special use districts.	N/A	0		
PZD-5: Integrate solar PV and/or shared solar into relevant local plans (e.g. energy plan, climate plan, comprehensive plan).	Advisor Plan	10	5	5
PZD-6: Include considerations for active and passive solar in development regulations (e.g. providing guidance for orientation of structures in subdivision regulations).	N/A	0		
PZD-7: Provide development incentives for solar PV within subdivision or zoning process or as part of other development incentives (e.g. density or height bonuses and other incentives for buildings which plan to install solar PV).	N/A	0		
PZD-8: Encourage or incentivize solar PV development on parking lots, vacant lots, landfills, buffer lands around uses with nuisances (refineries, wastewater plants), brownfields or formerly contaminated lands, airport safety zones (with FAA approval) and non-building structures.	N/A	0		
PZD-9: Train planning staff on best practices in planning and zoning for solar PV. Training must have occurred within the past five years.	Advisor Plan	10	6	6
PZD-10a: Ensure that the zoning ordinance clarifies regulations for small ground-mounted solar PV.	Advisor Plan	5	5	6
PZD-10b: Ensure that the zoning ordinance establishes a clear regulatory pathway for primary use solar PV (for example through a special use permit or through inclusion among allowed conditional uses).	N/A	0		
PZD-10c: Ensure that the zoning ordinance exempts rooftop solar PV from certain restrictions on accessory uses (e.g. height limits, rooftop equipment screening requirements, or other restrictions).	N/A	0		
PZD-10d: Ensure that the zoning ordinance exempts small ground-mounted solar PV from certain restrictions on accessory uses (e.g. setbacks, coverage or impervious surface calculations, or other restrictions).	N/A	0		
PZD-11: Create and provide online a handout for developers that provides an overview of what development regulations allow under which conditions (e.g. types and sizes of solar PV arrays permitted, the processes required, and other relevant information, such as design standards, and policy outside of the zoning language).	N/A	0		
Total verified points in PZD		0		
Points pending TA/Review in PZD		45		
Total proposed points in PZD		45		

Total verified points in Foundational Categories	0
Points pending Advisor Engagement/Review in Foundational Categories	140
Total proposed points in Foundational Categories (verified + pending points)	140

**Special Focus Categories: (1)Inspection, (2)Construction Codes, (3)Solar Rights, (4)Utility Engagement, (5)Community Engagement, and (6)Market Development & Finance**

Inspection					
Criteria	Addressed in	Points	Month Started	Month Completed	
I-1: Provide cross-training of inspection and permitting staff on solar PV via in-person or online resources. Training must have occurred within the past five years. (Required for Silver and Gold)	Advisor Plan	20			
I-2: Require no more than two inspections for accessory-use solar PV.	Advisor Plan	10	6		
I-3: Offer inspection appointment times in lieu of appointment windows.	N/A	0			
I-4: Make inspection requirements for solar PV available online.	N/A	0			
I-5: Have a fixed time frame between inspection requests and scheduling of inspections of no more than 10 days.	Advisor Plan	10	6		
I-6: Provide an online process for scheduling and responding to inspection requests.	N/A	0			
Total verified points in Inspection		0			
Points pending Advisor Engagement/Review in Inspection		40			
Total proposed points in Inspection		40			

Construction Codes					
Criteria	Addressed in	Points	Month Started	Month Completed	
CC-1a: Develop and provide "solar-ready construction guidelines" for developers to enable lower cost installation of future solar PV installations on buildings within the permitting office and online.	N/A	0			
CC-1b: Earn additional points: Include guidance for solar PV on parking lots and other types of non-traditional structures.	N/A	0			
CC-2: Require or incentivize new construction to be solar ready in order to complete future installations at lower cost.	N/A	0			
CC-3: Offer design guidelines for solar PV aligned with NEC and fire code.	N/A	0			
CC-4: Adopt the most recent ICC codes. Appendix U from the 2015 IRC regarding solar ready construction must be adopted to receive credit.	N/A	0			
Total verified points in Construction Codes		0			
Points pending TA/Review in Construction Codes		0			
Total proposed points in Construction Codes		0			

Solar Rights					
Criteria	Addressed in	Points	Month Started	Month Completed	
SR-1: Conduct review of state policies related to protecting rights of property owners to install solar and solar system owners' right to sunlight on their property. Make this information available to residents.	N/A	0			
SR-2: Provide consumer protection resources on solar PV which help consumers make informed solar PV purchasing decisions.	N/A	0			
SR-3: Develop local process to enable solar rights through a solar access ordinance.	N/A	0			
SR-4: Offer procedure for recording solar easements for property owners.	N/A	0			
SR-5a: Engage homeowners and neighborhood associations and discourage unnecessarily restrictive requirements for solar PV through meetings with leadership.	N/A	0			
SR-5b: Earn additional points: Encourage subdivisions to consider shared solar allowances.	N/A	0			
SR-5c: Earn additional points: Work with HOAs to develop appropriate guideline documents for solar PV.	N/A	0			
Total verified points in Solar Rights		0			
Points pending Advisor Engagement/Review in Solar Rights		0			
Total proposed points in Solar Rights		0			

Utility Engagement					
Criteria	Addressed in	Points	Month Started	Month Completed	
U-1: Review best practices for integrating interconnection with electrical inspections and share best practices with staff.	N/A	0			
U-2: Discuss community or shared solar PV programs with local utility.	N/A	0			
U-3a: Engage and communicate with utility on community goals for solar PV, net metering and interconnection processes.	N/A	0			
U-3b: Earn additional points: Coordinate with regional organization or other local governments to engage utilities.	N/A	0			
U-4: Coordination of utility and city inspections for solar PV, reducing the total number of inspections needed.	N/A	0			
U-5: Launch of and outreach support for utility-provided community solar program.	N/A	0			
Total verified points in Utility Engagement		0			
Points pending Advisor Engagement/Review in Utility Engagement		0			
Total proposed points in Utility Engagement		0			

Community Engagement					
Criteria	Addressed in	Points	Month Started	Month Completed	
CE-1: Active energy task force or working group which meets on at least three times per year.	N/A	0			
CE-2: Create a solar landing page on local government's website with information on community's solar goals and local resources for solar development.	Advisor Plan	10	6	6	
CE-3: Encourage solar PV on non-profit or community facilities through fee waivers, technical assistance or connections to other forms of support.	N/A	0			
CE-4a: Support or host a community-group purchase program (e.g. a Solarize campaign).	N/A	0			
CE-4b: Earn additional points: Design program or create financing support options to encourage low-to-moderate income participation in community solar initiatives.	N/A	0			
CE-5a: Host a solar workshop open to the general public and/or local government staff explaining solar PV opportunities and policies.	N/A	0			
CE-5b: Creation and distribution of educational materials at relevant community events and through local government channels.	N/A	0			
CE-5c: Establish partnerships with local non-profits or organizations on solar PV with multi-year goal or planned initiatives.	N/A	0			
CE-5d: Publicly encourage community solar projects or solar PV projects on community facilities.	N/A	0			
CE-5e: Engage community in robust, on-going discussion around climate, energy or sustainability plans.	N/A	0			
CE-6: Create and publish job training and placement opportunities for solar in coordination with local community colleges.	N/A	0			
CE-7: Conduct feasibility analysis for solar PV on brownfields, landfills, formerly contaminated lands and/or other under-utilized properties.	N/A	0			
CE-8: Install or lease land for solar PV development on brownfields, landfills, formerly contaminated lands and/or other under-utilized properties.	N/A	0			
CE-9: Engage with regional organizations on advancing solar PV policies in the region including, but not limited to unified permitting processes and group procurement opportunities.	N/A	0			
CE-10: Demonstrate activity in state-level conversations regarding solar PV.	N/A	0			
CE-11: Create and/ share an interactive solar map for your community.	N/A	0			
Total verified points in Community Engagement		0			
Points pending Advisor Engagement/Review in Community Engagement		10			
Total proposed points in Community Engagement		10			

