GJGNY Outreach Activities

1. CBO Training

2. SharePoint Site Development

3. Programmatic Coordination
   - Access to NYSERDA databases
   - Aggregation Pilot preparation

4. Templates and Tools
CBO Training

- Two, 2-day training sessions
  - November 30 and December 1 – Upstate
  - December 12 and 13 – Downstate

- Presentations by
  - Program staff
  - Training and Implementation Contractor (CSG)
  - CBOs
  - EFS – Financing
  - Marketing Contractor (Brand Cool)
  - Others - Consumer Advocate, NYSDPS UnWaste Program

- SharePoint walkthrough

- Distribution of manuals, tools, contact lists
CBO Training - Agenda

• CBO Roles and Responsibilities

• GJGNY Programs Components
  – Home Performance with ENERGY STAR® and Assisted HPwES
  – EmPower Program
  – Small Commercial/NFP
  – NYSERDA’s Multifamily Performance Program
  – Workforce Development
  – Financing Components

• Paperwork for Outreach
  – GJGNY Audit Application
  – NYSERDA Residential Loan Information
Agenda continued….

• Prescreening Tools (need for energy efficiency work and willingness and ability to finance retrofits)
  – Home Performance Audits
  – Customer Financial Prescreening

• CBO Point of View – outreach strategies, target populations, partners

• Market Research Overview

• Marketing Materials for the CBOs

• Program policies and performance standards
  – Attribution Guidelines
  – NYSERDA Social Media policy
The SharePoint site will become a critical tool for the implementation of the GJGNY Outreach Program.

CBOs will use SharePoint to:
- access documents
- download program information and materials
- Upload leads for match with NYSERDA’s system – supports performance payment
- Upload monthly reports
- Calendar
- Links (CBO sites, NYSERDA links, EFS, etc)
- Directory of Contacts
- converse with NYSERDA and other CBOs
  - about the program and its deployment
  - What’s working
  - Best practices
SharePoint Home Page
### Residential Referrals - New Item

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**SharePoint – CBO leads**

![Image of SharePoint interface](image-url)
Programmatic Coordination

• Matching CBO leads with audits, retrofits and workforce activity
  - CHRIS access for CBOs
  - MPP – leads to NYSERDA program staff
  - Workforce

• Aggregation Pilot
  - Participating Contractor Addendum
Templates and Tools

Developed:

1. Common CBO Reporting Template
2. Common CBO Invoice
3. Screening tools
1. General GJGNY Marketing Elements
   • Collateral - Contractor Recruitment, Financing Fact Sheets, Homeowner Case Studies
   • Contractor related – direct mail, Becoming a BPI-Contractor brochure
   • Print Ad
   • Small Business email (for use by SB auditing contractor)

2. CBO Foundational Tools – initial set of tools
   • Case Studies
   • General Marketing brochure
   • FAQ’s
   • Website copy
   • Social Media content
We want you to be able to talk about your work with NYSERDA right away.
Overall look and feel is clean & simple, allows CBOs to customize to their individual brand.

Co-branded with NYSERDA

Certain sections are editable in Word, so CBOs can add approved info about their organization, your logo and contact info.
Entire case study is provided in Word, so CBOs can create content specific to their homeowner.

Spaces for CBO to place logo, contact info & approved info about your organization.
Upcoming Activities

1. Complete Contracts with CBOs selected from RFP2327
   - Northwest Bronx Community and Clergy Coalition
   - Civic Association Serving Harlem
   - Make the Road New York
   - Neighborhood Housing Services of Jamaica, Inc.
   - Pathstone (contract modification)

2. Finalize Aggregation Pilot groundwork

3. CBO Webinars
   - Solar Thermal
   - Utility Integration
   - Marketing
   - SharePoint Features