



Resource Guide to 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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NY-Sun

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Introduction

Purpose of This Guide.

Solarize campaigns bring together groups of potential solar customers through widespread outreach and education, and help customers choose a solar offer. Solarize started in 2009 as a grassroots effort in Portland, Oregon and since then, dozens of communities in New York and across the nation have run successful Solarize campaigns.

Since 2015, communities across New York have led Solarize campaigns with support from the New York State Energy Research and Development Authority (NYSERDA) through NY-Sun. To date, thousands of New Yorkers have attended solar workshops and community events, and hundreds of households and businesses are going solar as a result. To learn more about past Solarize campaigns and their accomplishments, visit the Solarize Campaign Map at nysenda.ny.gov/solarize-map.

The Resource Guide to Solarize Campaign Success is a roadmap for community leaders who want to make going solar easier and more affordable for their neighbors.

In the following sections, community leaders will be guided through each step of running a successful rooftop solar or community solar Solarize campaign. The guide provides information for developing a core team to help run the campaign, conduct outreach, review installer or developer bids, and celebrate successes. In addition, there is guidance for releasing an RFP, managing the relationship with the selected installer or developer, and reaching out to local media to promote the campaign and increase engagement with the community.

How To Use The Guide.

This guide is meant to be used throughout the entirety of the campaign. The content is organized to follow the path of a typical Solarize timeline. To aid in a successful campaign, team leaders are encouraged to review the guide in whole or consult it by section as the campaign progresses.

What is NY-Sun?

New York's solar offerings, shown below, are unified under one initiative called NY-Sun.

NY-Sun Incentive Program provides financial support for solar electric systems installed by a NY-Sun-certified contractor.

The **Affordable Solar Incentive** Incentive is available for income-qualified homeowners and works just like other NY-Sun incentives, except it requires minor low-cost energy efficiency upgrades to your home.

With **Community Solar**, solar panels are installed on a site in your community. Community members subscribe to a share in a community solar project. The clean energy generated from the project is fed into the local power grid and as a subscriber, you receive credits on your electricity bill lowering your monthly electricity costs.

Solar for All improves access to solar for low-income households across New York through no-cost community solar subscriptions.

Solarize Campaigns

Solarize campaigns help homes and businesses go solar through locally organized community outreach. Solarize members can collectively negotiate rates, select an installer or community solar developer, and decrease the up-front costs of going solar.

There are two kinds of Solarize campaigns:

Rooftop Solar

Rooftop solar Solarize campaigns focus on getting a group of homes and businesses in an area to install solar panels directly on their properties. Rooftop solar installations offer a way to harness the power of the sun through panels installed on the roof of the home or business.

Throughout this guide, the term solar installer will be used when referring to rooftop campaigns.

Community Solar

Community solar Solarize campaigns focus on getting a group of homes and businesses to subscribe to a community solar project in your area. Community solar projects allow renters, homeowners, and businesses to benefit from solar without having to install solar panels on their rooftop or property. As long as your community members are located in the same utility territory as a project, they should be able to receive the benefits of community solar.

Throughout this guide, the term solar developer will be used when referring to community solar campaigns.

NYSERDA Support

Solarize campaigns are supported by NYSERDA throughout the campaign. NYSERDA support includes:

- Resources including installer request for proposal templates for rooftop solar PV and community solar campaigns, marketing materials, an outreach toolkit, and tips for managing traditional media and social media.
- Clean Energy Community (CEC) Coordinator support.
- Prequalifying solar installers (see RFP templates for details).
- Hosting an informational workshop/webinar about the process.
- Providing a technical review of proposals by NYSERDA's technical assistance provider. Please note that some of this support will be provided through online webinars.



Planning Your Solarize Campaign

It is important for Solarize campaigns to go through a campaign planning process. This section reviews the different groups involved in a Solarize campaign, provides an example campaign timeline, discusses the typical Solarize team and their core responsibilities, and reviews the importance of solar ambassadors.

