

MARKETING AND IMPLEMENTATION PLAN

Inclusive Community Solar Adder Round 2



NYSERDA

Contractors must use this form to provide additional information when submitting an application for the Inclusive Community Solar Adder (ICSA). Contractors will also be required to submit back-up documentation as part of this form.

NY-Sun Application #: _____ **ICSA Application #:** _____

TEAM EXPERIENCE

Describe how the project team has the experience and capability to meet the required Eligible Subscriber Target. This answer should demonstrate that the Contractor, or Customer Acquisition and Customer Management Provider(s) to be used, has the appropriate experience and capability to fulfill the requirements of the ICSA.

1. What are the roles, responsibilities, and functions of each party described in the Project Contacts (Step 2 of 6) section of the application?

2. Describe the project team’s experience marketing, selling, and managing community solar subscriptions, including:

- a. The amount (total capacity and number of projects) of community distributed generation (CDG) projects the Primary Contractor has developed.
- b. The amount (total capacity and number of projects) of CDG projects the Primary Contractor has developed in New York State.
- c. The areas of New York State the Primary Contractor has worked in.
- d. The amount (total capacity and number of projects) of CDG projects the Acquisition Provider has subscribed.
- e. The amount (total capacity and number of projects) of CDG projects the Acquisition Provider has subscribed in New York State.
- f. The areas of New York State the Acquisition Provider has worked in.

3. Describe what specific experience the project team has in marketing to, selling to, and managing the subscriptions of low-to-moderate income (LMI) households, affordable housing providers, and public/non-profit entities located in disadvantaged communities (DACs) (i.e. subscribers for the ICOSA), including:

For the Primary Contractor

- a. How many projects has the Primary Contractor managed with LMI capacity? What is the Megawatt (MW) total?
- b. How many of the Primary Contractor's customers are LMI? What is the percentage relative to the entire customer base?
- c. How many of the Primary Contractor's LMI customers are in New York State?
- d. When did the Primary Contractor start serving LMI customers?
- e. Where are the Primary Contractor's customers located? Where are the New York State customers located?

For the CDG Acquisition Provider

- a. How many projects has the CDG Acquisition Provider managed with LMI capacity? What is the MW total?
- b. How many of the CDG Acquisition Provider's customers are LMI? What is the percentage relative to the entire customer base?
- c. How many of the CDG Acquisition Provider's LMI customers are in New York State?
- d. When did the CDG Acquisition Provider start serving LMI customers?
- e. Where are the CDG Acquisition Provider's customers located? Where are the New York State customers located?

MARKETING AND SALES STRATEGY

1. Eligible Subscriber Strategy: Describe the marketing and sales strategy that will be used to target the eligible residential and non-residential subscribers. The answer should demonstrate that the Contractor and their project team has the ability to achieve the targeted percentage of eligible subscribers identified in the project's ICSA application. The strategy should identify:

- a. If alternative options, like utility bill payment history, are being used to qualify ICSA subscribers. The strategy is not allowed to require minimum FICO scores for the portion of the project that qualifies for the ICSA.
- b. Targeted geographic locations (towns/neighborhoods and/or zip codes). Specify whether these locations are within designated DACs.
- c. Targeted specific residential customer segments within the geographic locations.
- d. Planned engagement tactics for each specific customer segment.
- e. The Marketing Mix (social, physical advertising, branded content, etc.) used to reach the target audience.
- f. A clear articulation of the plan's long-term goal, with short-term benchmarks that act as markers of interim success.
- g. If channel partners are being utilized, how those partnerships will be part of the Marketing and Sales Strategy.

2. Categorical Eligibility: Describe what documentation will be collected to confirm subscriber eligibility. What methods will be used to collect the documentation? How will the documentation be stored?

3. Geo-eligibility: Describe how you will reach and sign-up customers in the [DACs](#) and [EmPower New York](#) pre-screened areas using geo-eligibility.

4. Affordable Housing Participation: Describe how you will partner with affordable housing properties and sign up their residents to the community solar project. The description should detail if the property:

- a. Meets the eligibility requirements of the NY-Sun Multifamily Affordable Housing Adder,
- b. Residence is limited to LMI households (80% of Area Median Income or below), and
- c. Participation in CDG will not result in increased costs (e.g., rent or common charge increase) for the residential subscriber due to the utility allowance mechanism or other policies or practices.

5. If an affordable housing property is master-metered, specify how the required 10% savings, or its equivalent, will be provided to building residents who are considered eligible residential subscribers.

6. Detail if you have existing relationships with affordable housing properties and what experience you have working with them and signing them up for community solar.

7. **Individual Household Eligibility:** Describe how you will collect and store documented household income information.

8. **Small nonprofits or public facilities in DACs:** Describe how you will sign up small nonprofit and public facilities that are located within and serve a designated DAC. Detail if you have existing relationships with small nonprofit and public facilities in DACs and signing them up for community solar.

9. **Public Schools:** Describe how you will sign up existing public-school buildings across New York State that are designated eligible for PON 4924: [P-12 Schools – Clean Green Schools Initiative](#). Detail if you have existing relationships with public schools that are qualified under PON 4924 and your experience signing them up for community solar.

CUSTOMER ENGAGEMENT AND MANAGEMENT

1. Outline your customer service operations and processes. In your response, be sure to address the following items:

- a. The different ways a customer can sign up for the project.
- b. How a potential or current customer can contact you if they have questions, including the available ways (phone, email, chat, etc.) and hours of operation. Indicate if there is a different process for potential versus current customers.
- c. How you would answer the following questions from a potential customer:
 - i. They do not understand community solar and are worried about the negative personal impacts of signing up.
 - ii. They are receiving assistance on their electric bill (HEAP, utility program, etc.) and are concerned about how the credits will interact.

2. When a customer signs up for community solar, how are they authorizing their participation in the project? Are they signing a subscriber agreement and is that signature stored anywhere?

3. When a complaint comes in, what is your process for how it is handled?

4. Detail the specific protocol if a customer is having the following issues:

- a. Issues with the subscription or amount of credits listed on their bill.
- b. Issues with how their utility and/or Energy Service Company (ESCO) is handling their credits.
- c. They missed their subscription fee payments.

5. Detail how the project team will engage with and support customers with accessibility considerations, including:

- a. Limited English Proficiency.
- b. Limited access to internet, computer/mobile technologies, or landline technologies.
- c. Visual, motor, auditory, speech, sensory or cognitive disabilities.

DOOR-TO-DOOR SALES

Answer the following questions if the project will use door-to-door sales to sign up customers.

1. Which entities will be conducting the door-to-door sales for the project?

2. Walk through the process of how the Primary Contractor, Customer Acquisition Provider, and/or subcontractor(s) interacts with a customer during the door-to-door sales process.

3. When a customer signs up for community solar via door-to-door, how is that verified?

- a. Is there a Quality Assurance (QA) call? Are these calls recorded? Where is it stored and for how long?
- b. If a customer wants to verify they signed up for community solar, how can they get access to that recording?