Market Development & Finance					
Criteria	Addressed in	Points	Month Started	Month Completed	
MDF-1: Provide resources on active solar installers and/or local incentives for solar PV.	N/A	0			
MDF-2: Make solar PV metrics publicly available.	N/A	0			
MDF-3: Provide information to consumers about different solar PV financing options, including commercial options, such as property-assessed clean energy (PACE) financing.	Points Awarded by Reviewers	5			
MDF-4: Conduct feasibility analysis for solar PV installations on public facilities.	N/A	0			
MDF-5: Install solar PV capacity on local facilities.	N/A	0			
MDF-6a: If applicable, provide PACE financing in your community.	Points Awarded by Reviewers	10			
MDF-6b: Demonstrate that PACE financing has been used to finance solar PV in your community	N/A	0			
MDF-7: Provide local incentives (i.e. permit fee waivers, rebates, or property tax exemptions) or locally-enabled finance (i.e. a revolving loan fund) for solar PV.	N/A	0			
MDF-8: Engage local banks, credit unions, foundations and/or community funds about lending for solar PV projects through in-person meetings, discussions and/or workshops.	N/A	0			
MDF-9: Demonstrate that community's notched per capita capacity is above top 20% of states (>99 watts/person).	N/A	0			
MDF-10: Integrate solar PV with other distributed or emerging technologies such as storage, CHP or electric vehicles in at least one installed or proposed project.	N/A	0			
MDF-11: Demonstrate feasibility analysis or planning for resilient solar technologies for critical facilities and emergency planning such as solar and storage.	N/A	0			
Total verified points in Market Development & Finance		15			
Points pending Advisor Engagement/Review in Market Development & Finance		0			
Total proposed points in Market Development & Finance		15			

Total verified points in Special Focus Categories	15
Points pending TA/Review in Special Focus Categories	50
Total proposed points in Special Focus Categories (verified + pending points)	65



Summary: Verified & Proposed Points		
SolSmart Bronze Prerequisites		
	Completed?	Pending TA/Review?
PR-1: Solar Statement	Done	
P-1: Create and make available an online checklist detailing the steps of your community's solar permitting process.		Pending
PZD-1: Local government has reviewed zoning requirements and removed restrictions intentionally or unintentionally prohibiting PV development. Compile findings in a memo, and commit to reducing barriers to PV during next zoning review.		Pending

SolSmart Silver Prerequisites		
	Completed?	Pending TA/Review?
PZD-2: Allow solar by-right and as an accessory use in all major zones, and implement any zoning ordinance adjustments identified through the zoning review to improve solar-friendliness.		Pending
I-1: Provide cross-training of inspection and permitting staff on solar PV via in-person or online resources.		Pending

SolSmart Gold Prerequisite		
	Completed?	Pending TA/Review?
P-2: Provide a streamlined permitting pathway for small PV systems with turn-around time of no more than 3 days.		Pending

Foundational Categories Points		
	Completed?	Pending TA/Review?
Permitting	0	95
Planning, Zoning, & Development Regulations	0	45
Total Foundational Points	0	140

Special Focus Categories Points		
	Completed?	Pending TA/Review?
Inspection	0	40
Construction Codes	0	0
Solar Rights	0	0
Utility Engagement	0	0
Community Engagement	0	10
Market Development & Finance	15	0
Total Special Focus Points	15	50

Total Verified SolSmart Points	15	Points pending TA/Review	190
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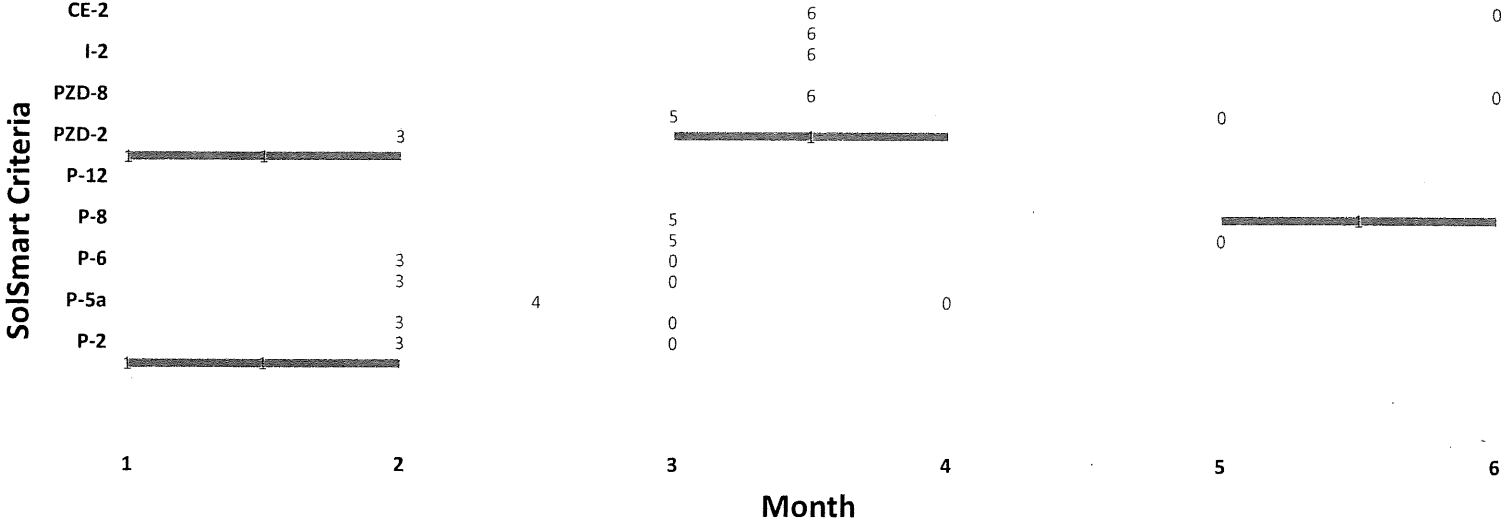
Total Proposed Points	205
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Current Designation Level
None

Pending Designation Level
Gold

Chosen Level of Designation
You have chosen to pursue Silver designation.

Advisor Milestones



Milestones
Instructions
<p>Please use the space below to provide narratives for the milestones shown in the Gantt chart in the previous tab. Use this space to help clarify anything that may not be clear. Note that there should be at least one milestone per month.</p>

Milestone #	Milestone	Date of completion
M-Example	<i>Examples:</i> <ul style="list-style-type: none"><li>• The Advisor will assist the community achieve criteria worth at least 15 points</li></ul> <i>Or</i> <ul style="list-style-type: none"><li>• The Advisor will complete all Bronze prerequisite criteria</li></ul> <i>Or</i> <ul style="list-style-type: none"><li>• The Advisor will complete I-1, CE-2, and MDF-1</li></ul>	
M-1		
M-2		
M-3		
M-4		
M-5		
M-6		

Additional Actions
Instructions
<p>Advisors must work exclusively on actions that directly relate to the achievement of program criteria. However, Advisors are allowed and encouraged to engage in activities that raise awareness about the SolSmart program. This may include activities such as participating in conferences or meeting with representatives from other cities/counties or relevant organizations within your region. In the space provided below, please detail possibilities, if any, that you foresee for an Advisor to conduct outreach during his or her engagement.</p>

<p><i>Example:</i></p> <ul style="list-style-type: none"><li>• We will introduce the Advisor to our colleagues in other cities within our 5-county region.</li><li>• The Advisor can attend a regional workshop in x month to learn more about the region and network and inform others about the tools and techniques deployed to promote solar power in their community.</li></ul>

# **Palm Beach County, FL**

SolSmart Advisor

Host Community Calculator

SolSmart Advisor Host Community Application



Instructions

1) Complete the "Foundational Categories" tab. Add criteria to your Advisor Plan by clicking in the "Addressed in" column and selecting "Advisor Plan." For the criteria that you add to your Advisor Plan, choose which month you will start and complete the action. These actions will appear in the Gantt chart on the "Milestones" tab.