Groups Involved in Solarize Campaigns

Solarize campaigns often involve several different types of groups including the local community, NYSERDA, the selected solar installer(s) or developer(s), and the solar customer. The figure below provides a snapshot of the typical groups involved in a Solarize campaign and their potential roles.

Local Community	NYSERDA	Solar Installer	Solar Customer
<ul style="list-style-type: none"> • Solar Ambassadors • Engagement and Grassroots Groups • Event Hosting • Communications Strategies 	<ul style="list-style-type: none"> • Solar Incentives • Program Support • Technical Assistance 	<ul style="list-style-type: none"> • Turnkey Installation • Ownership Options • Competitive Pricing 	<ul style="list-style-type: none"> • Get Free Site Assessment • Decide on Ownership Model • Tell Friends & Neighbors

Typical Solarize Timeline

Months 1 to 2

Pre-launch: Team Creation, Outreach and Marketing Planning, Installer/Developer Selection

Months 3 to 4

Launch: Kick-off event, Outreach and Marketing Begins



Months 5 to 6

Maintaining Campaign Momentum: Public Outreach through Educational Events, Bi-weekly calls, Media Coverage



Months 7 to 8

Campaign Ends: Celebrate Success



Solarize Team

Define Solarize Team Roles & Responsibilities

A campaign team will include a core team of volunteers along with other individuals and organization that will have discrete roles and will be involved throughout the campaign (e.g., solar ambassadors, NYSERDA, solar installer/developer, solar customer). Every team member should have a role, so that everyone on the team feels included and empowered to contribute. Dividing tasks/roles will help manage the workload and avoid volunteer burnout. Roles should include:

Role	Responsibilities
Project Manager/Team Leader	<ul style="list-style-type: none"> • General oversight and management of Solarize team • Coordination of other team leads • Setting bi-weekly agendas/meetings • Point of contact for installer/developer
Solar Installer/Developer Selection Committee	<ul style="list-style-type: none"> • Group of community members who evaluate bids, interview, and select the installer/developer for the Solarize campaign
Recruitment Lead	<ul style="list-style-type: none"> • Coordinating solar ambassadors (community members who have experience with solar, usually for their homes) • Recruit additional volunteers to assist with the campaign
Communication & Outreach Lead	<ul style="list-style-type: none"> • Lead communications and outreach • Coordinate outreach calendar • Participate in meetings with installer/developer • Build and maintain customer database in coordination with the Team Lead
Media Outreach Liaison	<ul style="list-style-type: none"> • Coordinating media outreach (print, radio, social)
Event Coordinator	<ul style="list-style-type: none"> • Scheduling workshops/events • Taking pictures at events and maintaining photo album
Community Outreach Coordinator	<ul style="list-style-type: none"> • Emailing attendees/invitations • Coordinate canvassing, lawn signs, and other activities
Additional Community Volunteers	<ul style="list-style-type: none"> • Recruited to help carry out activities of the core team

The Importance of Solar Ambassadors

People want to hear from other people who have gone solar. When potential solar customers can relate to another person in their community who has already gone 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 the University of Connecticut have studied the patterns of solar adoption in communities across Connecticut¹. 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 go 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.

¹<https://academic.oup.com/foeg/article/15/4/815/2412599>

Pre-Launch Campaign Outreach and Marketing Planning

Campaign Outreach and Marketing Planning

Build an Outreach Strategy

Prior to launching your Solarize campaign, you'll want to consider your outreach strategy. With your team, complete the campaign tracking form template which can be found on the NY-Sun website. In building your outreach strategy the campaign will want to:

- Define a target audience(s).
- Set goals.
- Identify outreach opportunities (e.g., canvassing, bill inserts, lawn signs, community events).
- 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.
- Incorporate an educational component for every outreach strategy.
- Stay active! Create and update a community Solarize web page, send email updates about campaign successes and events to the customer lead list, and encourage the installer(s) to participate in events when possible.

Forging Partnerships and Tapping into Existing Social Networks

Developing key partnerships with existing organizations is essential to spreading the word about the campaign. Campaigns may want to identify influential organizations in the community that are effective in connecting with people. These organizations often have established communication networks and well-developed constituencies. They may not always 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.)

