



Community Solar NY: 2016 Resource Guide for Solarize Campaign Success

The New York State Energy Research and Development Authority (NYSERDA) works with community leaders, local governments, schools, and organizations to rollout “Solarize” campaigns, where groups of solar customers come together to lower the costs of solar installations through group pricing discounts. Solarize campaigns team up with competitively chosen solar electric (also known as photovoltaic or PV) installers to make residential and small commercial solar energy more accessible and affordable for residents and businesses across New York State.



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Solarize Team

Local Community

- Solar Ambassadors
- Engagement and Grassroots Groups
- Event Hosting
- Communications Strategies

NYSERDA

- Solar Incentives
- Program Support
- Technical Assistance

Solar Installer

- Turnkey Installation
- Ownership Options
- Competitive Pricing

Solar Customer

- Get Free Site Assessment
- Decide on Ownership Model
- Tell Friends & Neighbors

Typical Solarize Timeline

Months 1 to 2

Pre-launch: Installer Selection, Outreach and Marketing Planning

Months 3 to 4

Launch: Campaign Set Ups Begin



Months 5 to 6

Public Outreach Campaign: Educational Events, Bi-weekly Calls, Solar Tours



Months 7 to 8

Campaign Ends: Celebrate Success





Solar Installer Selection Process

Solar Installer Request for Proposal (RFP) Template Overview

Selecting a solar installer (or installers) for your campaign is one of the most important roles that your core group has to play. The installer selection process is a great opportunity to shape the campaign to meet the goals of your community, and to get to know the solar installers who will be working with you to serve your neighbors. The process can also be challenging, as it involves reviewing multiple competing proposals while trying to make “apples to apples” comparisons.

As a participating campaign in Community Solar NY, the Community Solar NY team will support you throughout this process by:

- Prequalifying solar installers (see RFP template for details).
- Providing a template RFP for solar installers.
- Hosting an informational workshop/webinar about the process.
- Providing a technical review of proposals by our technical assistance provider.

Please note that some of this support will be provided through online webinars.

Community Solar NY hopes this support will help you to make a well-informed and confident decision. Remember that it is your decision: your team is fully responsible for issuing an RFP, collecting responses, and utilizing the Community Solar NY resources in making the best decision for your campaign. Note that NYSERDA cannot provide legal advice or act as legal counsel to any community.

Using the RFP Template

This RFP Template is based on successful models from New York State and elsewhere. It is meant to provide clear guidelines and expectations for solar installers interested in participating in a Solarize campaign, and to encourage responses that are detailed but easily understood. It is also meant to make the process as straightforward as possible for installers, who are investing their time and resources to respond.

Solarize is not one-size-fits-all. Using this template for your campaign requires the addition of campaign-specific information (in the highlighted text areas of the RFP) and provides opportunities for the Solarize Team to include their own community priorities. For example, some campaigns choose to give priority to locally based installers, or those that have an option for North American-made solar modules. You should be as clear as possible about your campaign’s selection preferences.

In addition, the overall structure of Solarize campaigns can vary depending on the Solarize Team’s goals and the local context. This template allows for the “traditional” Solarize structure of a single selected installer with tiered pricing that provides progressively greater discounts as more people sign contracts. This template also allows for a structure in which there are multiple selected installers, where a single price is provided rather than tiers. Some of the pros and cons of these approaches are described in the following chart.

Pricing Structure	Pros	Cons
<p>Single Installer, Multiple Pricing Tiers (Traditional): Only one installer (or installer team) will be selected as the preferred installer for the Solarize campaign. Pricing decreases for everyone as more contracts are signed.</p>	<ul style="list-style-type: none"> • Encourages participants to reach out to others to get a better deal. • Only one installer to manage. • Easier to understand for participants. 	<ul style="list-style-type: none"> • May experience backlogs if high volume is achieved. • Less diversity and options for participants.
<p>One or More Installers, Single Pricing Tier: Each selected installer (or installer team) up to a maximum of three provides a single base price for the campaign.</p>	<ul style="list-style-type: none"> • Allows more installers to take part. • Allows more choice for participants. 	<ul style="list-style-type: none"> • Multiple installers can be more challenging to manage.

Once again, the RFP template is provided for your guidance. Your team is responsible for its use, the installer selection process and decisions, and the implementation of your Solarize campaign. Email the Community Solar NY team at communitysolar@nyserda.ny.gov with any questions.

Frequently Asked Questions Regarding the Installer RFP Template

Can we change the RFP? Or use our own?

