



# ROOF SOLAR ORIGINATION & EARLY DILIGENCE

Project Life Cycle – Systematic process from opportunity identification through go/no-go decision

● PHASE 1.0 PROCESS FLOW

**ORIGINATION TEAM – ROLES & RESPONSIBILITIES**

- › Find & initiate roof solar opportunities through active market channels
- › Uncover and manage client objectives; identify all key stakeholders
- › Present opportunities internally for preliminary approval & diligence
- › Secure pertinent client data to develop project scope & technical parameters
- › Hands off project control at development start; remains in relationship management role

**DEVELOPMENT TEAM – ROLES & RESPONSIBILITIES**

- › Assemble design team for onsite visit (sub-consultant agreements)
- › Schedule, analyze & collaborate on site visit(s) and diligence report
- › Develop initial project scope and Preliminary Design Basis (PDB)
- › Validate PDB internally & externally; develop and review cost estimate
- › Participate in Go/No-Go decision, revisions & final opportunity adjustments

**STREAM 1 – ORIGINATION & INITIATION**  
OPPORTUNITY IDENTIFICATION THROUGH LOI

- 1 IDENTIFY THE OPPORTUNITY**  
 Generate leads via channels and market contacts  
 LANDGATE ORIGINATION
- 2 DESKTOP ANALYSIS**  
 Identify owner, estimate available rooftop / carport area(s)  
 GOOGLE EARTH LANDGATE
- 3 GATHER OWNER INFORMATION**  
 Annual/monthly usage, 15-min interval data, utility ID, electrical & structural plans  
 ORIGINATION / DEV-TECH
- 4 DESKTOP UTILITY HOSTING CAPACITY**  
 Utility rules for solar BTM; max-size feedback; IX pre-application filed  
 LANDGATE DEV-TECH
- 5 DEVELOP INITIAL HELIOSCOPE / PVSYS MODELS**  
 Initial layout & yield; 15-min interval data; 25-year production; module & inverter ID  
 HELIOSCOPE PVSYS DEV-TECH
- 6 DEVELOP INITIAL ESTIMATE**  
 Available rooftop area estimation using Excel templates  
 COST ESTIMATE DEV-TECH

**STREAM 2 – ROOF & ELECTRICAL ASSESSMENT**  
SITE VISIT THROUGH DILIGENCE REPORT

- A SITE VISIT & DRONE FLIGHT**  
 Execute site visit per SOW; drone mapping for large / complex roofs as required  
 DRONE MAPPING APP JV LEADERSHIP + 3RD PARTY ENG
- B REVIEW ROOF ASSESSMENT FOR ELCC**  
 Roof structure composition (beams, columns, joists); LL/DL loading; under-roof loads; ELCC & point loading restrictions  
 STRUCTURAL APPS 3RD PARTY + DEV-TECH
- C ELECTRICAL SYSTEM – IX ASSESSMENT**  
 MV & HV switchgear (bus bar); IX POI location & equipment; transformer assessment  
 ELEC APPS 3RD PARTY + DEV-TECH
- D DEVELOP DILIGENCE REPORT**  
 Collaborate on format; annotate restrictions & risk remediation issues  
 DILIGENCE REPORT 3RD PARTY + DEV-TECH
- E REVIEW & REVISE DILIGENCE REPORT**  
 Agree on format (Word/PPT); tech issues annotated & simplified for owner presentation  
 JV LEADERSHIP + DEV-TECH + 3RD PARTY

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**SECURE INITIAL CONSENSUS / APPROVALS**

Letter of Intent (LOI) from owner or internal stakeholders

LOI DEV-TECH

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**ESTABLISH 3RD-PARTY ASSESSMENT SCOPE**

Statement of Work for complete due-diligence site visit and findings report

SCOPE / SOW DEV-TECH

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**SCHEDULE ROOF & ELECTRICAL ASSESSMENT**

Develop timetable; coordinate 3rd-party with owner contact

ASSESSMENT SCHEDULE

**DILIGENCE REPORT – KEY COMPONENTS**

REQUIRED DELIVERABLES WITHIN THE FINDINGS DOCUMENT

**ROOF CHECKLIST ASSESSMENT**

Comprehensive structural condition &amp; solar suitability checklist

**NFPA 1 CODE REVIEW**

Code requirements applicable to PV siting on rooftops

**PRELIMINARY SYSTEM SIZING**

Helioscope &amp; PVSyst models – initial layout &amp; energy yield

**STRUCTURAL ASSESSMENT**

Engineering drawings review (Phase 1) – loading analysis

**RISK IDENTIFICATION & ANALYSIS**

Project-specific risks with recommended remediation pathways

**INITIAL BUDGET ESTIMATE**

Preliminary project cost with key assumptions documented

**PERMITTING MATRIX**

Jurisdiction-specific permit requirements and approval timeline

**NEXT STEPS & RECOMMENDATIONS**

Actionable path forward with owner presentation framework

**GO / NO-GO DECISION #1**

REVIEW CRITERIA &amp; PHASE GATE

**DECISION REVIEW CRITERIA**

- All due diligence findings reviewed and agreed
- Design basis validated internally & externally
- Project objectives aligned with client & team
- Financial expectations & term sheet reviewed
- Proposal development & presentation ready

**OUTCOMES****YES – ADVANCE TO PHASE 2.0**

Project development begins; owner contact next steps confirmed

**NO – REVISE & REASSESS**

Return to diligence report review; address identified gaps

ON APPROVAL · NEXT PHASE

**ADVANCE TO PHASE 2.0 – PROJECT DEVELOPMENT**

Scope &amp; PDB Confirmed

Cost Estimate Validated

Client Aligned

Team Assembled