2) Complete the "Special Focus Categories" tab. Add criteria to your Advisor Plan by clicking in the "Addressed in" column and selecting "Advisor Plan." For the criteria that you add to your Advisor Plan, choose which month you will start and complete the action. These actions will appear in the Gantt chart on the "Milestones" tab.

3) Review the "Summary" tab to ensure that you reach your desired level of designation.

4) Review the "Milestones" tab to ensure that the timing of completion is accurate, reflects your intended timeline, and relate to the community's desired level of designation.

5) Complete the "Milestones Narrative" to provide more information or clarify any element.

Choose Your Desired Level of Designation	
Decide whether your community wishes to pursue Bronze, Silver, or Gold designation. This can be changed at any time.	Silver

Foundational Categories: Permitting and Planing, Zoning, & Development Regulations

Solar Statement				
Criteria	Addressed In	Points	Month Started	Month Completed
P-1: A letter indicating commitment to pursuing SolSmart designation and supporting solar development locally. Statement includes: statement of solar goals/areas of focus, past achievements, commitment to tracking metrics, and a commitment of staff time and resources. (Required)	Points Awarded by Reviewers	Requirement Achieved		

Permitting				
Criteria	Addressed In	Points	Month Started	Month Completed
P-1: Create and make available an online checklist detailing the steps of your community's solar permitting process. (Required)	Points Awarded by Reviewers	Requirement Achieved		
P-2: Provide a streamlined permitting pathway for small solar PV systems with turn-around time of no more than 3 days. (Required for Gold)	N/A	0		
P-3: Distinguish between systems qualifying for streamlined or standard review. P-3a: Require no more than one application form for a residential rooftop solar PV project.	N/A	0		
P-5a: Conduct a review of solar permit fees for residential and commercial solar PV.	Advisor Plan	5	3	5
P-5b: Earn additional points: Revise or demonstrate that permit fees reflect national best practices (\$400 or less for residential, and based on cost-recovery for commercial).	N/A	0		
P-6: Review permitting process for efficiency improvements and reduce processing time to 10 days or less.	Advisor Plan	10	1	3
P-7: Adopt a standard solar PV permit form aligned with best practices (e.g. solar ABCs).	N/A	0		
P-8: Train permitting staff on best practices for permitting solar PV and/or solar and storage systems. Training must have occurred within the past five years.	Points Awarded by Reviewers	10		
P-9: Train fire and safety staff on solar PV. Training must have occurred within the past five years.	N/A	0		
P-10: Develop a regular communication schedule to solicit recommendations from the solar installer community regarding procedural changes.	Advisor Plan	10	2	4
P-11: Offer an online process for permitting submission and approval.	N/A	0		
P-12: Make permit data open and accessible to other departments.	N/A	0		
Total verified points in Permitting		10		
Points pending Advisor Engagement/Review in Permitting		25		
Total proposed points in Permitting		35		

Planning, Zoning, & Development Regulations (PZD)				
Criteria	Addressed In	Points	Month Started	Month Completed
PZD-1a: Review zoning requirements and identify restrictions that intentionally or unintentionally prohibit solar PV development. Compile findings in memo. (Required)	Points Awarded by Reviewers	Requirement Achieved		
PZD-1b: Formally present PZD-1a memo findings to planning commission, or relevant body	N/A	0		
PZD-1c: Draft proposed language for changes to zoning code based on PZD-1a memo. Involve planners and/or local zoning experts in the creation of the draft language	Points Awarded by Reviewers	5		
PZD-2: Allow accessory use solar PV by right in all major zones. (Required for Silver and Gold)	Advisor Plan	20	1	6
PZD-3a: Conduct review of existing planning documents and identify new opportunities to integrate solar PV into planning goals.	N/A	0		
PZD-3b: In consultation with planners and other staff, provide draft language on solar PV, which will be proposed for inclusion in existing or future plans. Provide a timeline for when the language will be considered for incorporation into plans.	N/A	0		
PZD-4: Provide clear guidance for solar PV in historic and special use districts.	N/A	0		
PZD-5: Integrate solar PV and/or shared solar into relevant local plans (e.g. energy plan, climate plan, comprehensive plan).	Points Awarded by Reviewers	10		
PZD-6: Include considerations for active and passive solar in development regulations (e.g. providing guidance for orientation of structures in subdivision regulations).	N/A	0		
PZD-7: Provide development incentives for solar PV within subdivision or zoning process or as part of other development incentives (e.g. density or height bonuses and other incentives for buildings which plan to install solar PV).	N/A	0		
PZD-8: Encourage or incentive solar PV development on parking lots, vacant lots, landfills, buffer lands around uses with nuisances (refineries, wastewater plants), brownfields or formerly contaminated lands, airport safety zones (with FAA approval) and non-building structures.	N/A	0		
PZD-9: Training planning staff on best practices in planning and zoning for solar PV. Training must have occurred within the past five years.	N/A	0		
PZD-10a: Ensure that the zoning ordinance clarifies regulations for small ground-mounted solar PV.	N/A	0		
PZD-10b: Ensure that the zoning ordinance establishes a clear regulatory pathway for primary use solar PV (for example through a special use permit or through inclusion among allowed conditional uses).	N/A	0		
PZD-10c: Ensure that the zoning ordinance exempts rooftop solar PV from certain restrictions on accessory uses (e.g. height limits, rooftop equipment screening requirements, or other restrictions).	Advisor Plan	5	1	6
PZD-10d: Ensure that the zoning ordinance exempts small ground-mounted solar PV from certain restrictions on accessory uses (e.g. setbacks, coverage or impervious surface calculations, or other restrictions).	Advisor Plan	5	1	6
PZD-11: Create and provide online a handout for developers that provides an overview of what development regulations allow under which conditions (e.g. types and sizes of solar PV arrays permitted, the processes required, and other relevant information, such as design standards, and policy outside of the zoning language).	N/A	0		
Total verified points in PZD		10		
Points pending TA/Review in PZD		20		
Total proposed points in PZD		30		

Total verified points in Foundational Categories	20
Points pending Advisor Engagement/Review in Foundational Categories	45
Total proposed points in Foundational Categories (verified + pending points)	65

Special Focus Categories: (1)Inspection, (2)Construction Codes, (3)Solar Rights, (4)Utility Engagement, (5)Community Engagement, and (6)Market Development & Finance

Inspection				
Criteria	Addressed in	Points	Month Started	Month Completed
I-1: Provide cross-training of inspection and permitting staff on solar PV via in-person or online resources. Training must have occurred within the past five years. (Required for Silver and Gold)	Points Awarded by Reviewers	20		
I-2: Require no more than two inspections for accessory-use solar PV.	N/A	0		
I-3: Offer inspection appointment times in lieu of appointment windows.	N/A	0		
I-4: Make inspection requirements for solar PV available online.	Advisor Plan	10	1	6
I-5: Have a fixed time frame between inspection requests and scheduling of inspections of no more than 30 days.	Points Awarded by Reviewers	10		
I-6: Provide an online process for scheduling and responding to inspection requests.	Points Awarded by Reviewers	20		
Total verified points in Inspection		50		
Points pending Advisor Engagement/Review in Inspection		10		
Total proposed points in Inspection		60		

Construction Codes				
Criteria	Addressed in	Points	Month Started	Month Completed
CC-1a: Develop and provide "solar-ready construction guidelines" for developers to enable lower cost installation of future solar PV installations on building within the permitting office and online.	N/A	0		
CC-1b: Earn additional points: include guidance for solar PV on parking lots and other types of non-traditional structures.	N/A	0		
CC-2: Require or incentivize new construction to be solar ready in order to complete future installations at lower cost.	N/A	0		
CC-3: Offer design guidelines for solar PV aligned with NEC and fire code.	N/A	0		
CC-4: Adopt the most recent ICC codes. Appendix U from the 2015 IRC regarding solar ready construction must be adopted to receive credit.	Points Awarded by Reviewers	20		
Total verified points in Construction Codes		0		
Points pending TA/Review in Construction Codes		0		
Total proposed points in Construction Codes		20		