In exchange for agreeing to include messages about the campaign to constituents, 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.

The campaign may want to consider:

- What organizations are influential in my community?
- With what organizations do team members have established relationships?
- What organizations share a common message or interest?

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.

Outreach Ideas and Activities

There are many different types of outreach activities campaigns can undertake. Based on previous Solarize campaigns, some of the most effective outreach ideas and activities campaigns can consider include:

- **Solar Tours** – Solar owners agree to open up their homes to show visitors their solar panels and associated equipment (inverters, meters, etc.) and 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. Tours to nearby solar facilities could also be a good opportunity to teach visitors about community solar, how it works, and the potential benefits. These events are a good opportunity to display information about rooftop solar or community solar Solarize campaigns, 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 the 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.

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.*

- **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 with the campaign.
- **Workshops/Webinars** – Coordinating a workshop or webinar can be a good way to educate large numbers of people about rooftop solar and community solar focused topics, such as the contracting process, financing options, and how the savings show up on their utility bill.
- **Continuing Engagement** – Send follow-up emails after events to people who have not requested a quote or have not responded to a quote.
- **Stay in Touch** – For all activities, always collect contact information for everyone attending events. Enter their information into database so that you can invite them to subsequent events and provide them updates about the campaign.



Solarize Canton at the Dairy Princess Parade

Developing a Local and Regional Media Plan

Mapping out all the potential media outlets, thinking through press-worthy events or campaign milestones, and developing relationships with reporters early in the campaign will prove advantageous as a low-cost strategy for spreading the word about Solarize. Campaigns should consider:

- Developing relationships with 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 and connect with those sources. Follow these contacts on social media, if they are using it.
- Identifying press release-worthy events including campaign launch events, the first live installation, a solar tour, and the end of the program.
- Providing print-ready articles with visuals and graphics that easily can be placed and run as is in local and regional publications – articles in the local newspaper are one of the strongest ways to drive traffic to your website.
- Developing graphics – Make it easy – provide pre-made/design infographics that tell your campaign’s story and are print-ready.
- Following-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.
- Taking many pictures at your events (including a photo that includes the name of your Solarize program).
- Placing photos on website, Facebook, and Twitter feeds – a photo and a post-event release make it more likely to get printed after the fact.
- Listing events on the Event Calendar section of local papers.

Using Media to Promote Success

Campaigns may want to explore specific types of media to promote success, including:

- **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 NYSERDA 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 NYSERDA website.
- **Event Calendars** – Many media outlets have calendars on which you can list Solarize events.

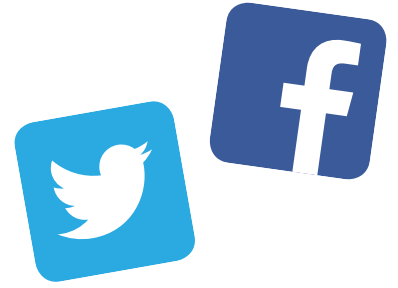
Tell Your Community’s Solar Story

It’s important for campaigns to effectively tell your campaign story. Campaigns should consider:

- As a team, decide on the message that you want to convey: Why is it important for your community to expand solar?
- As an individual, explain why you personally wanted to participate in Solarize — personal stories matter and inspire.
- Include messaging from community leaders (spoken and written) because when trusted leaders endorse the campaign, more people will consider solar.
- Include images such as photos from events or a customer in front of their solar PV system.
- Know your intended audience and clearly understand the purpose of telling the story.
- Be deliberate about when story telling happens for example, once the campaign hits an important milestone.
- Keep resources updated to ensure that they share the most impactful information.

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 NYSERDA's website, and consider the following:



- Is there a team member who uses social media regularly? This person should be responsible for posting to Facebook and Twitter throughout the campaign.
- Are there existing social media platforms that can be leveraged? If so, adapting these platforms for the Solarize campaign may be easier than starting from scratch.
- If they don't already exist, set up Facebook and Twitter campaign pages, which are managed by volunteer(s).
- Start early in the campaign to build an audience and tap into the social media of partners.
- Use pictures in most of your posts.

