

MARKETING AND IMPLEMENTATION PLAN

Inclusive Community Solar Adder



Contractors must use this form to submit their Marketing and Implementation Plan for the Inclusive Community Solar Adder. Contractors will also be required to submit back-up documentation as part of this form.

PART A: PROJECT DETAILS

NY-Sun Project ID: _____

System Size (kW): _____

Eligible Subscriber Target (select one) Note: this selection must match the target selected in the ICSA application.

- 20%-40% 40%-60% 60%-80% 80%-100%

Indicate which subscriber mix will be used for the Inclusive Community Solar Adder (select one)

- Eligible Residential Subscribers Eligible Residential and Eligible Non-Residential Subscribers

Indicate which method you will use to confirm the eligibility of residential subscribers for the ICSA (select one)

- Categorical Eligibility:** Subscriber eligibility is demonstrated by documented participation in one of the assistance programs listed in the Program Manual.
- Geo-eligibility:** Subscriber eligibility is demonstrated by residence in an Interim Disadvantaged Community (DAC).
- Affordable Housing Residential Eligibility:** All residents of a regulated affordable housing property can be deemed eligible if the property 1) meets the eligibility requirements of the NY-Sun Multifamily Affordable Housing Adder, 2) residence is limited to LMI households (80% AMI or below), and 3) participation in CDG will not result in any increased cost (e.g., rent or common charge increase) for the residential subscriber due to the utility allowance mechanism or other policies or practices.
- Individual Household Eligibility:** Any residential subscriber is considered eligible if they have a documented household income under 80% of Area Median Income (AMI) or 80% of State Median Income (SMI), whichever is higher.

Indicate which method you will use to confirm the eligibility of non-residential subscribers for the ICSA (select one)

- Affordable Housing:** Nonresidential demand and non-demand accounts serving an eligible affordable housing property (i.e., building/common area meter).
- Nonprofit/public facilities serving DACs:** Accounts serving nonprofit organizations or public facilities that 1) meet the criteria of "small" subscribers per the CDG rules (non-demand account or demand account with an average peak monthly demand of less than 25 kW), and 2) are located within and serve a designated DAC.

PART B: PROJECT TEAM

1. If the NY-Sun Participating Contractor is working with subcontractors and/or partners on customer acquisition, customer management, and/or outreach, list each company/organization name, their role, and their primary point of contacts for NYSERDA to reach out if needed.

Company Name	Role	Point of First Contact	Point of Last Contact	Point of Contact Phone Number	Point of Contact Email

PART C: EXPERIENCE

1. Describe in 750 words or less how the project team has the experience and capability to meet the required Eligible Subscriber Target. This answer should demonstrate that the Contractor, or customer acquisition and customer management provider(s) to be used, has the appropriate experience and capability to fulfill the requirements of the ICSA. Your responses must address and answer the following questions:
- a. What are the roles, responsibilities, and functions of each party described above in Part A.
 - b. What is the project team’s experience in marketing, selling, and managing community solar subscriptions?
 - c. Does the project team have specific experience marketing to, selling to, and managing the subscriptions of low-to-moderate income customers (eligible residential subscribers for the ICSA)? If so, describe that experience.

PART D: MARKETING AND SALES STRATEGY

1. Eligible Residential Subscriber Strategy: Describe in 750 words or less the marketing and sales strategy that will be used to target the eligible residential subscribers. The answer should demonstrate that the Contractor and their project team has the ability to achieve the targeted percentage of eligible residential subscribers identified in the project's ICSA application.

The strategy is not allowed to require minimum FICO scores for the portion of the project that qualifies for the ICSA, but can use an alternative option, such as utility bill payment history, to qualify subscribers.

Your answer should include the following:

- a. Targeted geographic locations (identify towns/neighborhoods and/or zip code). Specify whether these locations are within designated DACs.
- b. Targeted specific residential customer segments within the geographic locations.
- c. Planned engagement tactics for each specific customer segment.
- d. Marketing Mix (social, physical advertising, branded content, etc.) used to reach your target audience.
- e. Clear articulation of long-term goal of the plan, with short-term benchmarks that act as markers of interim success.
- f. If channel partners are being utilized, how those partnerships will be part of the Marketing and Sales Strategy.

