**Template: Contract Disclosure Checklist**

Registered Project Managers and subcontractors, partners or affiliates working as agents of Project Managers are authorized to use this Disclosure Checklist template.

**INSTRUCTIONS:**

This Disclosure Checklist (“Checklist”) must be completed and provided to all potential Participants when they are presented with a contract. The Checklist is already incorporated into the contract templates for low-income and residential Participants.

The basic formatting of this document must remain as-is and at least a 10-point font must be maintained. The Project Manager may add its logo, if desired

* Text in plain font in this template is unalterable.
* Text in **[ALL CAPS AND BOLD IN SQUARE BRACKETS]** indicates blanks to be filled in when finalizing the contract.
* Text in **{bold in curly brackets}** accompanied by **OR** indicates a selection must be made from a set of options. After a selection has been made, the text in **{bold in curly brackets}** that does not apply may be deleted.
* Text in ***bold italics*** indicates a mandatory provision the contract must meet or exceed. Guidelines are provided on what must be included.
* Text in *italics* is purely instructional and may be deleted.

When preparing this form for a Participant, these instructions should be deleted. This checklist must be completed and provided to the customer in a language they can understand. Spanish and Russian language versions of this template are available in the Resources section of the Program website at [oregoncsp.org.](http://www.oregoncsp.org/)

**Oregon Community Solar Program   
Contract Disclosure Checklist**

This Disclosure Checklist form is part of your Oregon Community Solar Program Subscription Contract and describes the key terms of your **{subscription} OR {ownership interest}** in a community solar project. Read this document and the rest of your Contract carefully so that you fully understand the costs, benefits and risks of participation.

At the end of this document, your will find a checklist of key contract terms that Project Managers are required to disclose. You can use the checkboxes to indicate you have reviewed each term, and you or your Project Manager can note on which pages an item is addressed. Completing this checklist is recommended but not required.

For information about the Oregon Community Solar Program, including customer eligibility criteria, low-income participation resources and the Project Manager Code of Conduct, visit the Program website at [oregoncsp.org](http://www.oregoncsp.org).

If you have questions or complaints related to your community solar contracting experience, you should work with your Project Manager to resolve your concerns. If you are unable to resolve a problem with your Project Manager, you may contact the Community Solar Program Administrator by emailing [info@oregoncsp.org](mailto:info@oregoncsp.org) or by calling 1-800-481-0510.

**Questions or concerns?**

Contact your Project Manager by calling **[PROJECT MANAGER CUSTOMER SERVICE NUMBER]**, emailing **[PROJECT MANAGER CUSTOMER SERVICE EMAIL]** or writing to **[PROJECT MANAGER CUSTOMER SERVICE MAILING ADDRESS]**.

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| **Disclosure Checklist** | |
| **PARTICIPANT INFORMATION** | **PROJECT MANAGER INFORMATION** |
| Name: **[NAME]\***  Site Address: **[SITE ADDRESS ASSOCIATED WITH SUBSCRIPTION]**  Phone: [**PHONE] □ cell □ home**  Email address: **[EMAIL]**  Utility: **{PGE, PAC OR IDP}**  Account Number: **[UTILITY ACCOUNT #]**  Preferred method of contact for notifications:  **□ phone □ email □ mail □ text** | Project Manager: **[PROJECT MANAGER BUSINESS NAME]**  Address: **[BUSINESS ADDRESS]**  Form prepared by: **[FIRST AND LAST NAME AND, IF AN AGENT/PARTNER OF PROJECT MANAGER, BUSINESS NAME]**Phone: **[CUSTOMER SERVICE PHONE]**  Email: **[CUSTOMER SERVICE EMAIL]**  **{Website: [WEBSITE IF AVAILABLE]}** |