Solar Rights				
Criteria	Addressed in	Points	Month Started	Month Completed
SR-1: Conduct review of state policies related to protecting rights of property owners to install solar and solar system owners' right to sunlight on their property. Make this information available to residents.	Advisor Plan	5	3	6
SR-2: Provide consumer protection resources on solar PV which help consumers make informed solar PV purchasing decisions.	Advisor Plan	5	1	6
SR-3: Develop local process to enable solar rights through a solar access ordinance.	Advisor Plan	10	3	6
SR-4: Offer procedure for recording solar easements for property owners.	N/A	0		
SR-5a: Engage homeowners and neighborhood associations and discourage unnecessarily restrictive requirements for solar PV through meetings with leadership.	N/A	0		
SR-5b: Earn additional points: Encourage subdivisions to consider shared solar allowances.	N/A	0		
SR-5c: Earn additional points: Work with HOAs to develop appropriate guideline documents for solar PV.	N/A	0		
Total verified points in Solar Rights		0		
Points pending Advisor Engagement/Review in Solar Rights		20		
Total proposed points in Solar Rights		20		

Utility Engagement				
Criteria	Addressed in	Points	Month Started	Month Completed
U-1: Review best practices for integrating interconnection with electrical inspections and share best practices with staff.	N/A	0		
U-2: Discuss community or shared solar PV programs with local utility.	N/A	0		
U-3a: Engage and communicate with utility on community goals for solar PV, net metering and interconnection processes.	N/A	0		
U-3b: Earn additional points: Coordinate with regional organization or other local governments to engage utilities.	N/A	0		
U-4: Coordination of utility and city inspections for solar PV, reducing the total number of inspections needed.	N/A	0		
U-5: Launch of and outreach support for utility-provided community solar program.	N/A	0		
Total verified points in Utility Engagement		0		
Points pending Advisor Engagement/Review in Utility Engagement		0		
Total proposed points in Utility Engagement		0		

Community Engagement				
Criteria	Addressed in	Points	Month Started	Month Completed
CE-1: Active energy task force or working group which meets on at least three times per year.	N/A	0		
CE-2: Create a solar landing page on local government's website with information on community's solar goals and local resources for solar development.	Advisor Plan	10	1	5
CE-3: Encourage solar PV on non-profit or community facilities through fee waivers, technical assistance or connections to other forms of support.	N/A	0		
CE-4a: Support or host a community group purchase program (e.g. a Solarize campaign).	N/A	0		
CE-4b: Earn additional points: Design program or create financing support options to encourage low-to-moderate income participation in community solar initiatives.	N/A	0		
CE-5a: Host a solar workshop open to the general public and/or local government staff explaining solar PV opportunities and policies.	N/A	0		
CE-5b: Creation and distribution of educational materials at relevant community events and through local government channels.	N/A	0		
CE-5c: Establish partnerships with local non-profits or organizations on solar PV with multi-year goal or planned initiatives.	N/A	0		
CE-5d: Publicly encourage community solar projects or solar PV projects on community facilities.	N/A	0		
CE-5e: Engage community in robust, on-going discussion around climate, energy or sustainability plans.	Points Awarded by Reviewers	5		
CE-6: Create and publish job training and placement opportunities for solar in coordination with local community colleges.	N/A	0		
CE-7: Conduct feasibility analysis for solar PV on brownfields, landfills, formerly contaminated lands and/or other under-utilized properties.	N/A	0		
CE-8: Install or lease land for solar PV development on brownfields, landfills, formerly contaminated lands and/or other under-utilized properties.	N/A	0		
CE-9: Engage with regional organizations on advancing solar PV policies in the region including, but not limited to unified permitting processes and group procurement opportunities.	Points Awarded by Reviewers	20		
CE-10: Demonstrate activity in state-level conversations regarding solar PV.	N/A	0		
CE-11: Create and/ share an interactive solar map for your community.	N/A	0		
Total verified points in Community Engagement		25		
Points pending Advisor Engagement/Review in Community Engagement		10		
Total proposed points in Community Engagement		35		

Market Development & Finance				
Criteria	Addressed in	Points	Month Started	Month Completed
MDF-1: Provide resources on active solar installers and/or local incentives for solar PV.	Advisor Plan	5	3	6
MDF-2: Make solar PV metrics publicly available.	Advisor Plan	5	3	6
MDF-3: Provide information to consumers about different solar PV financing options, including commercial options, such as property-assessed clean energy (PACE) financing.	Advisor Plan	5	1	3
MDF-4: Conduct feasibility analysis for solar PV installations on public facilities.	N/A	0		
MDF-5: Install solar PV capacity on local facilities.	Points Awarded by Reviewers	20		
MDF-6a: If applicable, provide PACE financing in your community.	N/A	0		
MDF-6b: Demonstrate that PACE financing has been used to finance solar PV in your community.	N/A	0		
MDF-7: Provide local incentives (i.e. permit fee waivers, rebates, or property tax exemptions) or locally-enabled finance (i.e. a revolving loan fund) for solar PV.	N/A	0		
MDF-8: Engage local banks, credit unions, foundations and/or community funds about lending for solar PV projects through in-person meetings, discussions and/or workshops.	N/A	0		
MDF-9: Demonstrate that community's installed per capita capacity is above top 20% of states (per capita/person).	N/A	0		
MDF-10: Integrate solar PV with other distributed or emerging technologies such as storage, CHP or electric vehicles in at least one installed or proposed project.	N/A	0		
MDF-11: Demonstrate feasibility analysis or planning for resilient solar technologies for critical facilities and emergency planning such as solar and storage.	N/A	0		
Total verified points in Market Development & Finance		20		
Points pending Advisor Engagement/Review in Market Development & Finance		15		
Total proposed points in Market Development & Finance		35		

Total verified points in Special Focus Categories	115
Points pending TA/Review in Special Focus Categories	55
Total proposed points in Special Focus Categories (verified + pending points)	170

Summary: Verified & Proposed Points		
SolSmart Bronze Prerequisites		
	Completed?	Pending TA/Review?
PR-1: Solar Statement	Done	
P-1: Create and make available an online checklist detailing the steps of your community's solar permitting process.	Done	
PZD-1: Local government has reviewed zoning requirements and removed restrictions intentionally or unintentionally prohibiting PV development. Compile findings in a memo, and commit to reducing barriers to PV during next zoning review.	Done	

SolSmart Silver Prerequisites		
	Completed?	Pending TA/Review?
PZD-2: Allow solar by-right and as an accessory use in all major zones, and implement any zoning ordinance adjustments identified through the zoning review to improve solar-friendliness.		Pending
I-1: Provide cross-training of inspection and permitting staff on solar PV via in-person or online resources.	Done	

SolSmart Gold Prerequisite		
	Completed?	Pending TA/Review?
P-2: Provide a streamlined permitting pathway for small PV systems with turn-around time of no more than 3 days.		