This answer should also provide details on how you will confirm customer eligibility:

- a. **Categorical Eligibility:** Describe what documentation will be collected to confirm subscriber eligibility.
- b. **Geo-eligibility:** Verify that you will use the Self-Attestation Form, and if not, outline how you will ensure that the households you sign up in the Interim DAC meet the ICSA income requirements.
- c. **Affordable Housing Residential Eligibility:** Describe how you will partner with affordable housing properties and sign up their residents to the community solar project. The description should detail if the property 1) meets the eligibility requirements of the NY-Sun Multifamily Affordable Housing Adder, 2) residence is limited to LMI households (80% AMI or below), and 3) participation in CDG will not result in increased costs (e.g., rent or common charge increase) for the residential subscriber due to the utility allowance mechanism or other policies or practices.

If an affordable housing property is master-metered, specify how the required 10% savings, or its equivalent, will be provided to building residents who are considered eligible residential subscribers.
- d. **Individual Household Eligibility:** Describe how you will collect and store documented household income information.

4. Planned Strategy for the EJ Incentive: If the Participating Contractor is applying for the Environmental Justice Incentive, describe in 500 words or less how this project will benefit environmental justice communities impacted by pollution from power generation.

- a. Your response must demonstrate close partnership(s) with local community organizations and stakeholders throughout the project development process; including siting, construction, and customer outreach.
- b. The project must provide additional community benefits beyond cost savings to subscribers. Examples of co-benefits should include but are not limited to the following:
 - i. Workforce training and hiring commitments for members of the surrounding environmental justice community.
 - 1. Documentation of partnership(s) with local training and/or employment agencies.
 - 2. Detailed plan for training and hiring, including job descriptions and wage targets.
 - ii. Community-based or participant ownership models
 - 1. Documented commitment of anticipated community owners and/or facilitating representative organizations, and their participation (as applicable) in the project development process.
 - 2. Details on ownership and/or revenue sharing structure(s), including management, legal and financial terms and projected economic benefit(s) to community/participant owners.
 - 3. Details on project financing and sources, particularly locally-sourced financing.
 - 4. Documentation of protections in place to ensure that there will be no short or long-term negative financial impacts for low income participants/owners.
 - iii. Other Co-Benefit ideas
 - 1. Other ideas for co-benefits that provide specific, measurable commitment to the community where the project is sited and includes input and approval from that local community.

PART E: CUSTOMER ENGAGEMENT AND MANAGEMENT

1. In 750 words or less, outline your customer service operations and processes. In your response, be sure to address the following items:
- a. The different ways a customer can sign up for this project.
 - b. How a potential or current customer can contact you if they have questions, including the available ways (phone, email, chat, etc.) and hours of operation. Indicate if there is a different process for potential versus current customers.
 - c. How you would answer the following questions from a potential customer:
 - i. They do not understand community solar and are worried about the negative personal impacts of signing up.
 - ii. They are receiving assistance on their electric bill (HEAP, utility program, etc.) and are concerned about how the credits will interact.
 - d. What information a customer receives before and after they sign up for a subscription.
 - e. What your protocol is if a customer has the following issues:
 - i. Issues with the subscription or amount of credits listed on their bill.
 - ii. Issues with how their utility and/or ESCO is handling their credits.
 - iii. They missed their subscription fee payments.
 - f. Details on how you engage and support customers with accessibility considerations, including:
 - i. Limited English Proficiency
 - ii. Limited access to internet, computer/mobile technologies, or landline access.
 - iii. Visual, motor, auditory, speech, sensory or cognitive disabilities.

PART F: REQUIRED SUPPORTING DOCUMENTATION

The following materials must be uploaded in the Documents section (Step 4) of the ICSA application in the Portal.

- 1. Example Marketing and Messaging Materials:** Example materials that represent the types of collateral and messaging that will be used by the project team for this community solar project. The sample marketing and messaging Materials should include but are not limited to the following:
 - a. Collateral that will be sent in the mail or hung on doors
 - b. Social media posts
 - c. Sample email blasts
 - d. Screenshots of a customer experience after signing up online.
 - e. Other frequently used customer-facing marketing and messaging materials not listed above
- 2. Documentation of Commitment:** Documentation (via team agreements, sub-contracts, letters of intent, etc.) from an Organizational Representative that demonstrates a commitment to participate in the community solar project. This is only required for Non-Residential Eligible Subscribers and Affordable Housing Residential Eligibility.
- 3. Example Customer Agreements:** Examples of all the contractual materials that each customer must sign to receive the community solar subscription. The contractual materials should include the following information:
 - a. Terms of Participation, including eligibility and qualification requirements
 - b. Fees, Pricings, and Savings
 - c. Terms of Cancellation