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| **COMMUNITY SOLAR PROJECT INFORMATION** | | | | |
| Project Name: **[List project Name]**  Project location(s): **[list addresses of all systems part of this project]**  Estimated total size of the project is **[KW]** kW-AC  Estimated total production of the project in the first year: **[KWH]** kWh  Estimated annual decrease in the production of the project due to aging: **[degredation]** % per year  **{Estimated}** date the project **{will begin} OR {started}** operation: **[MM/DD/YYYY]**  Estimated project lifetime: **[LIFE IN YEARS]** years | | | | |
| **YOUR SUBSCRIPTION** | | | | |
| You **{own} OR {lease}** part of the Project for the term of the Contract (your **“Subscription”**).  Size of your Subscription: **[KW]** kW-AC  Estimated production of your Subscription in the first year: **[KWH]** kWh  Estimated total production of your Subscription over the term of the contract: **[KWH]** kWh | | | | |
| **ONGOING PARTICIPATION PAYMENTS** | | **UP-FRONT PAYMENTS** | | |
| *Write “Does not apply” if there are no ongoing payments.*  **{Price per kWh generated: [KWH RATE] /kWh**  **Your payment each month will be this price multiplied by the amount of electricity generated by your Subscription}**  **OR**  **{Fixed monthly payments of $[MONTHLY PRICE]}**  **OR**  **{*Describe monthly amount and factors that determine that payment*}**  Your first monthly payment is due on **{MONTH OR the first billing month after the Project begins operating}.**  Your **{Price per kWh OR monthly payment}** will **{remain the same for the term of this Contract OR increase each year by [ANNUAL INCREASE]%}.**  These payments will be collected **{on your utility bill} OR {*describe approved alternative collection method}.*** | | *Write “Does not apply” if there are no up-front payments.*  Amount due at **{[DATE]} OR {*milestone*}**: $**[$]**  ***{Add lines as necessary to identity additional payments}*** | | |
| **TERM** | | **FEES AND OTHER CHARGES** | | |
| The initial term of your Contract is **[YEARS]** years **{and [MONTHS] months}.** | | If you cancel your Contract early, you **{will** **not be charged a fee} OR {will be charged a fee of $[FEE]}**.  A Program Fee of $**[PROGRAM FEE]**/kW will be deducted from your Bill Credit every month.  *List all other fees/charges and their amounts, including: subscription transfer fees, late payment fees and all other fees or charges that may apply. If a fee is $0, it does not need to be listed here.* | | |
| **BILL CREDIT** | | | | |
| Your utility will provide you with bill credits for the electricity generated by your Subscription.  Participants of this project will receive a Bill Credit Rate of $**[BILL CREDIT RATE]**/kWh.  In the first year of the operation of this project, your Subscription may generate a total Bill Credit of $**[ BILL CREDIT RATE x ESTIMATED FIRST YEAR PRODUCTION IN KWH]**.  The actual amount of your Bill Credit may differ from this estimate due to natural variations in solar resource and the actual performance of the system over time. | | | | |
| **FINANCIAL SAVINGS GUARANTEE** | | | | |
| **{This Contract does not guarantee savings.} OR {This Contract guarantees [*describe savings guarantee*], as detailed in your Contract.}** | | | | |
| **CHECKLIST OF CONTRACT TERMS**  This is a checklist of key contract terms that your Project Manager is required to disclose to you. You or your Project Manager can note on which pages and sections a term is addressed and you can use the checkboxes to track that you have reviewed each item. Completing this checklist is recommended but not required. | | | | | |
| Image result for checkmark | | **Contract Item** | | **Page Number** | **Section Number** |
| **□** | | One-time and ongoing participation costs | |  |  |
| **□** | | Benefits or savings from participation | |  |  |
| **□** | | Schedule of fees and credits for each year of your contract term | |  |  |
| **□** | | Length of your contract and options at the end of the term | |  |  |
| **□** | | Process and fee for cancelling your Subscription early | |  |  |
| **□** | | Ability and cost to transfer your Subscription to another customer | |  |  |
| **□** | | What happens if you move | |  |  |
| **□** | | The process and cost for changing the size of your Subscription | |  |  |
| **□** | | Explanation of renewable energy credits | |  |  |
| **□** | | How disputes are resolved | |  |  |
| **□** | | Your three-day right to cancel the contract | |  |  |
| **□** | | Data privacy and security | |  |  |
| **□** | | Release of your electric utility information | |  |  |
| **□** | | How you will be notified about the status of the Community Solar Project | |  |  |
| **□** | | Warrantees and performance guarantees | |  |  |
| **□** | | What happens if the Community Solar Project goes offline or stops operating | |  |  |

By initialing, you acknowledge that you have received and reviewed this Disclosure Checklist and that the person signing has full authority to enter into this agreement on behalf of all name account holders for the Account Number identified in this agreement.

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| Participant Initials | Date | Project Manager Representative Initials | Date |