**NYSERDA Clean Energy Communities Program**

**Solarize Campaign Scoping Document**

**Version 2**

This scoping document is intended for use by local government officials seeking to earn credit for the Solarize 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.

Solarize campaigns are locally-organized community outreach efforts designed to significantly increase residential and commercial solar installations in selected communities through market aggregation campaigns with competitively selected solar installers. These are short term (approximately 6-9 months, including planning and outreach) local efforts to bring together groups of potential solar customers through widespread outreach and education, and help these customers choose a solar installation company that is offering competitive, transparent pricing.

It is not necessary to complete this document if you can demonstrate direct municipal participation in current or previous rounds of NYSERDA Community Solar NY.

**Instructions:**

The first step to earn credit for this action under NYSERDA’s Clean Energy Communities Program is to send an email to cec@nyserda.ny.gov to work with a Clean Energy Coordinator to ensure all NYSERDA requirements are met including those outlined in the Solarize Scoping Document Terms and Conditions.

As an orientation, please review materials on the [Community Solar NY webpage](http://www.nyserda.ny.gov/All-Programs/Programs/NY-Sun/Communities/Solarize). Please also watch the video [Creating and Implementing Your Solarize Campaign](https://www.youtube.com/watch?v=VnIYTOrRApw).

Next, please complete this Solarize Campaign Scoping Document and submit it for review to cec@nyserda.ny.gov. The applicant is required to sign off on the Terms and Conditions at the bottom of this document to earn credit for this action.

Finally, to earn credit for the Solarize action, at least ten (10) solar customers must already have resulted from the Solarize campaign within your jurisdiction. A list of these should be submitted separately including the address, name of the installer, and either the date contract was signed, the date the project was installed, the date the installation was permitted, or the date the NY Sun incentive application was submitted.

If you have any questions or require additional information, please send an email to cec@nyserda.ny.gov and someone will get back to you.

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

**What is the name of the Solarize 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? Is your campaign focusing efforts on either commercial and industrial or low and moderate income customers? Also mention if your community is interested in participating in shared solar.*

**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 Solarize 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 solar companies 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—see Part 2). 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. The roles are described in the* [*Community Solar NY Guidebook*](http://ny-sun.ny.gov/Get-Solar/Community-Solar)*. Core Team members may not have financial relationships with solar companies 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 Solarize campaign. Describe the role each organization will play in the Solarize 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 Solarize campaign.**

Include population, number of owner-occupied residences, and current number of solar electric and solar thermal installations (see [Open Data NY](https://data.ny.gov/Energy-Environment/Solar-Photovoltaic-PV-Incentive-Program-Beginning-/3x8r-34rs) and [PowerClerk](http://nyserda.powerclerkreports.com/Default.aspx?ReportId=1) for information). Include any information that would be relevant to the scheduling of a seasonal Solarize campaign. For example, is your community a vacation destination, college town, consisting largely of renters, etc?

**Detail the local policies for solar installations in all the jurisdictions that will be served by the campaign.**

*Outline the permitting process for solar electric projects in all communities participating in the Solarize Campaign. Have the jurisdictions adopted the NYS Unified Solar Permit? Please note that adopting the Unified Solar Permit is a separate high-impact action under the Clean Energy Communities Program. Municipalities that adopt the Unified Solar Permit are eligible for up to $5,000, depending on population, through the Streamlined Permitting PV incentive to implement the new procedures. If you are not sure if your jurisdiction has adopted the Unified Solar Permit, please check NYSERDA’s official list of communities at* [*www.nyserda.ny.gov/CleanEnergyCommunities*](http://www.nyserda.ny.gov/modelcommunities)*.*

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

*Describe your community’s participation in Climate Smart Communities, NY-Sun PV Trainers Network, K-Solar, PACE financing, or NY-Prize. Has your community been in contact with a former Solarize campaign? Do you have plans to coordinate with another solarize campaign?*

**Describe the level of community interest in a Solarize campaign.**

*If you have conducted a survey or other preliminary outreach to gauge community interest, describe the survey, the number of responses, results, and priorities identified.*

**Part 4: Campaign Goals, Installer RFP, and Preliminary Marketing and Outreach Plan.**

**Submit Your Campaign’s Installer Request for Proposal (RFP) for NYSERDA Review and Approval.**

*Please watch the video* Selecting a Solar Installer *at* [*https://www.youtube.com/watch?v=0bgl-gHXPj8*](https://www.youtube.com/watch?v=0bgl-gHXPj8)*. The process for selecting a solar installer is also outlined in the* [*Solarize Guidebook*](http://www.nyserda.ny.gov/All-Programs/Programs/NY-Sun/Communities/Solarize)*. The installer(s) must be* [*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. The applicant must select a pre-qualified solar installer(s) through a competitive process using the program template RFP and guidelines, or one that is reviewed and approved by NYSERDA. Please find the NYSERDA template Installer RFP at the Community Solar NY website at* [*http://ny-sun.ny.gov/Get-Solar/Community-Solar*](http://ny-sun.ny.gov/Get-Solar/Community-Solar)*.*

**Campaign Goals**

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

|  |  |
| --- | --- |
| Number of Installations: |  |
| Total of kWh Installed: |  |

**Solarize Campaign Milestones**

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

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

**Marketing and outreach plan**

*Provide a detailed marketing and outreach plan for your Solarize 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.*

**Solarize Events – Residential**

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

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **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* |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**Solarize Events – Commercial**

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

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **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* |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**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.*

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

**E-Newsletters**

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

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

**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.*

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

**Websites**

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

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

**Social Media**

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

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

**Flyers/Banners/Mailings**

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

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

**Estimated Budget for Campaign Marketing and Outreach**

|  |  |
| --- | --- |
| **Expense** | **Estimated Cost $** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**NYSERDA Clean Energy Communities Program**

**Solarize 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 Solarize 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 Solarize campaign.
* The campaign is able to achieve campaign goals for new solar installations in the community and geography served.
* 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 to work with a Clean Energy Coordinator to ensure all NYSERDA requirements are met.
* The solar installer(s) for the Solarize Campaign was selected through a competitive process using the program template RFP and guidelines, or one that was reviewed and approved by NYSERDA.
* 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:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_