**New York State Energy Research and Development Authority (NYSERDA)**

**Community Choice Aggregation**

**Implementation Plan Template**

**Version 1**

Community Choice Aggregation (CCA) is a municipal energy procurement model that replaces the utility as the default supplier of electricity for virtually all homes and small businesses within a jurisdiction. CCA puts control of choosing energy supply in local hands. By pooling demand, communities build the clout necessary to negotiate fixed-rate, potentially lower pricing with private suppliers, and are able to choose cleaner energy.

CCA programs may be used to develop Distributed Energy Resources (DER) including local renewable energy projects, shared renewables like community solar, energy efficiency, demand response, energy management, microgrid projects and other innovative Reforming the Energy Vision (REV) initiatives that optimize system benefits, target and address load pockets/profile within the CCA’s zone, and reduce cost of service for participating customers. For more information on the REV initiative, please visit [www.ny.gov/REV4NY](http://www.ny.gov/REV4NY).

In New York State, CCA programs are authorized subject to Public Service Commission (PSC) approval of the CCA’s Implementation Plan, Data Protection Plan, and certifications of local authorization. It is intended that this template be completed and submitted by the CCA team as the CCA’s Implementation Plan. The purpose is to help municipal officials, CCA teams, NYSERDA, and the PSC clearly understand the CCA’s goals, milestones, and deliverables while helping to define the roles and responsibilities of project partners as well as to plan the CCA’s approach to public engagement, outreach, and education.

Additional tools and resources are available in NYSERDA’s CCA Toolkit.

You may submit a draft CCA Implementation Plan to NYSERDA for review prior to filing with the PSC by sending an email to cec@nyserda.ny.gov.

**Part 1: CCA Overview**

**CCA Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Communities Served**

Specify the geographic area that your CCA will serve. Include a list of village, town, city, or county governments to may potentially participate. Who are the intended participants/rate classes? Which utility territory?

**Goals**

State the short, medium and long-term goals for the CCA (i.e. cost savings, market clout, development of local energy resources, energy-efficiency efforts, demand response, increased use of renewable energy)?

**Approach**

Please describe a thorough, detailed, and sound strategy for accomplishing the stated goals.

**Part 2: Partners**

**Program Organizer**

The Program Organizer is typically the group responsible for initiating and organizing the CCA. This group will typically secure buy-in from local governments and engage in preliminary outreach and education around CCA. The Program Organizer may be an informal group, a non-profit organization, local government, or other third party. The Program Organizer and the CCA Administrator may be the same. The Program Organizer may not have financial relationships with an ESCO that may seek to be a supplier for the CCA. A designated individual will serve as the primary point of contact for NYSERDA. The Program Organizer should expect to make a significant time commitment to the CCA.

Name of Program Organizer:

Mailing Address:

First Name:

Last Name:

E-mail ::

Phone Number:

Title/Position:

**CCA Administrator**

The CCA Administrator is responsible for procuring and managing an ESCO contract on behalf of participating municipalities. The CCA Administrator will have substantial ongoing responsibilities during the development, implementation, and operation phases of the CCA program and should have both the knowledge and the capability to execute those responsibilities. The CCA Administrator will coordinate with NYSERDA, ESCOs, DER developers, and the utility and among the other partners.

Name of CCA Administrator:

Mailing Address:

First Name:

Last Name:

E-mail ::

Phone Number:

Title/Position:

**Local Government Contracts**

Please identify at least one local official in each participating municipality who will serve as that jurisdiction’s liaison to the CCA and NYSERDA.

Local Government Name:

First Name:

Last Name:

E-mail ::

Phone Number:

Title/Position:

Local Government Name:

First Name:

Last Name:

E-mail ::

Phone Number:

Title/Position:

Local Government Name:

First Name:

Last Name:

E-mail ::

Phone Number:

Title/Position:

Local Government Name:

First Name:

Last Name:

E-mail ::

Phone Number:

Title/Position:

Local Government Name:

First Name:

Last Name:

E-mail ::

Phone Number:

Title/Position:

Local Government Name:

First Name:

Last Name:

E-mail ::

Phone Number:

Title/Position:

**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 CCA. Describe the role each organization will play in the CCA.

Organization Name:

