



Launch Community-wide Solar & Efficiency Campaign

For municipalities that want to encourage residents to think comprehensively about their energy use, it makes sense to bundle both efficiency and solar outreach into one program in which residents are encouraged to get a energy assessment at the same time as a solar site assessment.¹ A community collective purchasing model can be used to bundle solar and energy efficiency services and to overcome market barriers, including high upfront costs, customer inertia, and complexity in the purchase and installation process. A collective purchasing model encourages buying energy goods and services in bulk at the community or neighborhood level, which helps drive down costs. Further, this model of offering pricing as a limited-time-only proposition often motivates residents to act.

By administering a competitive procurement process for efficiency and solar services, a municipality can instill confidence in its constituents that the selected vendor is qualified to meet the needs of the community and will serve the public interest. This strategy outlines how to design and conduct a local outreach program to increase participation in MassSave's audit and retrofit opportunities, as well as to inform residents and businesses of solar opportunities and encourage the use of financial incentive options for solar installation.

This strategy is largely based on the Massachusetts Clean Energy Center's [Solarize Mass](#) model.

Program Implementation Steps

1. Design Program and Identify Core Coordination Team

Early on it is important to identify a core program coordination team with responsibilities for program management, volunteer coordination, and technical support. This team should develop a timeline and work plan for the entire course of the program prior to issuing a solicitation or beginning outreach. Depending on resource availability, it may make sense to delegate program management responsibilities to municipal staff and volunteer coordination/outreach efforts to the Energy Committee. Due to the intensive nature of this

¹ The model being proposed could most likely work for businesses as well, but will require a review of the procedures for connecting businesses to efficiency opportunities.

campaign, it is important to clearly identify who is responsible for each task. Such an effort usually requires municipal staff and volunteers to have specific roles to ensure that the program is properly organized and implemented. Every program will vary, but based on past Solarize campaigns, communities spend 400 – 600 volunteer/staff hours over a span of around seven months (from the time that they are chosen for Solarize to the end of the program).

Specific responsibilities that will need to be assigned before launching the program include:

- Writing the program RFP and managing the procurement process
- Reviewing program bids and selecting the vendor
- Developing an outreach plan
- Recruiting volunteers for outreach efforts
- Managing outreach efforts
- Answering resident questions
- Coordinating with vendor on a regular basis

In addition to municipal staff and volunteers taking on these responsibilities, other stakeholders can also support implementation in a variety of ways:

- **State government/utility** – Identify points of contact at the utility, Massachusetts Clean Energy Center, Department of Energy Resources, and/or Department of Environmental Protection who are able to answer questions and point the program coordinator to helpful resources. Municipal leaders and volunteers who participated in past Solarize Mass programs may also be able to offer guidance.
- **Designating a “Coach”** – Dedicate a volunteer from the Energy Committee or the public at large who either has pre-existing knowledge of home efficiency and solar projects or is willing to do research, and can be available to answer questions and “coach” residents on participating in the program.
- **Consultant** – Hire a separate consultant who can help with technical aspects of the program, ranging from drafting and issuing an RFP to providing customer support during the outreach and installation phases of the program.

Note: If program funding is a challenge, organizers may want to consider assessing a small fee for participation, either by building a per-watt fee into the contractor’s scope of work (for solar installations) or by charging a flat participation fee, both of which would be passed on to the customer. The funds collected can go towards producing marketing materials for the program and associated overhead costs. These fees are best collected as part of a single bill

issued by the contractor, but any process chosen for fee collection should be explicitly agreed upon in any Memorandum of Understanding signed between a community and a contractor. In general, charging an administrative fee will not affect the ability of a vendor to offer competitive pricing, as the infrastructure of a community collective model allows them to save money on marketing.

2. Establish Program Schedule and End Date

Once the program design has been finalized, it is crucial to establish a program schedule and end date. A schedule with a fixed end date is an effective framework that will allow the program coordinator to manage expectations and ensure that the work that the team has set out to accomplish is reasonable.

3. Build Partnerships and Recruit Volunteers

The program coordinator should first identify strategic partners that can help with outreach for the program and may be able to offer volunteers for other components of program administration (including serving on the Selection Committee or hosting educational events). Such partners could include the NorthEast Sustainable Energy Association (NESEA), community groups and local nonprofits, local manufacturers of solar equipment, churches, rotary or other service clubs, credit unions or local banks, and schools. It may be helpful to advertise widely for various volunteer needs (from program design to outreach coordination to vendor selection) in neighborhood papers, at public committee meetings, through formal presentations, and through word-of-mouth.

4. Issue RFP and Select Vendor(s)

- **Assemble Selection Committee** – A selection committee could include representatives from community groups that are committed to help with outreach, municipal staff, Energy Committee members, or representatives from state agencies or National Grid. The goal should be to represent a diverse group of interests and include particular knowledge of the community and its residents, as well as (if possible) expertise on home performance contracting and solar PV systems/solar developers.
- **Draft RFP** – MassCEC offers [sample RFPs](#) for its Solarize Mass program, into which language for requesting efficiency services, such as conducting MassSave audits, should be integrated if desired. Communities that have completed similar programs can also be a resource, as many have issued RFPs for and/or signed MOUs with companies to deliver these types of services to their residents. Some factors to consider when drafting the RFP include:
 - Allowing companies to bid on either one or both services (efficiency or solar), and whether an award will be made to one, two, or more than two vendors. (*When*

considering this point, it is important to think about the value added to having a vendor or a team of vendors provide efficiency and solar opportunities at the same time.)

