**NYSERDA Clean Energy Communities Program**

**Solarize, Clean Heating and Cooling, or Solar for All Campaign - Scoping Document**

**Version 3**

**Purpose**

This scoping document is intended for use by local government officials seeking to earn credit for the Solarize, Clean Heating and Cooling, or Solar for All Campaign High-Impact Action under NYSERDA’s Clean Energy Communities Program. The purpose is to help municipal officials, campaign teams, and NYSERDA clearly understand the individual jurisdiction’s goals and objectives, milestones, and deliverables, as well as the roles and responsibilities of project partners, to help ensure the success of the campaign. Each campaign should complete a separate Scoping Document.

**Introduction**

Community-scale campaigns can be an effective way to encourage adoption of new, innovative technologies to generate value and savings for consumers while advancing New York’s clean energy goals. Solarize, Clean Heating and Cooling, and Solar for All each provide a model for how consumers can gain increased access to clean energy. Solarize is a short-term, local effort that brings together groups of potential rooftop solar and/or community solar customers through widespread outreach and education. Clean Heating and Cooling campaigns are aimed at getting groups of homes and businesses to install clean heating and cooling technologies. Solar for All offers income-eligible households the opportunity to subscribe to community solar at no cost. Solar for All participants receive monthly credits on their electricity bills with no upfront costs, fees, or payments to participate.

**What is the focus of your Campaign? (Check all that apply)**

* **Rooftop Solar**

The intent of the campaign is to encourage residential and/or commercial customers to install solar on their own rooftops.

* **Community Distributed Generation (CDG), a.k.a Community Solar**

The intent is to encourage customers to subscribe to community solar or other CDG projects.

* **Clean Heating and Cooling**

The intent of the campaign is to encourage customers to install the following CH&C technologies:

* + Ground source heat pumps
  + Air source heat pumps
  + Solar heating and cooling
  + Biomass
* **Solar For All**

The intent of the campaign is to encourage income-eligible customers to participate in NYSERDA’s Solar for All initiative.

* Check this box if the campaign is being undertaken as part of a NYSERDA Solarize or Clean Heating and Cooling Communities solicitation. **If yes, please skip to the last page (Part 4).**

**Step-By-Step Guidance**

**Rooftop Solar Solarize Campaigns**

Rooftop Solar Solarize Campaigns are short-term (approximately 6-9 months, including planning and outreach), local effort that brings together groups of potential solar customers through widespread outreach and education. This model helps customers choose a solar installation company that is offering competitive, transparent pricing. After a thorough pre-qualification process, a designated solar installer(s) will be named for the campaign. Residents and businesses who sign up for solar installations by a specific deadline will be able to take advantage of group rates below market prices. Well-organized Solarize campaigns are a great way to support solar while being active and visible in your community.

To earn credit for this High Impact Action with a Rooftop Solar Solarize Campaign, the applying jurisdiction, working with its campaign partners and the [Clean Energy Communities Coordinator](https://www.nyserda.ny.gov/Contractors/Find-a-Contractor/Clean-Energy-Community-Coordinators), should complete the following steps:

Step 1: **In the early planning stage, email a draft Scoping Document to** [**cec@nyserda.ny.gov**](mailto:cec@nyserda.ny.gov)

Complete Parts 1, 2, 3, and 4 using the best available information. Email the draft Scoping Document to [cec@nyserda.ny.gov](mailto:cec@nyserda.ny.gov) and wait for NYSERDA to respond before launching your Solarize campaign. Sending this email will provide NYSERDA the chance to provide feedback and to ensure all relevant requirements are followed. Failure to send this email may result in rejection of the High-Impact Action.

Step 2: **Ensure the solar installer(s) is selected through a competitive RFP process**

It is important that the solar installer(s) for the Rooftop Solar Solarize Campaign be selected through a competitive process using the program template Request for Proposals (RFP) and guidelines, or one that was reviewed and approved by NYSERDA. A template RFP and other resources are available on the [Solarize Your Community webpage](https://www.nyserda.ny.gov/All%20Programs/Programs/NY%20Sun/Communities%20and%20Local%20Governments/Solarize).

Step 3: **Demonstrate direct municipal participation in the Solarize Campaign**

Information should be dated so that the start date of the Solarize Campaign can be determined. Documentation should be dated and may include one or more of the following: information from a NYSERDA application, a press release, a flyer from an event hosted by the jurisdiction, a website screenshot, a local press article, a passed resolution, or comparable information.

