

Community Campaigns - Scoping Document

Version 1

Purpose

This scoping document is intended for use by local government officials seeking to earn credit for the Community Campaigns High-Impact 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.

Introduction

Community-scale campaigns can be an effective way to encourage adoption of new, innovative technologies to generate value and savings for consumers while advancing New York's clean energy goals. The goal is for local residents and businesses to gain increased access to clean energy. Community Campaigns are generally short-term efforts that identify potential customers through widespread outreach and education.

What is the focus of your Campaign? (Check all that apply)

Community Solar

The intent of the campaign is to encourage residential and/or commercial customers to participate in the following solar opportunities (Check all that apply):

- Community Solar
- Solar-For-All

Electric Vehicles

The intent is for the local government along with partner organizations and volunteers to initiate and develop partnerships with car dealerships, platform providers, and/or other EV industry partners to offer local residents and businesses a variety of makes and models of electric vehicles. The offer may be promoted through ride and drive events and other outreach efforts.

Clean Heating and Cooling and Energy Efficiency

The intent is for the local government to develop partnerships with NYSERDA-approved Clean Heating and Cooling Community Campaigns if they are available in the area. The local government along with partner organizations and volunteers organize a structured campaign to encourage the adoption of clean heating and cooling technologies (e.g., ground- and air- source heat pump systems and heat pump water heaters) as well as energy efficiency retrofits to homes, businesses, and community institutions.

Demand Response

Demand response is important because the actions of individual customers can be aggregated in ways that deliver significant value to the grid. Local governments are uniquely positioned to help customers benefit directly from this opportunity. The local government should consider developing partnerships with providers of demand response products and services, like smart thermostat deployments, battery energy storage, and peak saver campaigns. The objective is to increase resilience and leverage capacity markets for the benefit of participating customers.

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

What is the name of the campaign?

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?

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 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 vendors 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). 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. Core Team members may not have financial relationships with vendors 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 campaign. Describe the role each organization will play in the 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 campaign.

Include population and number of owner-occupied residences. Include any information that would be relevant to the scheduling of a seasonal campaign. For example, is your community a vacation destination, college town, consisting largely of renters, etc?

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

Describe your community's participation in Clean Energy Communities and Climate Smart Communities. Has your community been in contact with a former Solarize campaign? Do you have plans to coordinate with another campaign?

Part 4: Campaign Goals, Vendor Selection, and Preliminary Marketing and Outreach Plan.

If applicable, describe how vendors have been selected to participate in the campaign. If applicable, please submit your Campaign’s Vendor Request for Proposal (RFP) for NYSERDA Review and Approval.

Campaign Goals

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

Number of Subscriptions/ Installations/Purchases:	
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Other goals:

Campaign Milestones

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

RFP Released, if applicable	Date: _____
RFP Questions Due, if applicable	Date: _____
RFP Question Responses Released, if applicable	Date: _____
RFP: Proposals Due, if applicable	Date: _____
Interviews, if applicable	Date: _____
Installer(s)/Vendors selected	Date: _____
Launch Event	Date: _____
Public Outreach & Education Events	Date: _____ Date: _____
Participant Sign-Up Deadline	Date: _____
Participant Contracting Deadline	Date: _____
Installations	Date: _____

Marketing and outreach plan

Provide a detailed marketing and outreach plan for your 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.

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

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?
<i>Town Website</i>		<i>Webpage</i>	<i>Stan Johnson</i>	<i>X</i>

Social Media

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

Site	Dates	Who/What Posted	Completed?
Campaign Facebook page		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?

Tabling

Identify opportunities to use tabling to spread the word about your campaign or events.

What	Where	When	Who is Responsible?

Estimated Budget for Campaign Marketing and Outreach

Expense	Estimated Cost \$

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