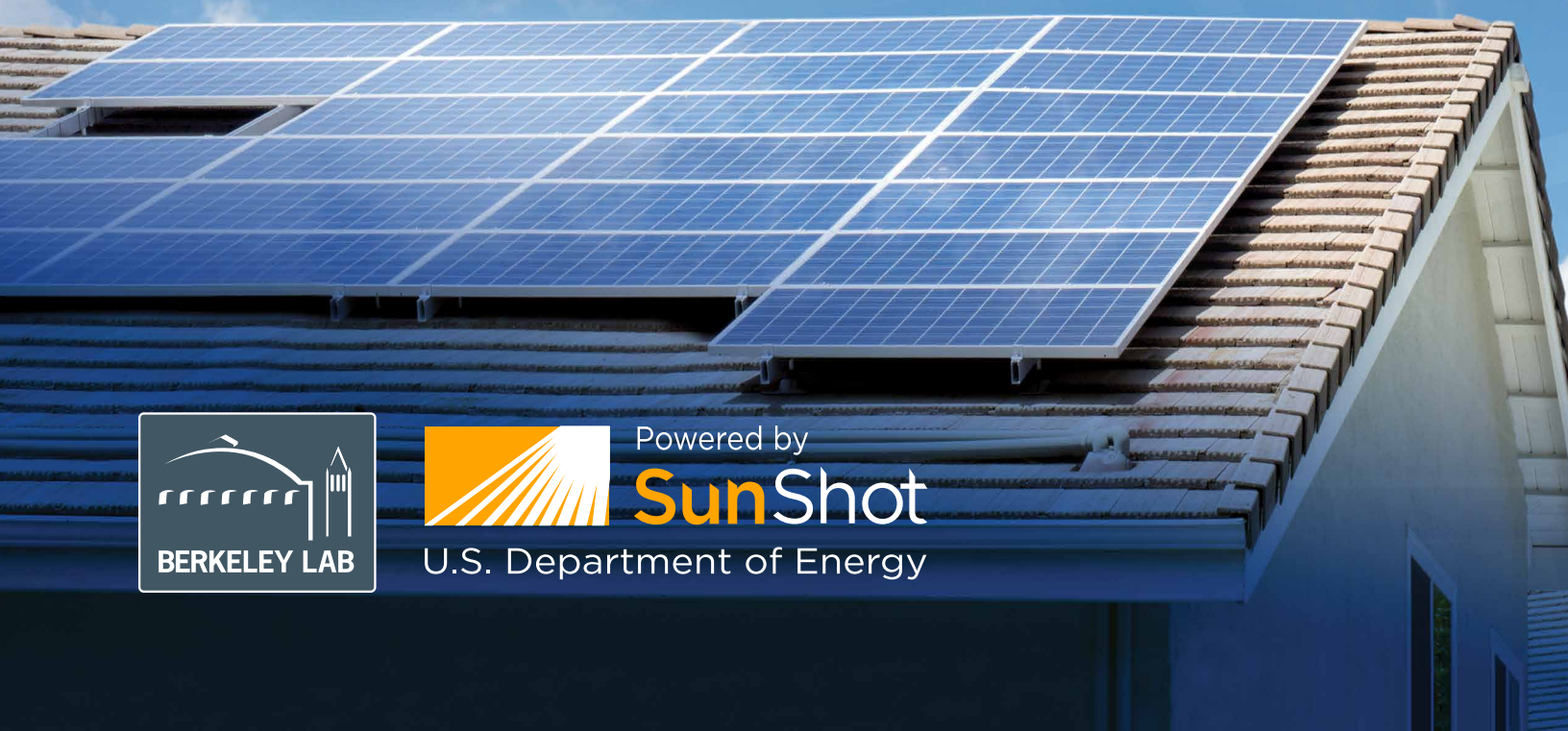# JOURNEY LEADER EXERCISES
Capturing the Sun:

A Roadmap for Navigating Data-Access Challenges and Auto-Populating Solar Home Sales Listings

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Journey Leader Exercise:
Landscape Assessment

As part of the Roadmap, Journey Leaders or other readers should complete a local landscape assessment for each section of the Guidepost. Use these guiding questions as a starting place to complete the worksheet.