Step 4: **Compile a Customer List**

The objective of any Rooftop Solar Solarize Campaign is to sign up residential and/or commercial customers to install solar on their property. Customers must be signed up after the start date of the campaign. A template Customer List is provided in the Solarize, Clean Heating and Cooling, or Solar for All Campaign Toolkit at [www.nyserda.ny.gov/cec](http://www.nyserda.ny.gov/cec).

Step 5: **Complete and Sign the Scoping Document**

Complete Parts 1, 2, 3, and 4, except if you can demonstrate that you are already participating in a past or current NYSERDA solicitation, in which case skip to Part 4.

Step 6: **Visit the** [**Submit Action Items Documentation**](https://www.nyserda.ny.gov/All-Programs/Programs/Clean-Energy-Communities/Submit-Action-Items-Documentation) **page and upload all required documentation**

**Community Solar Solarize Campaigns**

Community Solar Solarize campaigns focus on getting a group of homes and businesses in an area to start or join community solar projects. Community solar projects are an array of solar panels installed in a sunny, offsite location. Community solar allows residents and businesses to benefit from solar if they can’t (or don’t want to) install panels on their respective properties.

Participants in community solar projects get credits toward their electricity bill by subscribing to a local clean energy project. Community solar installations must be built within the same electricity service areas, as determined by utilities and transmission operators. Visit [this map](https://www.nyserda.ny.gov/All-Programs/Programs/NY-Sun/Solar-for-Your-Home/Community-Solar/Community-Solar-Map) to see where community solar installations are being developed near you.

To earn credit for this High Impact Action with a Community Solar Solarize Campaign, the applying jurisdiction, working with its campaign partners and the [Clean Energy Communities Coordinator](https://www.nyserda.ny.gov/Contractors/Find-a-Contractor/Clean-Energy-Community-Coordinators), should complete the following steps:

Step 1: **In the early planning stage, email a draft Scoping Document to** [**cec@nyserda.ny.gov**](mailto:cec@nyserda.ny.gov)

Complete Parts 1, 2, 3, and 4 using the best available information. Email the draft Scoping Document to [cec@nyserda.ny.gov](mailto:cec@nyserda.ny.gov) and wait for NYSERDA to respond before launching your Solarize campaign. Sending this email will provide NYSERDA the chance to provide feedback and to ensure all relevant requirements are followed. Failure to send this email may result in rejection of the High-Impact Action.

Step 2: **Clearly define roles and responsibilities of campaign partners**

While not a strict requirement, the CDG project(s) may be selected through a competitive process using the program template Request for Proposals (RFP) and guidelines, or one that was reviewed and approved by NYSERDA. At a minimum, the local government and the solar developer should enter into a Memorandum of Understanding (MOU) to clarify roles and responsibilities of campaign partners. A template RFP, MOU, and other resources are available on the [Solarize Your Community webpage](https://www.nyserda.ny.gov/All%20Programs/Programs/NY%20Sun/Communities%20and%20Local%20Governments/Solarize).

Step 2: **Demonstrate Direct Municipal Participation in the Solarize Campaign**

Information should be dated so that the start date of the Solarize Campaign can be determined. Documentation should be dated and may include one or more of the following: information from a NYSERDA application, a press release, a flyer from an event hosted by the jurisdiction, a website screenshot, a local press article, a passed resolution, or comparable information.

Step 3: **Submit a Customer List**

The objective of any Community Solar Solarize Campaign is for residential and/or commercial customers to subscribe to a CDG project. Customers must subscribe after the start date of the campaign. A template Customer List is provided in the Solarize, Clean Heating and Cooling, or Solar for All Campaign Toolkit at [www.nyserda.ny.gov/cec](http://www.nyserda.ny.gov/cec).

Step 4: **Complete and Sign the Scoping Document**

Complete Parts 1, 2, 3, and 4 except if you can demonstrate that you are already participating in a past or current NYSERDA solicitation, in which case skip to Part 4.

Step 5: **Visit the** [**Submit Action Items Documentation**](https://www.nyserda.ny.gov/All-Programs/Programs/Clean-Energy-Communities/Submit-Action-Items-Documentation) **page and upload all required documentation**

**Clean Heating and Cooling Campaigns**

Clean Heating and Cooling campaigns are aimed at getting groups of homes and businesses to install clean heating and cooling technologies including ground source heat pumps, air source heat pumps, solar heating and cooling, or biomass.