Creating Compelling Marketing Materials with Templates Provided

NYSERDA provides several template marketing materials that can be found on the NYSERDA website that campaigns can use. As campaigns edit the template marketing materials, there are a few best practices campaigns may want to keep in mind:

- Don't clutter your materials (flyers, banners, etc.) with too much content.
- Remember, you want to engage people with just enough information, so they want to learn more – start with the most important information first.
- Bullet key selling points rather than describing them in paragraphs.
- On marketing materials, be sure to highlight:
 - *Discount on the price of solar*
 - *Pre-screened solar installers or developers*
 - *Reduced energy costs*
 - *Deadlines, as that helps prompt people to act*
 - *Website URL (Goal is to get viewers to attend a meeting or go to the website to learn more)*
 - *Provide a clear and easy way to get questions answered*
- Be sure to use a hierarchy of information and sizing to ensure easy readability.
- Make the logo highly visible, usually in the lower right corner. Ensure that all marketing materials are showcasing your brand, so it becomes recognizable.
- For the website, purchase a vanity URL – an easy to remember campaign domain name, such as “www.solarschuyler.org.” Include solar testimonials and local, recognizable pictures.

Creating Visibility for the Campaign

Campaigns will want to consider where best to place marketing materials to create as much visibility for the campaign as possible.

- Identify high visibility locations across your community to place banners, yard signs, and flyers. Check with the 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 them with a tax or water bill.

Solar Installer/Developer Selection Process

Selecting a solar installer/developer (or installers/developers) for your campaign is one of the most important roles that your core team has to play. The installer/developer 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/developers 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.

Solarize campaigns are supported by NYSERDA throughout the process by:

- Prequalifying solar installers (see RFP templates for details).
- Providing a template Request for Proposal (RFP) for solar installers or developers.
- Hosting an informational workshop/webinar about the process.
- Providing a technical review of proposals by NYSERDA’s technical assistance provider. Please note that some of this support will be provided through online webinars.

This support will aid the community in making 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 resources in making the best decision for your campaign. Note that NYSERDA cannot provide legal advice or act as legal counsel to any community.

Things to Know Before the RFP Process

New York has established several policies to support the growth of solar and to proactively protect solar customers. It is helpful to be aware of these policies as you begin the installer/developer selection process and launch the campaign:

Rooftop Solar

For every kilowatt hour of electricity a solar system sends to the local power grid, the customer receives a kilowatt hour credit on their utility bill. Each month the customer will receive their utility bill and the electricity the solar system sent to the power grid will appear as credits on their bill, lowering their electricity costs. In the summer months, their system will likely contribute more electricity to the local power grid than they use. During these months, their credits roll over to the next month, like roll over minutes on a cell phone, and they can use these credits to pay for their electricity bill at a later time. On the customer’s annual true up date, if any credits remain, the utility will pay the customer for those unused credits.

Community Solar

The electricity generated from a community solar project is sent to the local power grid. For every kilowatt hour of electricity a subscriber’s share in the community solar project produces, they receive a credit on their utility bill. Each month the subscriber will continue to receive their monthly electricity bill from their utility. The electricity that their community solar share produces will appear as credits on their utility bill, lowering their monthly electricity costs. In most cases, they will also receive a separate bill from their community solar developer. The credits on their electricity bill should cover the cost of the developer’s bill meaning that they will be paying less than they normally would for electricity. In summer months, their share of the community solar project will earn more credits and any unused credits at the end of the month will roll over into the following month and can be rolled over year-after-year.

Consumer Protection Standards

New York has adopted a set of consumer protection standards for the solar market called the Uniform Business Practices for Distributed Energy Resource Suppliers (UBP-DERS). The rules outline the responsibilities and requirements for companies providing rooftop solar installations and community solar services to customers. The rules require companies to register with the Department of Public Service (DPS) and include a standard disclosure statement, detailed marketing requirements, procedures for handling customer inquiries and complaints, and penalties for violations. Companies must also keep records of customer inquiries and meet reporting requirements, including submitting an annual report to DPS providing data on the previous year. The rules are intended to protect customers from any abusive or fraudulent practices.