Yes, it is your community and your campaign. The template requires you to make some changes and edits to customize for your group, and you can add your own community priorities. If you wish to use an entirely different document or process, please discuss it with the Community Solar NY team before applying.

How should we make solar installers aware of our campaign and distribute our RFP?

Community Solar NY and its partners will be providing all eligible solar installers with a list of campaigns launching this spring. However, we also recommend reaching out to installers in your area and utilizing the public list of NY-Sun installers at ny-sun.ny.gov/Get-Solar/Find-A-Solar-Electric-Installer.

Community Solar NY recommends setting up an email address for the campaign, and possibly using a file sharing service to receive proposals.

What if someone on our core team has a business or personal connection to an installer that is applying?

The core team member should not participate in the RFP development, selection process, or decision-making in any way.

Strategies for Working with your Solarize Installer(s)

Installers are integral Solarize team members and it's important to involve them in every step of the campaign. Establish and communicate expectations early in the process and create rules of engagement and conduct between the Solarize community and installer. Establish responsibilities and roles:

- Who is responsible for doing solar education?
- What marketing materials are they permitted to use? What marketing materials will the installer provide?
- How should they represent the campaign on their website and their materials?
- If multiple installers, how will they split or share leads? Can they split the cost of a town mailing?
- What is expectation for lapse of time between customer contact, lead delivery, and installation?

Installer Best Practices

Solarize campaigns present various sales management opportunities and challenges because of the high volume of leads they generate in a short amount of time. Installers who are nimble and able to adjust to this volume are often the most successful. Some of the more successful installers have streamlined their best practices to include the following:

- **Immediate customer contact** via phone and/or email within a couple of hours or same day
- **Streamlined quote delivery** – they prepare a quote in advance of a site visit and are prepared to adjust the quote on-site with the customer and provide them a quote during the site visit. The faster the quote delivery, the higher the likelihood of sales conversion.
- **Connection to financing options** - rather than leaving the daunting task of finding financing up to the customer without assistance, which will lengthen the time to decision.
- **Ask customers to sign a letter of intent or commitment**, if the quote is not finalized at the site visit. Even though this practice is not binding, it does represent a higher level of commitment on the part of the customer to follow through with the service.

Tracking and Managing Customer Inquiries

- Create strategies to address problems early in the process.
- Identify key points of success to tell media and the community.
- Tracking metrics is key to managing success.

Pre-Launch Campaign Outreach and Marketing Planning

Define Team Roles

Every team member should have a role, so that everyone on the team will feel included. Dividing tasks/roles will help manage the workload and avoid volunteer burnout. Roles may include:

- Project Manager/Team Leader.
- Coordinating media outreach (print, radio, social).
- Coordinating solar ambassadors (community members who have experience with solar usually in their homes).
- Scheduling workshops/events.
- Emailing attendees/invitations.
- Setting bi-weekly agendas/meetings.
- Building and maintaining database.
- Taking pictures at events and maintaining photo album.

Build an Outreach Strategy

With your team, complete the campaign tracking form template which can be found on the NY-Sun website.

- Identify outreach opportunities.
- Look at local calendars and tap into existing events.
- Create your own events: workshops at libraries, solar home tours, financing workshops, etc.
- Work with Partners to plan events.

Tell Your Community's Solar Story

- Be able to articulate why you personally wanted to participate in Solarize — personal stories matter and inspire.
- As a team, decide on the message that you want to convey: why is it important for your community to expand solar?
- Include messaging from community leaders (spoken and written) because when trusted leaders endorse the campaign, more people will consider solar.

“With electric rates rising so much, there’s never been a better time to invest in a solar system for your home or business in Westchester County.”

– Mayor Leo Wiegman, Village of Croton, NY



Photo Courtesy of Solarize Westchester



Photo Courtesy of Solarize Westchester

“Improving sustainability and energy savings are important priorities for the Town of Mamaroneck which makes the Solarize program so exciting. We look forward to helping residents implement solar strategies to reduce their energy costs and reduce greenhouse gases for our region.”

– Supervisor Nancy Seligson, Town of Mamaroneck, NY

Forging Partnerships and Tapping into Existing Social Networks

About 20 percent of people who go solar through a Solarize campaign have never considered solar before, so tapping into new customer bases is key for building the solar market.

Developing key partnerships with existing organizations is essential to spreading the word about the campaign. In exchange for agreeing to include messages about the campaign to constituents through the campaign, you might consider listing them as a partner on your website or marketing materials. These partnerships elevate the legitimacy of the campaign to the community.