Foundational Categories Points		
	Completed?	Pending TA/Review?
Permitting	10	25
Planning, Zoning, & Development Regulations	10	20
Total Foundational Points	20	45

Special Focus Categories Points		
	Completed?	Pending TA/Review?
Inspection	50	10
Construction Codes	20	0
Solar Rights	0	20
Utility Engagement	0	0
Community Engagement	25	10
Market Development & Finance	20	15
Total Special Focus Points	115	55

Total Verified SolSmart Points	135	Points pending TA/Review	100
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Total Proposed Points	235
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Current Designation Level
None

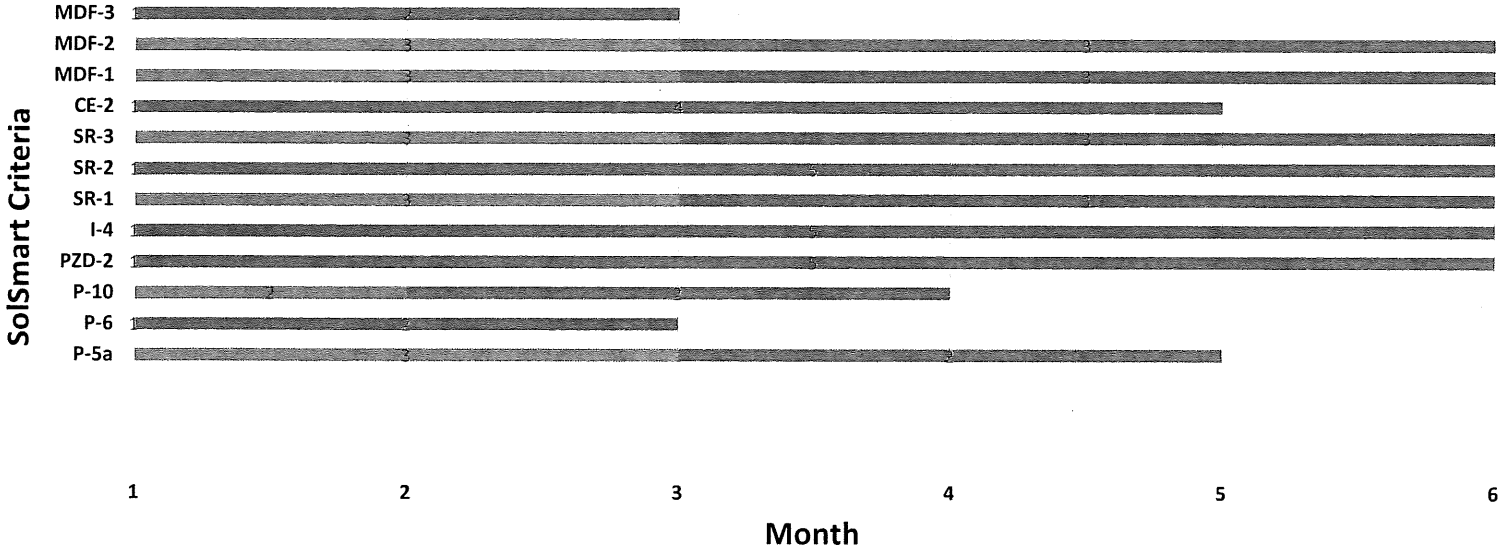
Pending Designation Level
Silver

Your community is close to Gold designation. Consider amending the level of designation on the 'Introduction' tab and pursuing the actions to achieve this level of designation.

Chosen Level of Designation
You have chosen to pursue Silver designation.



Palm Beach County



Milestones
Instructions
<p>Please use the space below to provide narratives for the milestones shown in the Gantt chart in the previous tab. Use this space to help clarify anything that may not be clear. Note that there should be at least one milestone per month.</p>

Milestone #	Milestone	Date of completion
M-Example	<div><div>• The Advisor will assist the community achieve criteria worth at least 15 points</div><div>Or</div><div>• The Advisor will complete all Bronze prerequisite criteria</div><div>Or</div><div>• The Advisor will complete I-1, CE-2, and MDF-1</div></div>	
M-1	<div>• PBC - The Advisor will commence working with the appropriate County staff on P-2, P-5a, P-6, PZD-2, PZD-10c, PZD-10d, I-4, CE-2, SR-2, and MDF-3.</div>	9-Aug-17
M-2	<div>• PBC - The Advisor will commence working with the appropriate County staff on P-10.</div>	9-Sep-17
M-3	<div><div>• PBC - Advisor will complete P-6, MDF-3.</div><div>• PBC - The Advisor will commence working with the appropriate County staff on P-5a, SR-1, SR-3, MDF-1, and MDF-2.</div></div>	9-Oct-17
M-4	<div>• PBC - Advisor will complete SR-2.</div>	9-Nov-17
M-5	<div>• PBC - Advisor will complete P-5a.</div>	9-Dec-17
M-6	<div><div>• PBC - Advisor will complete P-10, PZD-2, PZD-10c, PZD-10d, I-4, SR-1, SR-2, SR-3, MDF-1, and MDF-2.</div><div>• PBC - Advisor will have completed all criteria in helping PBC achieve Silver SolSmart certification status.</div></div>	9-Jan-18

Additional Actions
Instructions
<p>Advisors must work exclusively on actions that directly relate to the achievement of program criteria. However, Advisors are allowed and encouraged to engage in activities that raise awareness about the SolSmart program. This may include activities such as participating in conferences or meeting with representatives from other cities/counties or relevant organizations within your region. In the space provided below, please detail possibilities, if any, that you foresee for an Advisor to conduct outreach during his or her engagement.</p>

<p>Example:</p> <ul style="list-style-type: none"><li>• We will introduce the Advisor to our colleagues in other cities within our 5-county region.</li><li>• The Advisor can attend a regional workshop in x month to learn more about the region and network and inform others about the tools and techniques deployed to promote solar power in their community.</li></ul>	<ul style="list-style-type: none"><li>• PBC will convene a meeting(s) to introduce the Advisor to the County and our municipal partners with whom they will be coordinating.</li><li>• PBC - We will set up an opportunities for the Advisor to learn more about the region and present progress, tools and techniques to members of both the Florida Sustainability Directors Network and the Southeast Florida Regional Climate Change Compact.</li><li>• The Advisor is encourage to participate in remaining meetings to revise and update the Regional Climate Action Plan slated for completion in November 2017.</li><li>• The Advisor is encouraged to attend the Annual Climate Leadership Summit, hosted by Broward County and the South Florida Regional Climate Change Compact, December 14-15, 2017 in Fort Lauderdale, Florida.</li></ul>
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# **West Palm Beach, FL**

SolSmart Advisor

Host Community Calculator

SolSmart Advisor Host Community Application



Instructions

- 1) Complete the "Foundational Categories" tab. Add criteria to your Advisor Plan by clicking in the "Addressed in" column and selecting "Advisor Plan." For the criteria that you add to your Advisor Plan, choose which month you will start and complete the action. These actions will appear in the Gantt chart on the "Milestones" tab.
- 2) Complete the "Special Focus Categories" tab. Add criteria to your Advisor Plan by clicking in the "Addressed in" column and selecting "Advisor Plan." For the criteria that you add to your Advisor Plan, choose which month you will start and complete the action. These actions will appear in the Gantt chart on the "Milestones" tab.
- 3) Review the "Summary" tab to ensure that you reach your desired level of designation.
- 4) Review the "Milestones" tab to ensure that the timing of completion is accurate, reflects your intended timeline, and relate to the community's desired level of designation.
- 5) Complete the "Milestones Narrative" to provide more information or clarify any element.

Choose Your Desired Level of Designation

Decide whether your community wishes to pursue Bronze, Silver, or Gold designation. This can be changed at any time.