Solar installers and developers participating in Solarize campaigns must abide by these rules. If your Campaign confronts any customer protection issues, you should file a complaint with the DPS as well as notify NYSERDA.

Using the RFP Templates

The Rooftop Solar and Community Solar RFP Templates are based on successful models from New York State and elsewhere. The RFPs are meant to provide clear guidelines and expectations for solar installers interested in participating in a rooftop Solarize campaign and developers interested in participating in a community solar Solarize campaign. Both RFPs aim to encourage responses that are detailed but easily understood. They are also meant to make the process as straightforward as possible for installers and developers, who are investing their time and resources to respond.

Solarize is not one-size-fits-all. Using these templates 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 developers, 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.

Rooftop Solar

The overall structure of Solarize rooftop campaigns can vary depending on the Solarize team's goals and the local context. The Rooftop Solar RFP template allows for a Solarize structure with a single selected installer or one with multiple selected installers. Some of the pros and cons of these approaches are described in the following chart.

Pricing Structure	Pros	Cons
Single Installer: Only one installer (or installer team) will be selected as the preferred installer for the Solarize campaign.	<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.
One or More Installers: Each selected installer (or installer team) up to a maximum of three provides their services.	<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.• More challenging to explain to campaign participants.

The Rooftop Solar RFP template allows solar installers to offer different pricing options to Solarize campaigns. The basic options are summarized below.

Pricing Options	Description	Details
Lease or Power Purchase Agreement (PPA)	Pay no upfront fee for a solar PV system and instead pay a monthly fee (either a fixed fee or a fee for each kilowatt hour of electricity generated by the system).	<ul style="list-style-type: none"> • Little to no up-front cash layout • “Pay-as-you-go” subscription • Different term options
Purchase	Buy the solar PV system for an upfront fee.	<ul style="list-style-type: none"> • You own the panels located on your roof • Financing options usually available • Typically more savings over the long-term • Take advantage of tax incentives

Community Solar

The Community Solar RFP template allows campaigns to offer their community the option to participate in community solar.

Developers offer shares in upcoming and/or existing community solar projects and determine which plans to offer to community members. The basic options are described below.

Membership Types	Description	Details
Subscription Plans	Pay no upfront fee for a solar share and instead pay a monthly fee. Most developers offer this kind of plan.	<ul style="list-style-type: none"> • Little to no up-front cash layout • “Pay-as-you-go” subscription • Different term options • Typically a guaranteed percentage discount for the duration of the subscription
Purchase Plans	Buy a solar share for an upfront fee. This kind of plan is less common, and many developers do not offer it.	<ul style="list-style-type: none"> • You own the panels located in the community solar project • Financing options typically available • Potentially greater savings over time • Eligible for tax incentives

Once again, the RFP templates are provided for your guidance. Your team is responsible for their use, the installer or developer selection process and decisions, and the implementation of your Solarize campaign.

Rooftop vs Community Solar

The main differences between rooftop solar Solarize campaigns and community solar Solarize campaigns are summarized below. Understanding the main differences between rooftop and community solar campaigns will help your team decide which type of Solarize campaign is most appropriate for your community.