To earn credit for this High Impact Action with a Clean Heating and Cooling Campaign, the applying jurisdiction, working with its campaign partners and the [Clean Energy Communities Coordinator](https://www.nyserda.ny.gov/Contractors/Find-a-Contractor/Clean-Energy-Community-Coordinators), should complete the following steps:

Step 1: **In the early planning stage, email a draft Scoping Document to** [**cec@nyserda.ny.gov**](mailto:cec@nyserda.ny.gov)

Complete Parts 1, 2, 3, and 4 using the best available information. Email the draft Scoping Document to [cec@nyserda.ny.gov](mailto:cec@nyserda.ny.gov) and wait for NYSERDA to respond before launching your campaign. Sending this email will provide NYSERDA the chance to provide feedback and to ensure all relevant requirements are followed. Failure to send this email may result in rejection of the High-Impact Action.

Step 2: **Clearly define roles and responsibilities of campaign partners**

It is important that the installer(s) for the Clean Heating and Cooling Campaign be selected through a competitive process that has been reviewed and approved by NYSERDA.

Step 2: **Demonstrate Direct Municipal Participation in the Campaign**

Information should be dated so that the start date of the campaign can be determined. Documentation should be dated and may include one or more of the following: information from a NYSERDA application, a press release, a flyer from an event hosted by the jurisdiction, a website screenshot, a local press article, a passed resolution, or comparable information.

Step 3: **Submit a Customer List**

The objective of any Clean Heating and Cooling Campaign is for residential and/or commercial customers to installed eligible technologies. Customers must sign contracts with vendors after the start date of the campaign. A template Customer List is provided in the Solarize, Clean Heating and Cooling, or Solar for All Campaign Toolkit at [www.nyserda.ny.gov/cec](http://www.nyserda.ny.gov/cec).

Step 4: **Complete and Sign the Scoping Document**

Complete Parts 1, 2, 3, and 4 except if you can demonstrate that you are already participating in a past or current NYSERDA solicitation, in which case skip to Part 4.

Step 5: **Visit the** [**Submit Action Items Documentation**](https://www.nyserda.ny.gov/All-Programs/Programs/Clean-Energy-Communities/Submit-Action-Items-Documentation) **page and upload all required documentation**

**Solar for All Campaigns**

Solar for All campaigns focus on getting eligible residents to join a participating Solar for All community solar project. Community solar projects are an array of solar panels installed in a sunny, offsite location. Community solar allows homeowners and renters to benefit from solar.

Solar for All participants will receive a no cost community solar subscription. The energy that is generated by that subscription will be applied to their electricity bill in the form of a credit. Community solar installations must be located within the same electricity service area as the participating customer. Visit [this map](https://www.nyserda.ny.gov/All-Programs/Programs/NY-Sun/Solar-for-Your-Home/Community-Solar/Solar-for-All/Current-Projects) to see where Solar for All projects are located.

To earn credit for this High Impact Action with a Solar for All Campaign, the applying jurisdiction, working with its campaign partners and the [Clean Energy Communities Coordinator](https://www.nyserda.ny.gov/Contractors/Find-a-Contractor/Clean-Energy-Community-Coordinators), should complete the following steps:

Step 1: **In the early planning stage, email a draft Scoping Document to** [**cec@nyserda.ny.gov**](mailto:cec@nyserda.ny.gov)

Complete Parts 1, 2, 3, and 4 using the best available information. Email the draft Scoping Document to [cec@nyserda.ny.gov](mailto:cec@nyserda.ny.gov) and wait for NYSERDA to respond before launching your Solar For All campaign. Sending this email will provide NYSERDA the chance to provide feedback and to ensure all relevant requirements are followed. Failure to send this email may result in rejection of the High-Impact Action. Resources to help raise awareness about the Solar for All program are available on the [Solar for All Resources webpage](https://www.nyserda.ny.gov/All%20Programs/Programs/NY%20Sun/Solar%20for%20Your%20Home/Community%20Solar/Solar%20for%20All/Outreach).

Step 2: **Demonstrate Direct Municipal Participation in the Solar For All Campaign**

Information should be dated so that the start date of the Solar For All Campaign can be determined. Documentation may include one or more of the following: a press release, a flyer from an event hosted by the jurisdiction, a website screenshot, a local press article, a passed resolution, or comparable information.

Step 3: **Sign up Subscribers**

Large-size communities (40,000+) must enroll at least 25 Solar for All customers and Small/Medium-size communities (1-30,000) must enroll at least 10 customers. For Solar for All campaigns, a Customer List is not required. NYSERDA will independently verify 1) that the required number of customers have signed up or been placed on a wait list for Solar for All within the jurisdiction and 2) that these customers signed up after the date on which the applying jurisdiction began its campaign. Solar for All is only available for eligible customers that pay the Systems Benefit Charge (SBC) on their electric bill and is not available on Long Island or in Municipal Utility communities.

Step 3: **Complete and Sign the Scoping Document**

Complete Parts 1, 2, 3, and 4.