First Name:

Last Name:

E-mail ::

Phone Number:

Title/Position:

Organization Name:

First Name:

Last Name:

E-mail ::

Phone Number:

Title/Position:

Organization Name:

First Name:

Last Name:

E-mail ::

Phone Number:

Title/Position:

Organization Name:

First Name:

Last Name:

E-mail ::

Phone Number:

Title/Position:

**Service-Related Contact**

CCA customers should be provided a single point of contact to address service-related questions and concerns. During the period of CCA program development and implementation, this may be the Program Organizer, CCA Administrator, or one of the Local Government Contacts. Once an ESCO has been selected, the ESCO’s call center can also be used for this purpose.

Name:

E-mail ::

Phone Number:

**Part 3: Milestones**

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

|  |  |
| --- | --- |
| Implementation Plan Filed with PSC | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Data Protection Plan Filed with PSC | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Non-Binding Resolution Approved (optional) | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Local Laws Authorizing CCA Approved | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Certifications of Local Authorization Filed with PSC | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| MOUs/IMAs Approved | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Data Security Agreement with Utility Signed | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Utility Data Request(s) | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| RFB for Supplier Issued | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| CCA Public Outreach & Education Events | Date:\_\_\_\_\_\_\_\_\_\_\_\_Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Qualified Bidder Pool Selected | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Contract Award | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Opt-Out Letter Approved by DPS | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| Opt-Out Letter Mailed | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |
| CCA Service Begins | Date:\_\_\_\_\_\_\_\_\_\_\_\_ |

**Part 4: Public Outreach Plan**

It is important for municipalities to engage in robust outreach to properly inform and educate their residents on CCA so that they are able to make an informed decision about their energy supply.

Provide a detailed public outreach plan for your CCA by filling in the following tables. Describe potential outreach activities, venues, and partnerships. Examples are provided in the tables.

**Mailings**

Please identify mailings that will be used to spread the work about the CCA, events, or marketing of value-added services. Please submit drafts of written communications with residents, including preliminary drafts of opt-out letters. The opt-out letter must be approved by DPS prior to sending.

|  |  |  |
| --- | --- | --- |
| **Mailing Description** | **When** | **Who is Responsible?** |
| Opt-out letter on municipal letterhead and with municipal return address to all eligible customers that includes information on the CCAprogram and the contract signed with the selected ESCO including specific details on rates, services, contract term, cancellation fee, and methods foropting-out of the program. The letter will explain that customers that do not opt-out will be enrolled in ESCO service under the contract terms and that information on those customers, including energy usage data and APP status, will be provided to the ESCO. | At least two months prior to the commencement of service.  | CCA Administrator with approval of participating municipalities and DPS. |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**Events - Residential**

Consider community calendars; workshops at libraries, lunch & learns, upcoming community events, etc.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Completed?****(X)** | **Event and Venue(List events)** | **Date/Time** | **Result (number of attendees/ goals)** | **Notes** | **Assign roles** |
| **X** | Information Session; community library | 8/16/17; 7:00pm | 25 |  | 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 | 9/15/17; 2:00pm |  |  | Betty – bring handouts and sign up sheets; Doug – organize volunteers; Nancy – bring chairs and table |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**Events – Commercial**

Consider Lunch & Learns at employers, business events, and chambers of commerce meetings.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Completed?****(X)** | **Event and Venue(List events)** | **Date/Time** | **Result (# of attendees / goals)** | **Notes** | **Assign roles** |
| **X** | Lunch & Learn; FedEx office | 8/31/17; 2:00pm | 15 |  | Nancy – print brochures; |
|  | Chamber of Commerce | 10/15/17 |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**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 | Through launch | 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 the CCA.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Date** | **Item** | **Who** | **Completed?** |
| Non-profit partner |  | Webpage | Stan Johnson | X |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Social Media**

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

|  |  |  |  |
| --- | --- | --- | --- |
| **Site** | **Dates** | **Who/What Posted** | **Completed?** |
| CCA Facebook page | 8/12/17 | Betty/launch event | X |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Flyers/Banners**

Identify opportunities to use Flyers/Banners to spread the word about your CCA or events.

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