Rooftop Solar	Community Solar
Elible Participants	
<ul style="list-style-type: none"> • Home owners, businesses • Roof and sunlight access must be suitable 	<ul style="list-style-type: none"> • Home owners, renters, businesses
Locations	
<ul style="list-style-type: none"> • Rooftop of the home owner or business owner 	<ul style="list-style-type: none"> • Ground mounted on leased land or rooftop located in the community's utility territory
Program Models	
<ul style="list-style-type: none"> • Lease or PPA 	<ul style="list-style-type: none"> • Subscription
<ul style="list-style-type: none"> • Purchase 	<ul style="list-style-type: none"> • Purchase
Billing and Savings	
<ul style="list-style-type: none"> • Receive credits on your monthly utility bill for solar production sent to the local power grid • Utility administers credits on a monthly basis • Credits roll over month to month • At the end of each year any excess credits are paid out by the utility 	<ul style="list-style-type: none"> • Receive credits on your monthly utility bill for the solar production from your solar share sent to the local power grid • Developer provides solar production information for each customer to the utility • Receive a monthly bill from your utility and a monthly bill from your developer • Utility administers credits on a monthly basis • Credits roll over month to month and year to year
Contract Duration	
<ul style="list-style-type: none"> • Owned: N/A • Lease/PPA: Variable, usually 20-25 years, usually a termination fee 	<ul style="list-style-type: none"> • Variable • May or may not be a termination fee
Operations & Maintenance	
<ul style="list-style-type: none"> • Owned: Up to system owner • Lease/PPA: Responsibility of solar installer 	<ul style="list-style-type: none"> • Responsibility of developer
Moving or Selling the Property	
<ul style="list-style-type: none"> • Owned: System may be passed on to next homeowner and value of system included in purchase price • Lease/PPA: Lease or PPA may be taken over by next home owner 	<ul style="list-style-type: none"> • Purchase or Subscription: As long as the purchaser or subscriber stays within the same utility territory, the plan carries over

Evaluating Bids

When creating your core Solarize team, you will identify a Solar Installer/Developer Selection Committee. The committee will:

- Organize the bids and share them with the NY-Sun-identified technical assistance provider for review.
- Confirm a schedule for review and set up a time to discuss the bids with the reviewers and selection committee.
- Determine if any RFP criteria are more or less important to the community.
- Based on the team review and conversations with the technical assistance providers, decide if and which installers or developers you want to interview.
- Select one or more installers or a developer to work with your community.

Remember, the selection is solely up to the Solar Installer/Developer Selection Committee. The technical assistance provider will answer questions and provide an objective review of the bids but will not make recommendations as to which bid to select.

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 templates require 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 NYSERDA.

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

The NY-Sun team will be providing all eligible solar installers with a list of new campaigns. 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.

We also recommend 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 on the Solarize team but can still participate in the campaign as a customer or solar ambassador.

Strategies for Working with your Solarize Installer(s)/Developer(s)

Rooftop solar Solarize campaigns will work with one or more solar installers. In the case of a community solar Solarize campaigns, the community will select one or more solar developers. Installers/developers are integral Solarize team members and it is important to involve them in every step of the campaign. Campaigns should establish and communicate expectations early on in the process and create rules of engagement and conduct between the Solarize community and the installer/developer.

Campaigns should make it clear who is responsible for carrying out the following roles:

Type of Campaign	Details
Applicable to Rooftop and Community Solar Campaigns	<ul style="list-style-type: none"> • Define responsibilities for the installer/developer and community team. For example, who is responsible for solar education? What marketing materials are to be used? Will the installer/developer provide any additional marketing materials? • Decide on several talking points for the campaign. How should the installer/developer represent the campaign on their website and their materials? • If there are multiple installers/developers, how will they split or share leads? Can they split the cost of a town mailing? • Consider creating a shared Google folder or other information sharing platform to easily share information between the installer/developer and core team members.
Applicable only to Rooftop Campaigns	<ul style="list-style-type: none"> • What is the expectation for lapse of time between customer contact, lead delivery, and installation? How will this be communicated to the Solarize community volunteers and how will data be shared with them?
Applicable only to Community Solar Campaigns	<ul style="list-style-type: none"> • What is the expectation for lapse of time between customer contact, lead delivery, and project completion? How will this be communicated to the Solarize community volunteers and how will data be shared with them? • Ensure that the developer's sales team is clearly communicating the project timeline and when customers can expect to see changes on their utility bill. • Consider signing a memorandum of understanding (MOU) with the community solar developer to clearly outline the outreach and marketing roles and responsibilities of the developer and the campaign team.