Step 4: **Visit the** [**Submit Action Items Documentation**](https://www.nyserda.ny.gov/All-Programs/Programs/Clean-Energy-Communities/Submit-Action-Items-Documentation) **page and upload all required documentation**

**Part 1: Project Overview, Primary Contact, and Lead Organization**

**What is the name of the campaign ("Solarize XYZ" or other name)?**

**What community/communities will be served, and who are the intended participants?**

*Specify the geographic area that your campaign falls within i.e., village, town, city, or county? Who are the intended participants?*

**Who is the project manager for you campaign?**

*This person serves as the primary contact and is the liaison between NYSERDA and the core team for the duration of the campaign. All communication between NYSERDA and the campaign will go through this individual. This person can be a volunteer, official, or staff member of the local government or lead organization. The project manager may not have financial relationships with vendors that may apply to participate in the campaign. The project manager should expect to make a significant time commitment to the campaign.*

First Name:

Last Name:

E-mail ::

Phone Number:

Title/Position:

**Who is the lead organization?**

*The lead organization must be a local government, school district, or nonprofit organization (Partnerships are strongly encouraged). The lead organization is responsible for coordinating with NYSERDA and among the other partners.*

Name of Lead Organization:

Mailing Address:

The Lead Organization is a:

**Part 2: Partners and Core Team**

**Provide the names of all members of your Core Team.**

*The Core Team may consist of volunteers from the community, officials, and/or staff members of the local government, or other partners. At least one official and/or staff member from the applying jurisdiction shall be a member of the Core Team and identified below. Include each Core Team member’s role along with any specialty i.e., marketing, social media, specific software such as MS Excel, community outreach, etc. Core Team members may not have financial relationships with vendors that may apply to participate in the campaign. Core Team members should expect to make a significant time commitment to the campaign.*

**List the names of all local partner organizations.**

*Local partners may be community groups, local businesses, local governments, school districts, etc. These partners should contribute to the overall success of the campaign. Describe the role each organization will play in the campaign. It is strongly encouraged that the local government(s) be either the lead entity or a partner. It is encouraged that the campaign obtains a letter of commitment from the jurisdiction’s chief elected official describing their level of assistance and/or a local resolution expressing support of the campaign.*

**Part 3: Community Profile and Preparation**

**Describe the community served by the campaign.**

Include population and number of owner-occupied residences. Include any information that would be relevant to the scheduling of a seasonal campaign. For example, is your community a vacation destination, college town, consisting largely of renters, etc?

**Describe your community’s participation in local sustainability and clean energy initiatives.**

*Describe your community’s participation in Clean Energy Communities and Climate Smart Communities. Has your community been in contact with a former Solarize campaign? Do you have plans to coordinate with another campaign?*

**Part 4: Campaign Goals, Vendor Selection, and Preliminary Marketing and Outreach Plan.**

**If applicable, describe how vendors have been selected to participate in the campaign. If applicable, please submit your Campaign’s Vendor Request for Proposal (RFP) for NYSERDA Review and Approval.**

**Campaign Goals**

*State your goals for the number of installations that will result from your campaign within the applying jurisdiction’s municipal boundaries:*

|  |  |
| --- | --- |
| Number of Installations: |  |

Other goals:

**Campaign Milestones**

*Fill out these dates to the best of your ability. Dates are estimates and are subject to change.*

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| --- | --- |
| RFP Released | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| RFP Questions Due | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| RFP Question Responses Released | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| RFP: Proposals Due | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Interviews | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Installer(s)/Vendors selected | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Launch Event | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Public Outreach & Education Events | Date:\_\_\_\_\_\_\_\_\_\_\_\_  Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Participant Sign-Up Deadline | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Participant Contracting Deadline | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Installations | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |

**Marketing and outreach plan**

*Provide a detailed marketing and outreach plan for your campaign by filling in the following tables. Describe potential outreach activities, venues, and partnerships, as well as the campaign’s timeline. Examples are provided in the tables. Fill in the preliminary budget table to estimate project expenses.*

**Events – Residential**

*Consider community calendars; workshops at libraries, lunch & learns, upcoming community events, etc. and list campaign events*

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| --- | --- | --- | --- | --- | --- |
| **Completed?**  **(X)** | **Event and Venue (List events)** | **Date/Time** | **Result (number of attendees)** | **Notes** | **Assign roles** |
| ***X*** | *Launch Event; community library* | *8/16/15; 7:00pm* | *75* | 50 requests for quotes | *Nancy – reserve venue; Richard – send out press release; Bill – send email invitation; Betty- print event posters and hand out*; *Doug – get refreshments* |
|  | *Apple festival; Smith Orchard* | *9/15/15; 2:00pm* |  |  | *Betty – bring handouts and sign up sheets; Doug – organize volunteers; Nancy – bring chairs and table* |
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**Events – Commercial**