- What organizations do team members have established relationships with?
- What organizations share a common message or interest?
- Identify influential organizations in the community that are effective in connecting with people. They often have established communication networks and well-developed constituencies. They may not share an obvious interest in environmental issues or solar, but may see the benefits to the members/constituents for supporting the program. (Examples: Chambers of Commerce, Boys' & Girls' Scouts, Garden Clubs, Rotary Clubs, Schools, etc.)

Developing a Media Plan

- Identify local media contacts (editors and reporters) at local papers, radio stations, online news publications, local cable access stations, etc. Find out where your friends and neighbors get their news. Follow these contacts on social media, if they are using it.
- Articles in the local newspaper are one of the strongest ways to drive traffic to your website.
- Press release-worthy events include campaign launch events, the first live installation, a solar tour, and end of the program.
- Follow-up with a call to specific reporters after a press release is sent to be sure they received it. This conversation is often an opportunity to build their interest in the story.
- Take many pictures at your events (including a photo that includes the name of your Solarize program). A photo and a post event release makes it more likely to get printed after the fact. Place photos on website, Facebook, and Twitter feeds.
- List events on the Event Calendar section of local papers.



Solarize Canton at the Dairy Princess Parade

Creating Compelling Marketing Materials with Templates Provided

- Don't clutter your materials (flyers, banners, etc) with too many words.
- Remember, you want to engage people with just enough information so they want to learn more.
- Bullet key selling points rather than describing them in paragraphs.
- On marketing collateral, be sure to highlight:
 - Discount on the price of solar
 - Pre-screened solar installer
 - Reduce energy costs
 - Deadline, as that helps prompt people to act
 - Website URL (Goal is to get viewers to attend a meeting or go to the website)
- Leave a lot of blank space on your flyers. Test: step back from materials to see if message (headline) "pops."
- Make logo highly visible, usually in the lower right corner. Assure that all marketing materials are showcasing your brand so it becomes recognizable.
- For website, create customized URL by purchasing your own campaign domain name, for example "www.solarschuyler.org." Include solar testimonials and local, recognizable pictures.



Creating Visibility for the Campaign

- Identify high visibility locations across your community to place banners, yard signs, and flyers. Check with planning commission/zoning officer about regulations.
- Locate key bulletin boards across town to display an event flyer (libraries, coffee shops, local grocery stores, etc.).
- Find out if you can pass out campaign flyers at the town's waste station or include with a tax or water bill.
- Focus on those areas of your community that are good for solar (where there are fewer trees and a lot of owner-occupied homes).

Campaign Launch

The Solarize launch is one of the most important events of the campaign as it sets an exciting tone for the campaign, gives participants access to information, and introduces them to the solar installer and other people who have gone solar. The launch also shows the community that local leaders and organizations are supporting the campaign, which provides credibility and builds trust in the campaign.

“Soft” launches are not recommended. Do not give people access to campaign before the official launch. Building anticipation will galvanize energy and inspire people to participate once the campaign begins. Waiting until the launch also places higher importance on the event and encourages more people to attend.

Strategies for a Successful Launch

- Plan event with enough advance notice – at least one month.
- Build excitement of event – media, email invitations, social media, flyers.
- Advertise on community/partner websites and newsletters.
- Set up registration for event.
- Send press release about one week before event.
- Plan to have local leader to speak at event.
- Hold interviews with local media.
- Invite solar installers and solar ambassadors to attend.
- Serve light food/refreshments.

Find resources for launch event planning by visiting the **Community Outreach Plan** section of ny-sun.ny.gov/Get-Solar/Community-Solar

Types of Launch Events

1) Workshop Launch – Usually a full “Solar 101” presentation, more structured, 1 to 2 hours, provides opportunity for people to gain a fuller understanding of the campaign and solar energy, as well as to meet the installers.

2) Launch Celebration/ Meet & Greet – More of a party atmosphere, a few informal comments from Solarize organizers, local leaders, and current solar owner(s); change to meet the installer(s); usually shorter in length; educational workshops usually planned within a week later so that people can also get more in-depth information.



Solarize Westchester Launch Event
Photo Courtesy of Solarize Westchester



Solarize Troy Launch Event
Photo Courtesy of Solarize Troy

Common Elements of a Launch Event

- Introduce Solarize team.
- Local leader endorses campaign.
- Give facts about solar.
- Provide information about the website and how to get a solar quote through the Solarize campaign.
- Introduce the installer(s).
- Have a solar ambassador give testimonial.
- Create a festive, fun atmosphere.