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

Solar Installer/Developer 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 and developers who are nimble and able to adjust to this volume are often the most successful. Some of the more successful installers and developers have streamlined their best practices to include the following:

Type of Campaign	Details
Applicable to Rooftop and Community Solar Campaigns	<ul style="list-style-type: none"> • Immediate customer contact via phone and/or email within a couple of hours or same day. • 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, the installer and developer should bring financing options to the customer. • Maintain regular communication and provide updates to customers on the status of their project. • Knowledgeable sales representatives - installer and developer representatives should be able to answer a wide array of questions from customers. Check out the NYSERDA website for a list of commonly asked questions for community solar and rooftop solar. The Solarize marketing materials also include a rooftop solar FAQ document.
Applicable only to Rooftop Campaigns	<ul style="list-style-type: none"> • Streamlined quote delivery – installers should prepare a quote in advance of a site visit and be 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. • Ask customers to sign a letter of intent or commitment. If the quote is not finalized at the site visit, the installer can ask the customer to sign a non-binding letter of commitment. 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.
Applicable only to Community Solar Campaigns	<ul style="list-style-type: none"> • Streamlined quote delivery – developers should be prepared to discuss the different plan options, answer a wide array of questions, and quickly deliver a quote to prospective customers. • Have a plan in place for when eligible projects become fully subscribed. How can prospective customers learn about future available projects? Will they be added to a waitlist and contacted directly by the company or do they need to regularly visit and track the company’s website?

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 or community solar developer 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.

Strategies for a Successful Launch

- Plan launch event with enough advance notice – at least one month.
- Build excitement for the event – invite media, email invitations, leverage social media, distribute flyers.
- Advertise on community/partner websites and newsletters.
- Set up registration for the event to track those who attend and allow re-marketing.
- Send a press release about one week before the event.
- Plan to have a local leader speak at the event.
- Hold interviews with local media.
- Invite solar installers/solar developers and solar ambassadors to attend.
- Serve light food/refreshments.

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 full understanding of the campaign and solar energy, as well as to meet the installer(s)/developer(s).

2) Launch Celebration/ Meet & Greet – This style of event is usually shorter in length and more of a party atmosphere. There are a few informal remarks from Solarize organizers, local leaders, and current solar owners and it is a chance to meet the installer(s)/developer. Educational workshops are usually planned a week later to give people more in-depth information.

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



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)/developer(s).
- Have a solar ambassador give testimonial.
- Create a festive, fun atmosphere.
- Outline what to look for in the future to build excitement.

Ongoing Campaign Management & Maintaining Campaign Momentum

Team Meetings

Holding regular, scheduled calls with Solarize members and installer(s)/developer(s) 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)/developer(s) provide updates and review metric tracking.
- Talk about any problems, concerns, opportunities.
- Develop talking points for campaign volunteers so messaging is consistent.
- Review upcoming outreach events to see if there are enough planned for the next two to four weeks (or whether too much activity is planned).
- Prepare 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) is keeping up with site visits and customer contact.
- Make plans to take photos of events or scheduled installations.

Tracking and Monitoring 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.



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



Solarize Canton volunteers at event.
Photo courtesy of Solarize Canton

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

Based on the experience of many New York State Solarize campaigns, here are the top five avenues by 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, news 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. The homes of people who own solar and town properties are good places for signs. Each town has a different policy regarding signage, so check feasibility 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.

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**

“Southern Adirondacks for Solar had a great initial Solarize Campaign in 2018. In addition, the Town of Queensbury’s Climate Action Committee will continue to promote renewable energy in Warren County, including community solar projects”.

– **Kathy Bozony, Southern Adirondacks for Solar Team Lead**



Campaign End

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, to 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.*
- Keep the solar momentum.
 - *Hold a solar tour of the new solar owners' homes and then an annual solar home tour thereafter.*
 - *Ensure community solar participants with contracts are kept updated regarding the status of the project and the timeline for when they can expect a change on their utility bill.*
 - *Coordinate an event for when the community solar project is completed or turned on.*
 - *Communicate with community members who were unable to participate in the community solar project but still want to go solar or participate in a future community solar project. Engage the developer for support with this.*

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

Email Us

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

