

Attachment C - Tenant Engagement Plan Template

Every RTEM+Tenants Service Provider must deliver tenant engagement services specific to the nature of the project, the building, and tenant configuration thereof. This Tenant Engagement Plan (TEP) must be submitted as part of the project application for NYSERDA review and approval. Tenant engagement services will support the recruitment, onboarding, and ongoing engagement of tenants throughout the lifespan of a project to ensure tenants have a positive experience as they leverage RTEM. Please provide comprehensive answers to every question listed below. NYSERDA reserves the right to ask for additional information as needed.

PROJECT INFORMATION

General

1. Provide a short paragraph describing the project.
2. Are you partnering with another firm to deliver tenant engagement services? If so, please list here with a description of their expertise. (NYSERDA reserves the right to ask for more information to assess the qualifications of any sub-contractor engaged in tenant engagement activities on this project application).
3. Have any tenant engagement activities been conducted to date? If so, please describe. If not, why not?
4. Has the landlord made a commitment to transparency, clearly stating what the energy goals of the building are, and is the landlord willing to share that information with tenants?
5. Provide any information on the leasing structure most prevalent in the building and how this might impact your tenant engagement activities.

Project stakeholders

6. Please list all project stakeholders, including, but not limited to:
 - Project champions within the landlord organization and to what extent will they facilitate tenant communication/engagement.
 - Tenants that have already opted into the RTEM+Tenants Program.
 - Other tenants of interest that you plan on reaching out to. Indicate the level of involvement of each tenant at this point in the project application process. *Please fill out the table in Appendix A, located at the end of this document.*
 - Others
7. Have you already conducted stakeholder interviews? If not, when do you expect that you will begin such activities? *Please provide a list of questions that will be used for these stakeholder interviews, and if available, an organizational chart for each tenant organization.*

Barriers, opportunities and risks

8. Identify barriers and/or challenges, both current *and* anticipated, on this project. How are you planning to address these barriers? Be specific.
9. Identify areas of opportunity with this project and help NYSERDA understand how these will help you build the value proposition of this project to current and prospective project stakeholders. Be specific.
10. Identify any risks associated this with project and describe your risk management strategy.

RECRUITMENT STRATEGY

11. Describe any tenant engagement practices currently in place at the property.
 - Explain how you are planning to leverage existing practices to further the goals of this project.
 - State how you will coordinate efforts with the landlord/property manager on site.
12. Describe your approach to engaging tenants on 1) novel energy management strategies, and 2) describe how you would provide technical support in expanding tenant participation in the Program from submetering inclusion only to something more comprehensive (i.e. lighting control, plug load monitoring, occupancy monitoring, etc.)?
13. How will you promote awareness of the Program and its benefits to tenants who haven't opted into the Program at the application stage of this project? Please be specific about how you would recruit tenants who haven't been approached yet.

ONGOING ENGAGEMENT

14. Describe the communications strategy at the core of this engagement plan. Be sure to provide details and explain who you plan to communicate goals and accomplishments to project stakeholders.
15. Describe how you will maintain tenants engaged throughout the duration of the project and beyond, to ensure persistence of savings over the life of the lease.
16. How will your engagement plan elevate the user experience?
 - Map out the customer journey and explain how you will support the customer throughout.
 - Highlight any innovative ways you will use to communicate, engage, and educate.
17. Describe the metrics you would use to determine if this project is successful at the end of the RTEM+Tenants project period.

APPENDIX A – PROJECT STAKEHOLDERS

Please list all project stakeholders in this table. Consultants may create their own table, however all information contained in the table below must also be provided.

Company	Project Role	Main point of Contact	Title	Email	Phone	Lease type	Engagement Level	Meeting Scheduled

Notes:

Company: Company name

Project Role: Landlord, Tenant, Property Manager, or other role

Main point of contact: Name of contact person, with title, email and phone number

Lease type: Full service gross, modified gross, triple net, rent inclusion

Engagement level: Opted in, Interested, Not Engaged Yet.

Meeting scheduled: Yes/No