Gold

Foundational Categories: Permitting and Planing, Zoning, & Development Regulations

Solar Statement				
Criteria	Addressed in	Points	Month Started	Month Completed
PR-1: A letter indicating commitment to pursuing SolSmart designation and supporting solar development locally. Statement includes: statement of solar goals/areas of focus, past achievements, commitment to tracking metrics, and a commitment of staff time and resources. (Required)	Points Awarded by Reviewers	Requirement Achieved		

Criteria	Addressed in	Points	Month Started	Month Completed
P-1: Create and make available an online checklist detailing the steps of your community's solar permitting process. (Required)	Advisor Plan	Requirement Proposed	1	1
P-2: Provide a streamlined permitting pathway for small solar PV systems with turn-around time of no more than 3 days. (Required for Gold)	Advisor Plan	20	1	1
P-3: Distinguish between systems qualifying for streamlined or standard review.	Advisor Plan	5	1	1
P-4: Require no more than one application form for a residential rooftop solar PV project.	For Review	5		
P-5a: Conduct a review of solar permit fees for residential and commercial solar PV.	Advisor Plan	5	2	2
P-5b: Earn additional points: Revise or demonstrate that permit fees reflect national best practices (\$400 or less for residential, and based on cost-recovery for commercial).	Advisor Plan	5	3	5
P-6: Review permitting process for efficiency improvements and reduce processing time to 10 days or less.	Advisor Plan	10	1	2
P-7: Adopt a standard solar PV permit form aligned with best practices (e.g. Solar ABCs).	Advisor Plan	10	2	4
P-8: Train permitting staff on best practices for permitting solar PV and/or solar and storage systems. Training must have occurred within the past five years.	Advisor Plan	10	3	5
P-9: Train fire and safety staff on solar PV. Training must have occurred within the past five years.	Advisor Plan	10	2	6
P-10: Develop a regular communication schedule to solicit recommendations from the solar installer community regarding procedural changes.	N/A	0		
P-11: Offer an online process for permitting submission and approval.	For Review	20		
P-12: Make permit data open and accessible to other departments.	Points Awarded by Reviewers	20		
Total verified points in Permitting		20		
Points pending Advisor Engagement/Review in Permitting		100		
Total proposed points in Permitting		120		

Planning, Zoning, & Development Regulations (PZD)				
Criteria	Addressed in	Points	Month Started	Month Completed
PZD-1a: Review zoning requirements and identify restrictions that intentionally or unintentionally prohibit solar PV development. Compile findings in a memo. (Required)	Advisor Plan	Requirement Proposed	1	2
PZD-1b: Formally present PZD-1a memo findings to planning commission, or relevant body	Advisor Plan	5	2	3
PZD-1c: Draft proposed language for changes to zoning code based on PZD-1a memo. Involve planners and/or local zoning experts in the creation of the draft language	Advisor Plan	5		
PZD-2: Allow accessory use solar PV by right in all major zones. (Required for Silver and Gold)	For Review	20		
PZD-3a: Conduct review of existing planning documents and identify new opportunities to integrate solar PV into planning goals.	Advisor Plan	5	2	6
PZD-3b: In consultation with planners and other staff, provide draft language on solar PV, which will be proposed for inclusion in existing or future plans. Provide a timeline for when the language will be considered for incorporation into plans.	Advisor Plan	5	4	6
PZD-4: Provide clear guidance for solar PV in historic and special use districts.	Points Awarded by Reviewers	10		
PZD-5: Integrate solar PV and/or shared solar into relevant local plans (e.g. energy plan, climate plan, comprehensive plan).	Advisor Plan	10	1	6
PZD-6: Include considerations for active and passive solar in development regulations (e.g. providing guidance for orientation of structures in subdivision regulations).	Advisor Plan	10		
PZD-7: Provide development incentives for solar PV within subdivision or zoning process or as part of other development incentives (e.g. density or height bonuses and other incentives for buildings which plan to install solar PV).	Advisor Plan	20	2	6
PZD-8: Encourage or incentivize solar PV development on parking lots, vacant lots, landfills, buffer lands around uses with nuisances (refineries, wastewater plants), brownfields or formerly contaminated lands, airport safety zones (with FAA approval) and non-building structures.	N/A	0		
PZD-9: Training planning staff on best practices in planning and zoning for solar PV. Training must have occurred within the past five years.	Advisor Plan	10	3	5
PZD-10a: Ensure that the zoning ordinance clarifies regulations for small ground-mounted solar PV.	Advisor Plan	5		
PZD-10b: Ensure that the zoning ordinance establishes a clear regulatory pathway for primary use solar PV (for example through a special use permit or through inclusion among allowed conditional uses).	Advisor Plan	5		
PZD-10c: Ensure that the zoning ordinance exempts rooftop solar PV from certain restrictions on accessory uses (e.g. height limits, rooftop equipment screening requirements, or other restrictions).	Advisor Plan	5		
PZD-10d: Ensure that the zoning ordinance exempts small ground-mounted solar PV from certain restrictions on accessory uses (e.g. setbacks, coverage or impervious surface calculations, or other restrictions).	Advisor Plan	5		
PZD-11: Create and provide online a handout for developers that provides an overview of what development regulations allow under which conditions (e.g. types and sizes of solar PV arrays permitted, the processes required, and other relevant information, such as design standards, and policy outside of the zoning language).	Advisor Plan	5	2	5
Total verified points in PZD		10		
Points pending TA/Review in PZD		80		
Total proposed points in PZD		90		

Total verified points in Foundational Categories	30
Points pending Advisor Engagement/Review in Foundational Categories	180
Total proposed points in Foundational Categories (verified + pending points)	210

Special Focus Categories: (1)Inspection, (2)Construction Codes, (3)Solar Rights, (4)Utility Engagement, (5)Community Engagement, and (6)Market Development & Finance

Inspection				
Criteria	Addressed in	Points	Month Started	Month Completed
I-1: Provide cross-training of inspection and permitting staff on solar PV via in-person or online resources. Training must have occurred within the past five years. (Required for Silver and Gold)	Advisor Plan	20	4	5
I-2: Require no more than two inspections for accessory-use solar PV.	Advisor Plan	10	2	4
I-3: Offer inspection appointment times in lieu of appointment windows.	N/A	0		
I-4: Make inspection requirements for solar PV available online.	Advisor Plan	10	2	3
I-5: Have a fixed time frame between inspection requests and scheduling of inspections of no more than 10 days.	Points Awarded by Reviewers	10		
I-6: Provide an online process for scheduling and responding to inspection requests.	For Review	20		
Total verified points in Inspection		10		
Points pending Advisor Engagement/Review in Inspection		60		
Total proposed points in Inspection		70		

Community Engagement				
Criteria	Addressed in	Points	Month Started	Month Completed
CE-1: Active energy task force or working group which meets on at least three times per year.	N/A	0		
CE-2: Create a solar landing page on local government's website with information on community's solar goals and local resources for solar development.	Advisor Plan	10	2	6
CE-3: Encourage solar PV on non-profit or community facilities through fee waivers, technical assistance or connections to other forms of support.	N/A	0		
CE-4a: Support or host a community-group purchase program (e.g. a Solarize campaign).	N/A	0		
CE-4b: Earn additional points: Design program or create financing support options to encourage low-to-moderate income participation in community solar initiatives.	N/A	0		
CE-5a: Host a solar workshop open to the general public and/or local government staff explaining solar PV opportunities and policies.	Advisor Plan	5	2	6
CE-5b: Creation and distribution of educational materials at relevant community events and through local government channels.	Advisor Plan	5	2	4
CE-5c: Establish partnerships with local non-profits or organizations or solar PV with multi-year goal or planned initiatives.	N/A	0		
CE-5d: Publicly encourage community solar projects or solar PV projects on community facilities.	Advisor Plan	5	2	5
CE-5e: Engage community in robust, on-going discussion around climate, energy or sustainability plans	For Review	5		
CE-6: Create and publish job training and placement opportunities for solar in coordination with local community colleges.	N/A	0		
CE-7: Conduct feasibility analysis for solar PV on brownfields, landfills, formerly contaminated lands and/or other under-utilized properties.	N/A	0		
CE-8: Install or lease land for solar PV development on brownfields, landfills, formerly contaminated lands and/or other under-utilized properties.	N/A	0		
CE-9: Engage with regional organizations on advancing solar PV policies in the region including, but not limited to unified permitting processes and group procurement opportunities.	N/A	0		
CE-10: Demonstrate activity in state-level conversations regarding solar PV.	Advisor Plan	20	2	2
CE-11: Create and/ share an interactive solar map for your community.	Advisor Plan	20	2	6
Total verified points in Community Engagement		0		
Points pending Advisor Engagement/Review in Community Engagement		70		
Total proposed points in Community Engagement		70		