Maintaining Campaign Momentum

Team Calls

Holding regular, scheduled calls with team members and installers and with the team and Community Solar NY staff is important to keep everyone engaged, to understand how the campaign is progressing and to identify problems as early as possible. During these calls:

- Check on progress of campaign– number of inquiries, site visits, quotes provided, signed contracts.
- Have solar installer(s) provide updates and review metric tracking.
- Talk about any problems or concerns.
- Review upcoming outreach events to see if there are enough planned for next two to four weeks (or too much activity planned).
- Prepare for marketing collateral for upcoming events.
- Review website to ensure it has up-to-date information and photos.
- Share comments from participants.
- Verify if installer(s) keeping up with site visits and customer contact.
- Plan to get out to take pictures if installations are scheduled.

Five Most Effective Ways to Drive People to Your Website for a Solar Quote

Based on research of completed Solarize campaigns in 58 communities in Connecticut, here are the top five avenues in which the solar participants found out about the campaigns:

1) Letter to Homeowners

By far, the most successful strategy for reaching residents and instilling confidence in a Solarize program is a letter sent to all of a town's homeowners at the beginning of the campaign from a chief elected official. This letter lets community members know that the town supports Solarize and encourages homeowners to participate. (See template under Outreach Resources.)

2) Media Opportunities

Media opportunities include press releases, new advisories, op-ed pieces, letters to the editor, and appearances on local radio and television shows. In addition, town websites and town and personal Facebook pages are used to publicize the program and significant events. (Find templates and tips under Outreach Resources).

3) Workshops

Informational workshops held regularly throughout the campaign give homeowners an opportunity to learn about solar and the details of Solarize.

4) Yard Signs and Table Banners

Signage reminds people about the Solarize program. People who own solar and town property are good places for signs. Each town has a different policy regarding signage so check that out before ordering.

5) Solar Ambassadors

Residents in your community who support solar and are willing to volunteer are the best proponents of Solarize. Often these residents already have solar on their own homes or are dedicated to renewable energy. This program gives them an opportunity to talk to their friends and neighbors about solar.

Other Outreach Ideas and Activities

- **Solar Home Tours or Open Houses** – Solar owners agree to open up their homes to show visitors their solar panels and associated equipment (inverters, meters, etc.) to talk with visitors about why and how they went solar. A solar open house is often a convincing experience and many people who ultimately purchase solar have visited a solar home and/or talked with an existing solar owner. These events are a good opportunity to display information about the campaign, collect visitor contact information and encourage them to request a quote through the campaign.
- **Installation Events** – A live installation, particularly the first one in the campaign, is a very exciting event in a community. Invite potential solar customers to watch the solar installers at work and talk with homeowner. Work with the installer to choose an installation that has good public visibility and a homeowner who will enjoy the interaction. Holding these events on a Saturday is often an opportune time for visitors.
- **Canvassing** – Identify neighborhoods with good solar potential and leave door hangers that briefly describe the campaign, the support from the community leaders and that mention that their home may be a good candidate for solar. Be sure to get permission from the municipality before starting such a campaign.
- **Home-hosted Gatherings** – Somewhat like a Tupperware® party, homeowners interested in assisting the campaign may invite a group of friends and neighbors for a barbeque, wine and cheese, or other simple gathering so that the campaign volunteers and/or installers can provide information about Solarize.
- **Exhibiting at Community Events** – Setting up an information table at community events and festivals may be a good way to engage large numbers of people about the campaign.

For all activities, always:

- Collect contact information for everyone attending events so enter their information into database so that you can invite them to subsequent events and provide them updates about the campaign.
- Send follow-up emails after events to people who have not requested a quote or have not responded to a quote.



Solarize Tri-Lakes table at event.
Photo courtesy of Solarize Tri-Lakes



Solarize Canton volunteers at event.
Photo courtesy of Solarize Canton



Solar Schuyler Event
Photo courtesy of Solar Schuyler

The Importance of Solar Ambassadors

People want to hear from other people who have purchased solar. When potential solar customers can relate to another person in their community who has already purchased solar and who is similar to them, the idea of putting solar on their home moves from a theoretical idea to a tangible reality. Researchers from Yale University and University of Connecticut have studied the patterns of solar adoption in communities across Connecticut. They have concluded that the most important factor in increasing solar is whether there is another solar system within a 0.5-mile radius of your home. If your neighbors have solar, you are almost twice as likely to purchase solar.

