**NYSERDA Clean Energy Communities Program**

**Community Campaigns - Scoping Document**

**Version 6**

**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 support a successful 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 subscribe to community solar opportunities.

* **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**

The intent is for the local government to develop partnerships with NYSERDA-approved contractors. The local government along with the regional Clean Energy Hubs, 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).

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

**What is the name of the campaign?**

**Please describe the campaign. What are the goals and objectives? How will these goals and objectives be achieved?**

**Does the campaign include a focus on Disadvantaged Communities? If so, please describe.**

**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:

* Municipality
* Non-Profit
* Private Company
* Other

If other, please explain:

**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.*

Please identify Core Team members in the following format:

Name:

Title:

Organization:

Role in 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.*

*If a partner is responsible for any aspect of the campaign’s implementation, they must be listed here.*

**Part 3: Campaign Goals, Vendor Selection, and Preliminary Marketing and Outreach Plan.**

**What is the name of the vendor(s)/partner(s) that is providing the clean energy product or service?**

**Describe how vendor(s)/partner(s) was selected.**

**Campaign Goals**

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

|  |  |
| --- | --- |
| Number of Installations/Purchases/Subscriptions: |  |

Other goals:

**Describe the campaign’s approach to tracking participation. How will tracking be accomplished? Who will be responsible for tracking participation? How will that information be communicated to the municipality so they can complete the Customer List?**

**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.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Event and Venue (List events)** | **Date/Time** | **Expected Result (number of attendees)** | **Notes** | **Assign roles** |
| *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* |
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**Events – Commercial**

*Consider Lunch & Learns at employers, Green Building Associations or business energy events, Technology councils or Chamber of Businesses and list campaign events.*

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| **Event and Venue (List events)** | **Date/Time** | **Expected Result (# of attendees)** | **Notes** | **Assign roles** |
| *Lunch & Learn; FedEx office* | *8/31/15; 2:00pm* | *15* |  | *Nancy – print brochures; Bill – confirm with installer* |
| *Chamber of Commerce* | *10/15/15* |  |  |  |
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**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.*

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| --- | --- | --- | --- | --- |
| **Name** | **Date** | **Item** | **Who/Contact Info** | **Social Media Addresses** |
| *Sierra Club* | *Throughout campaign* | *Email database and social media* | *Ben Smith;* [*bsmith@google.com*](mailto:bsmith@google.com) | *www.facebook.com/sierraclubny* |
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**E-Newsletters**

*Consider spreading your message through a municipal email newsletter or through email newsletters of a partner organization, homeowner associations, etc.*

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| **Name** | **Date** | **Item** | **Who** |
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**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.*

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| **Outlet** | **Date** | **Story** | **Who** |
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**Websites**

*Identify websites that will host information about your campaign or events.*

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| --- | --- | --- | --- |
| **Name** | **Date** | **Item** | **Who** |
| *Town Website* |  | *Webpage* | *Stan Johnson* |
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**Social Media**

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

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| --- | --- | --- | --- |
| **Site** | **Dates** | **Who/What Posted** | **Completed?** |
| *Campaign Facebook page* |  | *Betty/launch event* | *X* |
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**Flyers/Banners/Mailings**

*Identify opportunities to use Flyers/Banners/Mailings to spread the word about your campaign or events.*

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

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

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| --- | --- | --- | --- |
| **What** | **Where** | **When** | **Who is Responsible?** |
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**Estimated Budget for Campaign Marketing and Outreach**

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| --- | --- |
| **Expense** | **Estimated Cost $** |
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If you have any questions or require additional information, please send an email to [cec@nyserda.ny.gov](mailto:cec@nyserda.ny.gov) and someone will get back to you.