Construction Codes				
Criteria	Addressed in	Points	Month Started	Month Completed
CC-1a: Develop and provide "solar-ready construction guidelines" for developers to enable lower cost installation of future solar PV installations on buildings within the permitting office and online.	Advisor Plan	10	2	4
CC-1b: Earn additional points: Include guidance for solar PV on parking lots and other types of non-traditional structures.	Advisor Plan	10	2	4
CC-2: Require or incentivize new construction to be solar ready in order to complete future installations at lower cost.	N/A	0		
CC-3: Offer design guidelines for solar PV aligned with NEC and fire code.	Advisor Plan	20	1	2
CC-4: Adopt the most recent ICC codes. Appendix U from the 2015 IRC regarding solar ready construction must be adopted to receive credit.	Advisor Plan	20	1	6
Total verified points in Construction Codes		0		
Points pending TA/Review in Construction Codes		60		
Total proposed points in Construction Codes		60		

Solar Rights				
Criteria	Addressed in	Points	Month Started	Month Completed
SR-1: Conduct review of state policies related to protecting rights of property owners to install solar and solar system owners' right to sunlight on their property. Make this information available to residents.	Advisor Plan	5	1	4
SR-2: Provide consumer protection resources on solar PV which help consumers make informed solar PV purchasing decisions.	Advisor Plan	5	4	4
SR-3: Develop local process to enable solar rights through a solar access ordinance.	Advisor Plan	10		
SR-4: Offer procedure for recording solar easements for property owners.	N/A	0		
SR-5a: Engage homeowners' and neighborhood associations and discourage unnecessarily restrictive requirements for solar PV through meetings with leadership.	Advisor Plan	10		
SR-5b: Earn additional points: encourage subdivisions to consider shared solar allowances.	N/A	0		
SR-5c: Earn additional points: Work with HOAs to develop appropriate guideline documents for solar PV.	Advisor Plan	5		
Total verified points in Solar Rights		0		
Points pending Advisor Engagement/Review in Solar Rights		35		
Total proposed points in Solar Rights		35		

Market Development & Finance				
Criteria	Addressed in	Points	Month Started	Month Completed
MDF-1: Provide resources on active solar installers and/or local incentives for solar PV.	Advisor Plan	5	3	5
MDF-2: Make solar PV metrics publicly available.	Advisor Plan	5	2	6
MDF-3: Provide information to consumers about different solar PV financing options, including commercial options, such as property-assessed clean energy (PACE) financing.	Points Awarded by Reviewers	5		
MDF-4: Conduct feasibility analysis for solar PV installations on public facilities.	N/A	0		
MDF-5: Install solar PV capacity on local facilities.	Advisor Plan	20	2	6
MDF-6a: If applicable, provide PACE financing in your community.	Points Awarded by Reviewers	10		
MDF-6b: Demonstrate that PACE financing has been used to finance solar PV in your community		10	2	3
MDF-7: Provide local incentives (i.e. permit fee waivers, rebates, or property tax exemptions) or locally-enabled finance (i.e. a revolving loan fund) for solar PV.	N/A	0		
MDF-8: Engage local banks, credit unions, foundations and/or community funds about lending for solar PV projects through in-person meetings, discussions and/or workshops.	N/A	0		
MDF-9: Demonstrate that community's installed per capita capacity is above top 20% of states (>99 watts/person).	N/A	0		
MDF-10: Integrate solar PV with other distributed or emerging technologies such as storage, CHP or electric vehicles in at least one installed or proposed project.	N/A	0		
MDF-11: Demonstrate feasibility analysis or planning for resilient solar technologies for critical facilities and emergency planning such as solar and storage.	N/A	0		
Total verified points in Market Development & Finance		15		
Points pending Advisor Engagement/Review in Market Development & Finance		40		
Total proposed points in Market Development & Finance		55		

Utility Engagement				
Criteria	Addressed in	Points	Month Started	Month Completed
U-1: Review best practices for integrating interconnection with electrical inspections and share best practices with staff.	Advisor Plan	5	3	4
U-2: Discuss community or shared solar PV programs with local utility.	Points Awarded by Reviewers	10		
U-3a: Engage and communicate with utility on community goals for solar PV, net metering and interconnection processes.	Advisor Plan	10	1	6
U-3b: Earn additional points: Coordinate with regional organization or other local governments to engage utilities.	Advisor Plan	5	1	2
U-4: Coordination of utility and city inspections for solar PV, reducing the total number of inspections needed.	Advisor Plan	20	2	3
U-5: Launch of and outreach support for utility provided community solar program.	Advisor Plan	20	2	5
Total verified points in Utility Engagement		10		
Points pending Advisor Engagement/Review in Utility Engagement		60		
Total proposed points in Utility Engagement		70		

Total verified points in Special Focus Categories	35
Points pending TA/Review in Special Focus Categories	325
Total proposed points in Special Focus Categories (verified + pending points)	360

Summary: Verified & Proposed Points		
SolSmart Bronze Prerequisites		
	Completed?	Pending TA/Review?
PR-1: Solar Statement	Done	
P-1: Create and make available an online checklist detailing the steps of your community's solar permitting process.		Pending
PZD-1: Local government has reviewed zoning requirements and removed restrictions intentionally or unintentionally prohibiting PV development. Compile findings in a memo, and commit to reducing barriers to PV during next zoning review.		Pending

SolSmart Silver Prerequisites		
	Completed?	Pending TA/Review?
PZD-2: Allow solar by-right and as an accessory use in all major zones, and implement any zoning ordinance adjustments identified through the zoning review to improve solar-friendliness.		Pending
I-1: Provide cross-training of inspection and permitting staff on solar PV via in-person or online resources.		Pending

SolSmart Gold Prerequisite		
	Completed?	Pending TA/Review?
P-2: Provide a streamlined permitting pathway for small PV systems with turn-around time of no more than 3 days.		Pending

Foundational Categories Points		
	Completed?	Pending TA/Review?
Permitting	20	100
Planning, Zoning, & Development Regulations	10	80
Total Foundational Points	30	180

Special Focus Categories Points		
	Completed?	Pending TA/Review?
Inspection	10	60
Construction Codes	0	60
Solar Rights	0	35
Utility Engagement	10	60
Community Engagement	0	70
Market Development & Finance	15	40
Total Special Focus Points	35	325