- Requiring that vendors bidding on the efficiency component be certified MassSave home performance contractors.
 - Requesting tiered pricing. Since average system costs decrease for the vendor as more homeowners enroll, vendors typically offer a five-tiered pricing model to incentivize larger volumes of customers to sign on. Customers who sign on under the lower tiers will still receive the cost discounts once a higher tier has been reached.
 - Specifying how the vendor should manage its contact database. Will the vendor need to submit frequent reports on outreach numbers/follow-up work? Will leads be collected by the municipality and turned over to the vendor or will the vendor collect leads directly?
 - Allowing bidding vendors to offer additional services such as low-interest financing for home efficiency projects.
 - Requiring bidding vendors to develop a plan for community engagement and recruitment and be responsible for marketing the program as a whole, in addition to their own services.
- **Interview Top Candidates and Select Vendor(s)** – Procurement for these services is not subject to Chapters 30B or 25A of Massachusetts General Law, but the Selection Committee should be encouraged to conduct the evaluation process in the general spirit of a public procurement process.

- **Negotiate Memorandum of Understanding with Selected Vendor(s)**

Tip on Selecting a Vendor for Efficiency Projects

Throughout the RFP and vendor selection process, it is critical to keep in mind your community's goals for a Solar and Efficiency Campaign. If you plan on targeting both residents and businesses on the efficiency side, ensure that the vendor you pick has the experience and understanding with the difference in processes and incentives that are offered by the MassSave program for these two audiences.

5. Launch Program and Advertise

Once the award(s) have been made, program coordinators should be ready to issue a press release and begin advertising the program. Consider hosting a kick-off party where residents can meet the selected vendor(s) and sign up for home energy and solar assessments on the spot.

6. **Conduct Outreach, Education and Customer Enrollment**

Effective outreach and education is essential to the success of a community collective purchasing effort and is best done by volunteer partners in addition to municipal employees who can access residents directly through multiple channels. The program coordinators should work with the vendor to develop marketing materials that ensure that each vendor's services is branded consistently with any marketing that the community is already doing around the program. As part of the educational component, program administrators should be sure to emphasize that reductions in energy use are just as, or even more, important as installing distributed renewable generation, such as solar. Ideas for an outreach campaign include:

- **Website** – Centralize program information, upcoming events, and updates, and provide an easy way for customers to sign up for home energy and solar site assessments. A countdown clock until the final date of the program and/or an updating total of customers enrolled in the program may also encourage participation.
- **Social Media** – Create a Facebook profile or page that residents can like and share with their friends, or create a Twitter hashtag and encourage customers to tweet their experience receiving assessments or having work done. This can be a helpful tool in communities with a younger, more transient population that may consume news more regularly from social media platforms than local papers or neighborhood newsletters.
- **Workshops** – Host a series of workshops that range from introductory to more advanced topics. Community partners may be helpful for finding venues that residents feel comfortable visiting (i.e., other than City Hall) and advertising to their constituents.
- **Ambassadors** – Enlist residents who have completed efficiency upgrades or installed solar to be advocates for the program. Have them present at workshops, record testimonial videos and post on social media pages, etc.
- **Presence at community events** – Table at a farmers market, put a float in a parade, or hand out flyers at a fair.
- **Direct mailing** – Mail promotional materials to residents directly or enclose them in homeowners' water bills.

For more detailed information on how to conduct effective outreach, view the [Conduct Community Outreach](#) strategy.

6. **Conduct Assessments and Complete Installations**

This work is the responsibility of the contractor(s), but the program coordinators can decide to what extent they and their volunteers will be involved (e.g., following up with residents to obtain program feedback). If possible, there should be regular feedback between the

contractor(s) and the program coordinators to determine which outreach efforts are effective, track successes, and mitigate challenges.

7. Program Wrap-Up and Evaluation

Once the final date of the program is reached, the program coordinators should hold a wrap-up event to celebrate the success of the program, reflect on what could have been done differently or propose next steps. The contractor(s) could be asked to sponsor this event, and the media should be invited.

8. Program Monitoring

- **Monitor market** – Check in with vendor(s) periodically to monitor demand for efficiency and solar services after the limited-time offer expires.
- **Support continued interest** – Hold a follow-up meeting with key stakeholders to discuss how to support a continued residential program. Determine whether another campaign will be helpful at some point or whether certain services should be provided on an ongoing basis (e.g., a website where residents can sign up for home assessments/solar audits anytime).
- **Assess program** – Survey residents to identify obstacles and opportunities for improvement.

Example Programs

The section below summarizes examples of community collective purchasing programs in places around the country that have proven to be effective at driving adoption of renewable technologies in the residential sector.

Place	Portland	Massachusetts	Vermont	San Diego
Program	Solarize Portland	Solarize Mass	Vermont Solar Communities	Reduce, Then Produce
Lead Implementer	Energy Trust of Oregon/Neighborhood Coalitions	MassCEC	VPIRG	CA Center for Sustainable Energy
Targeted Technology	Solar PV	Solar PV	Solar PV and hot water	Efficiency upgrades and solar PV
# Campaigns	6	13	10	1
Installations	560	162	60	7 solar, 11 efficiency upgrades
Contractor Selection	Multiple, smaller contractors	One contractor selected per community	One contractor selected overall	Two solar contractors, 30 efficiency contractors invited
Unique Attributes	“Buy local” manufacturer option	Tiered pricing; state-provided outreach toolkit	Collection of lead generation fee	Requiring home performance assessment prior to solar assessment

References

- “The Solarize Guidebook: A community guide to collective purchasing of residential PV systems.” Northwest Sustainable Energy for Economic Development. (May 2012)
<http://www.nrel.gov/docs/fy12osti/54738.pdf>
- “Solarize Mass Pilot Overview.” Massachusetts Clean Energy Center. (2012)
<http://www.masscec.com/content/solarize-massachusetts-pilot-overview>