Solar owners are some of the most effective, enthusiastic, and influential sales agents, so it is helpful to have them attend events and tell their stories.

Solar Testimonials – Sharing the Successes

Displaying testimonials of existing solar owners on the website and on flyers at events is a great way showcase the enthusiasm and pride of people who are producing their own electricity. These stories are compelling to prospective solar customers.

When showing pictures of solar homes, include the homeowners in the pictures. People relate to other people more than they relate to buildings or the solar equipment itself.

“Ever since we bought our Albany County home nearly 20 years ago we’ve wanted to install solar photovoltaic panels to make clean energy, do our part to fight global warming, and to lower our energy costs. Ten years ago, we looked into solar PV and an equivalent system would have cost twice as much money. We are thankful for the Solarize Albany volunteers for helping us to realize our goals by creating a great program and making solar energy VERY affordable for our community. Solarize Albany’s contractor did a great job, too. Glad we stopped thinking about it and finally solarized!!! It was really easy and we own a quality system!”

– M, N, C, and J



“If anyone asks me about solar, I say yes absolutely do it! Our electric bills are almost nothing and that includes the electric car, the air conditioning, everything. I get satisfaction about saving money. But when I read about climate change, I get satisfaction knowing that my house is not contributing to climate change, and knowing that we’re not contributing to dependence on foreign oil.”

– Lloyd T. and Allison C., Bedford, NY

Using Media to Promote Success

Mapping out all the potential media outlets and developing relationships with reporters early in the campaign will prove advantageous as a low-cost strategy for spreading the word about Solarize.

- **Letters to the Editor** – Have new solar owners write letters to the editor to tell why they went solar. See Outreach Resources on the website.
- **Earned Media** – Getting a feature article in the local newspaper creates high visibility for a campaign in the community. See Tips for Working with the Media on the website.
- **Human Interest Stories** – Reporters often like to report on live installations and solar home tours and include the homeowner or business owner perspective.
- **Social Media** – Social media is a low-cost approach for reaching hundreds of people. See Tips for Working with the Media on the website.
- **Event Calendars** – Many media outlets have calendars that you can list Solarize events.

Installation Events

The first Solarize installation is an exciting event in a community and will galvanize interest by others who are considering solar and will bring in new prospective customers such as neighbors. Of course, installation events can be held throughout the campaign when convenient.

- Arrange with installer and owner.
- Pick a good home (visibility, access, parking, host).
- Send media notices in advance.

Solar Home Tours and Open Houses

Solar Home Tours or Open Houses provide potential customers the opportunity to see solar “up close and personal.” Many solar customers have made up their mind to purchase solar after attending a solar home tour. They will have the opportunity to view the equipment, including the panels, inverters, and meters, and speak to existing solar owners about their experience.



Solarize Tri-Lakes home tour
Photo courtesy of Solarize Tri-Lakes

Acknowledging the End of the Campaign

End of Campaign Celebration

Acknowledging the end of the campaign is an important tool to recognize the efforts of volunteers and the new solar owners. This event serves as a great vehicle to celebrate the success of the campaign, get the press involved, and to spur continued interest in solar post-campaign. Invite volunteers, new solar owners, installers, as well as people who have been undecided about going solar to a gathering. Send out a press release and invite the press. Post pictures on Facebook and Twitter.

After Solarize

- Link people to other energy initiatives in the community
 - Since a majority of people who request a quote for solar will not actually purchase a system, this is a good time to encourage them (and those who went solar) to invest in other energy saving measures.
- Keeping the solar momentum
 - Hold a solar tour of the new solar owners and then an annual solar home tour thereafter
 - Keep solar information active on your website
 - Run another round of Solarize

When and How to Use Social Media

When used well, social media can be an effective tool for spreading the word about campaign events and activities and can help build excitement about the campaign. However, if team members are not adept at using social media, a Solarize campaign may not be the best time to start. Social media effectiveness is difficult to start from scratch in the short Solarize timeframe. See Tips for Working with the Media on the website.

- Is there a team member who uses social media regularly? This person should be responsible for posting to Facebook and Twitter throughout the campaign.
- Set up Facebook and Twitter campaign pages, which are managed by volunteer(s).
- Start early in campaign to build audience and tap into social media of partners.
- Use pictures in most of your posts.



Visit ny-sun.ny.gov to learn more.

Email Us?

Email communitysolar@nyserdera.ny.gov with your questions.



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