Total Verified SolSmart Points	65	Points pending TA/Review	505
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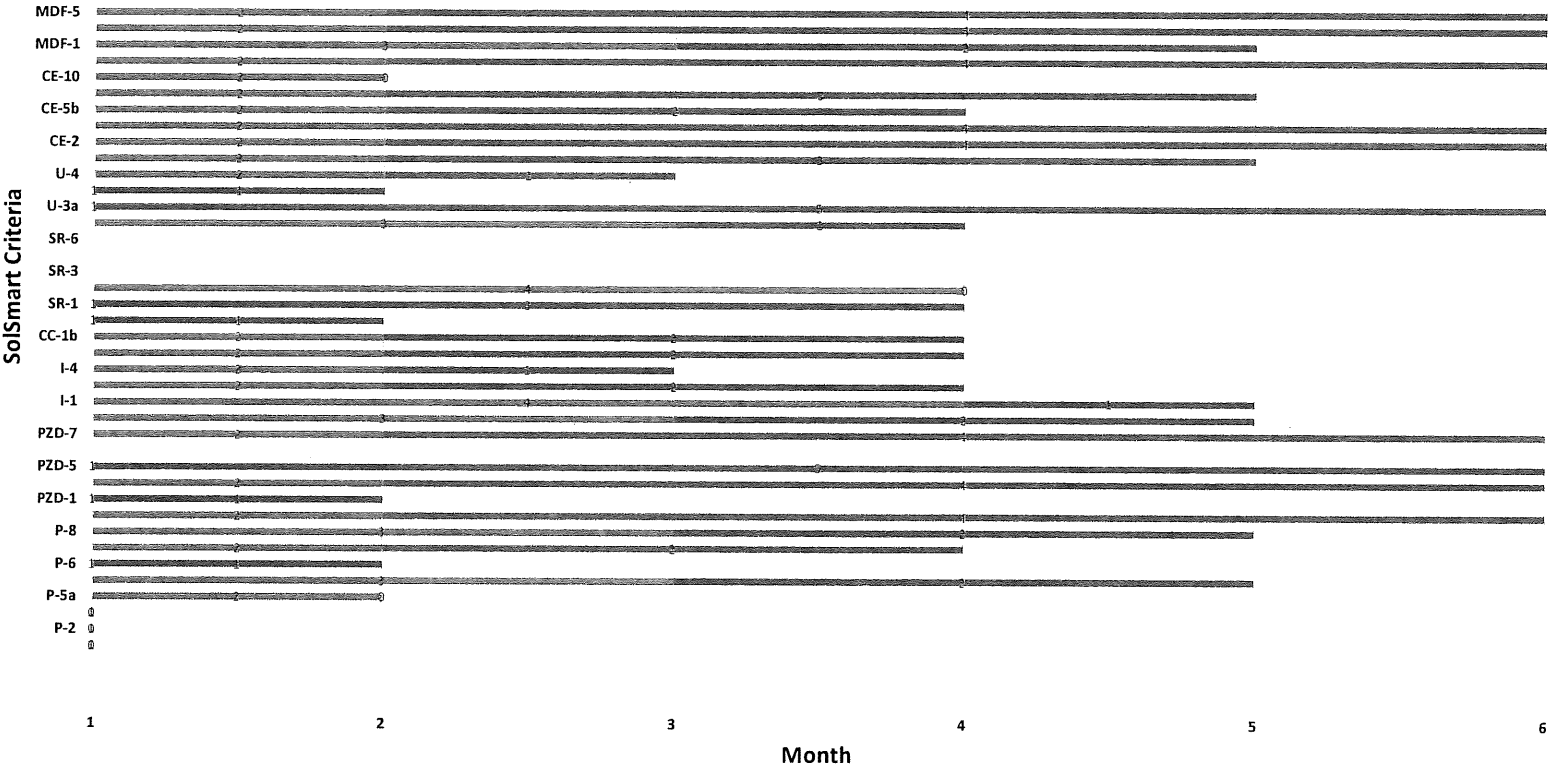
Total Proposed Points	570
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Current Designation Level
None

Pending Designation Level
Gold

Chosen Level of Designation
You have chosen to pursue Gold designation.

West Palm Beach - Advisor Milestones





Milestones
Instructions
<p>Please use the space below to provide narratives for the milestones shown in the Gantt chart in the previous tab. Use this space to help clarify anything that may not be clear. Note that there should be at least one milestone per month.</p>

Milestone #	Milestone	Date of completion
	CE-11: Advisor will work with GIS	Month 5
	CE-10: We participate in this now and Advisor can document activity per requirements.	Month 2
	CE-5b: Advisor to work with Sustainability and Development Services to develop materials.	Month 4
	U3a: We would like to set goals with FPL	Month 6
	SR-2: We plan to add links and resources to our website.	Month 4
	SR-1: We can add general info and state statute to our website.	Month 2
	CC-4: State expected to adopt 2015 codes in December, we can adapt Appendix U.	Month 6
	CC-1b: We have done this for zoo and could do more generally	Month 4
	CC-1a: We can develop PV submission guidelines.	Month 4
	I-4:Advisor to work with building department.	Month 3
	I-2:We want to do this but need to address 3 different inspection points.	Month 4
	I-1:We recently completed training and will need to train new staff.	Month 5
	PZD-1a:Advisor will work with Planning to complete review. We do have state statute that prohibits restrictions on solar.	Month 2
	P-8:We will need to train new staff.	Month 4
	P-7:We use a standard form from the County. We can research to see if it meets best practices.	Month 4
	P-6:Building Department thinks we are meeting this but we could analyze timelines to confirm.	Month 2
	P-5b:We currently have high fees but could modify. This may need to go to Commission.	Month 5
	P-5a:Advisor to review.	Month 2
	P-3: This will be addressed by meeting P-1 and P-2	Month 1
	P-2: Building Department can re-route review to meet this requirement.	Month 1
	P-1: We can detail this on our website - Building Department can help.	Month 1
	PZD-1b:Advisor will work with Planning to complete.	Month 3
	PZD-2:This is allowed based on Florida statute. Please review for confirmation.	NA
	PZD-3a:We plan to add to new "Climate and Resiliency" camp plan element. Advisor will work with Mayor's Office of Sustainability to complete.	Month 6
	PZD-3b:Plan to meet with camp plan review schedule and draft language. See 3a.	Month 6
	PZD-5: This will be incorporated into Sustainability Action Plan.	Month 6
	PZD-7:Advisor will work with Planning to evaluate.	Month 6
	PZD-9:Advisor will work with Planning to complete.	Month 3
	PZD-11:We can post a handout on approval process, best practices, and resources online.	Month 5
	I-6: Please review for completion using link here: <a href="http://onestopshop.wpbgov.com/eGovPlus/entity/login_main.aspx">http://onestopshop.wpbgov.com/eGovPlus/entity/login_main.aspx</a> .	NA
	P-11: Please see link: <a href="https://digitalplans.wpb.org/ProjectDox/">https://digitalplans.wpb.org/ProjectDox/</a>	NA
	P-4: We use a County form. Please see: <a href="http://wpb.org/getmedia/810693b9-fb30-4886-b7b3-388b8a57aa42/Permit-Application-Form;?disposition=attachment">http://wpb.org/getmedia/810693b9-fb30-4886-b7b3-388b8a57aa42/Permit-Application-Form;?disposition=attachment</a>	NA
	Innovation: potential points for solar incentive district, economic grant program (which awards more money when businesses implement green initiatives, tax breaks for solar, pre-approved solar system (would need state approval).	Month 6
	P-9:Advisor will work with Building Department and Fire Department to complete training.	Month 6
	CC-3: We can add solar to existing guidelines.	Month 2
	CE-2: Advisor will work with Mayor's Office of Sustainability to complete.	Month 6
	CE-5a: Advisor will work with Mayor's Office of Sustainability and Development Services to complete.	Month 6
	CE-5d: Advisor will work with Mayor's Office of Sustainability to complete.	Month 5
	MDF-1: Advisor will complete in conjunction with solar map with assistance from GIS and FPL as needed.	Month 6
	MDF-2:Advisor will complete in conjunction with solar map with assistance from GIS and FPL as needed.	Month 6
	MDF-5:Solar installation planned for train station, solar trees, etc.	Month 3
	MDF-6b:To date there is one project that has used PACE for solar.	Month 4
	U-1:We do this now, just need to document, working with Building Department	Month 6
	U-3a: City will work with FPL on this.	Month 2
	U-3b: Southeast Florida Regional Climate Change Compact should meet requirements.	Month 3
	U-4: We do this now but need to document.	Month 5
	U-5: Solar projects in the works could count toward this item.	NA
	PZD-1c:Please review for completion using state statute.	NA
	PZD-6:Please review for completion using state statute.	NA
	PZD-10a-d:Please review for completion using state statute.	NA
	SR-2:We can post this to our website.	Month 4
	SR-5a: Please review for completion using state statute.	NA
	SR-5c:Please review for completion using state statute.	NA
	CE-5e:Please review based on additional info sent.	NA

Additional Actions
Instructions
Advisors must work exclusively on actions that directly relate to the achievement of program criteria. However, Advisors are allowed and encouraged to engage in activities that raise awareness about the SolSmart program. This may include activities such as participating in conferences or meeting with representatives from other cities/counties or relevant organizations within your region. In the space provided below, please detail possibilities, if any, that you foresee for an Advisor to conduct outreach during his or her engagement.
<p>Example:</p> <ul style="list-style-type: none"><li>• We will introduce the Advisor to our colleagues in other cities within our 5-county region.</li><li>• The Advisor can attend a regional workshop in x month to learn more about the region and network and inform others about the tools and techniques deployed to promote solar power in their community.</li></ul>