Solar Marketplace

The number of solar homes and how that has changed in the last one to two years
The density of solar homes compared with all residential homes by ZIP code or town
The names and contact information of the largest solar installers
The range of ages and sizes in kWh of installed solar systems
The frequency of homeowner-owned, TPO, and PACE-financed systems

Implementation Environment

Local MLS: _____   Decision-making model: _____

Size: _____   Training and communication model:

Footprint: _____   _____

Ownership: _____   MLS software vendor: _____

Governance: _____   Tax data record aggregator: _____

Also consider exploring the roles of appraisers, lenders, and underwriters. How many appraisal offices exist? How many are "green" accredited? Do banks offer loans for solar upgrades? What supporting documentation do underwriters expect?

MLS Data Syndication Process

Local MLS: _____

Current method for listing solar systems: _____

Are any data currently auto-populated?

Tax data
Neighborhood/school data
Walk Score
Mortgage rates
Other

Does the MLS direct syndicate listing data to portals?

Zillow and Trulia
Realtor.com
Other

Solar Valuation Process

Where do appraisers find the data needed to complete an appraisal on a home with a solar system? _____

What tools do appraisers use when valuing homes with solar systems? _____

Is the underwriting process any different for these homes? _____

Preliminary Journey and Resources

Who might serve as Journey Leader: _____   Value to stakeholders and the Journey Leader:

Vision: _____   _____

Time frame: _____   Potential funding mechanisms:

Goals: _____   _____

Journey Leader Exercise:
Solar Data Assessment

As part of the Roadmap, Journey Leaders should complete a solar data assessment. Use the template below as a starting place to assess the data sources in your local context.

Information about the data			Data available to be entered in RESO fields?					
Data Source	Data	Public or Private?	Address of Solar Home	Ownership/ Financing Type	Size of System	Year Installed	kWh/ year Estimated	kWh/ year Actual
Publicly Recorded Data – Property-Specific								
	Permits							
	UCC filings							
Publicly Recorded Data – Anonymized								
	Interconnection applications							
	Incentive program data							
Non-Public Data – Private Market								
	Financing data							
	Installer data							

Journey Leader Exercise:
Data-Access Assessment

Use the worksheet template below as a starting place to assess the data-access landscape in your area.

What data?	What prevents the MLS from having access today?	What helps to allow MLS access today?
Permits		
UCC filings		
Interconnection applications		
Incentive program data		
Financing data		
Installer data		

Journey Leader Exercise:
Barrier Busters

As part of the Roadmap, Journey Leaders should complete an assessment for each section of the Guidepost. Based on the previous data-access assessment, think through what barrier buster strategies might be available. Consider the best possible outcomes and measurable impact for each strategy input.

What data?	Barrier buster to consider	What barrier buster initiative might help?
Permits	V: Best practices for local governments	
Permits	VI: Data mashup	
UCC Filings		
Interconnection Applications		
Incentive Program Data		
Incentive Program Data	I: Opt-in/opt-out consent	
Financing Data	V: Best practices for local governments	
Installer Data	II: Contract consent clauses	

Journey Leader Exercise:
Your Local Pathway Reflection

A. **Is there a journey underway? Or is your area exploring?**

B. **What are the two most significant advantages and barriers in your market environment?**

Advantages	Barriers
1.	1.
2.	2.

C. **What are the two most significant advantages and barriers in the implementation environment?**

Advantages	Barriers
1.	1.
2.	2.

D. **What are the two most significant advantages and barriers in the data environment?**

Advantages	Barriers
1.	1.
2.	2.

E. **What are the two most significant advantages and barriers in the regulatory environment?**

Advantages	Barriers
1.	1.
2.	2.

F. **Overall, rank all the advantages from the most helpful (#1) to the least helpful (#8). Enter in order in the table below.**

Advantages
1.
2.
3.
4.
5.
6.
7.
8.

A. **Overall, rank all the barriers from the most challenging (#1) to the least challenging (#8). Enter in order in the table below.**

Barriers
1.
2.
3.
4.
5.
6.
7.
8.

B. **There are three suggested pathways to auto-population implementation. Based on your actual or expected advantages balanced against the barriers, which of the pathways seems most appealing?**

- Direct to MLS
- Publicly funded repository
- Solar industry collaborative repository

1. Why?

2. What challenges/opportunities will this approach satisfy?

3. What challenges/opportunities will this approach not address?

4. How did you resolve the balance between what could be satisfied and what cannot?

5. What are the next three key things that would have to happen in your market to start moving forward on this pathway?