*Consider Lunch & Learns at employers, Green Building Associations or business energy events, Technology councils or Chamber of Businesses and list campaign events.*

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| **Completed?**  **(X)** | **Event and Venue (List events)** | **Date/Time** | **Result (# of attendees)** | **Notes** | **Assign roles** |
| ***X*** | *Lunch & Learn; FedEx office* | *8/31/15; 2:00pm* | *15* |  | *Nancy – print brochures; Bill – confirm with installer* |
|  | *Chamber of Commerce* | *10/15/15* |  |  |  |
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**Partner Organization Outreach**

*Consider which partner organizations will help spread your message i.e. volunteer committee, environmental clubs and organizations, faith communities, Boys/Girls Scouts, Rotary Clubs, schools, etc.*

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| --- | --- | --- | --- | --- |
| **Name** | **Date** | **Item** | **Who/Contact Info** | **Social Media Addresses** |
| *Sierra Club* | *Throughout campaign* | *Email database and social media* | *Ben Smith;* [*bsmith@google.com*](mailto:bsmith@google.com) | *www.facebook.com/sierraclubny* |
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**E-Newsletters**

*Consider spreading your message through a municipal email newsletter or through email newsletters of a partner organization, homeowner associations, etc.*

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| --- | --- | --- | --- | --- |
| **Name** | **Date** | **Item** | **Who** | **Completed?** |
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**Local Media**

*Consider issuing a press release and conduct outreach to print, radio, online publications and social media; identify local reporters that cover business, neighborhood/community interest, home and garden, and environment.*

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| **Outlet** | **Date** | **Story** | **Who** | **Completed?** |
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**Websites**

*Identify websites that will host information about your campaign or events.*

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| --- | --- | --- | --- | --- |
| **Name** | **Date** | **Item** | **Who** | **Completed?** |
| *Solar Installer ABC* |  | *Webpage* | *Stan Johnson* | *X* |
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**Social Media**

*Identify social media to post information about your campaign or events.*

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| --- | --- | --- | --- |
| **Site** | **Dates** | **Who/What Posted** | **Completed?** |
| *Campaign Facebook page* | *8/12/15* | *Betty/launch event* | *X* |
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**Flyers/Banners/Mailings**

*Identify opportunities to use Flyers/Banners/Mailings to spread the word about your campaign or events.*

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| --- | --- | --- | --- |
| **What** | **Where Placed** | **When** | **Who is Responsible?** |
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**Tabling**

*Identify opportunities to use tabling to spread the word about your campaign or events.*

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| --- | --- | --- | --- |
| **What** | **Where** | **When** | **Who is Responsible?** |
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**Estimated Budget for Campaign Marketing and Outreach**

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| **Expense** | **Estimated Cost $** |
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If you have any questions or require additional information, please send an email to [cec@nyserda.ny.gov](mailto:cec@nyserda.ny.gov) and someone will get back to you.

**Part 4: Certification**

**NYSERDA Clean Energy Communities Program**

**Solarize, Clean Heating and Cooling, or Solar for All Campaign - Scoping Document**

**Terms and Conditions**

By signing the statement below, you are acknowledging your acceptance and adherence to the NYSERDA Clean Energy Communities Program Campaign Terms and Conditions:

* The campaign team is committed to and has the ability to conduct community-wide education and outreach around solar energy.
* There is local support and interest in a campaign.
* The campaign is able to achieve campaign goals.
* The campaign team is committed to following all program rules and requirements.
* A representative of the campaign team has sent an email to [cec@nyserda.ny.gov](mailto:cec@nyserda.ny.gov) to work with a Clean Energy Coordinator to ensure all NYSERDA requirements are met.
* If applicable, the solar installer(s) for the Rooftop Solar Solarize Campaign was selected through a competitive process using the program template RFP and guidelines, or one that was reviewed and approved by NYSERDA.
* If applicable, the selected solar installer(s) is [pre-qualified](http://www.nyserda.ny.gov/All-Programs/Programs/NY-Sun/Project-Developers/Residential-Small-Commercial-MW-Block/Become-a-Solarize-Installer) by NYSERDA.

NYSERDA reserves the right to request the applicant provide clarifying information.

**SO AGREED by the chief elected official of the applying jurisdiction, or his/her designee:**

Signature:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Print Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title/Position:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Jurisdiction:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_