

Solarize Campaign Scoping Document

Version 1

This scoping document is intended for use by local government officials seeking to earn credit for the Solarize 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.

Solarize campaigns are locally-organized community outreach efforts designed to significantly increase residential and commercial solar installations in selected communities through market aggregation campaigns with competitively selected solar installers. These are short term (approximately 6-9 months, including planning and outreach) local efforts to bring together groups of potential solar customers through widespread outreach and education, and help these customers choose a solar installation company that is offering competitive, transparent pricing.

It is not necessary to complete this document if you can demonstrate direct municipal participation in current or previous rounds of NYSERDA Community Solar NY.

Instructions:

The first step to earn credit for this action under NYSERDA's Clean Energy Communities Program is to send an email to cec@nyserderda.ny.gov to work with a Clean Energy Coordinator to ensure all NYSERDA requirements are met including those outlined in the Solarize Scoping Document Terms and Conditions.

As an orientation, please review materials on the [Community Solar NY webpage](#). Please also watch the video [Creating and Implementing Your Solarize Campaign](#). In addition, all applicants must attend a [PV Trainers Network \(PVTN\)](#) workshop prior to submitting the Solarize Campaign Scoping Document and provide that date, location, and the participants that represented your campaign in Part 1 of this document.

Next, please complete this Solarize Campaign Scoping Document and submit it for review to cec@nyserderda.ny.gov. The applicant is required to sign off on the Terms and Conditions at the bottom of this document to earn credit for this action.

Finally, to earn credit for the Solarize action, at least ten (10) solar customers must already have resulted from the Solarize campaign within your jurisdiction. A list of these should be submitted separately including, but not limited to, the location, installer, date contract was signed, type of financing, and date contract was canceled if applicable.

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

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

What is the name of the Solarize campaign ("Solarize XYZ" or other name)?

Western New York Sustainable Business Roundtable Solarize 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? Is your campaign focusing efforts on either commercial and industrial or low and moderate income customers? Also mention if your community is interested in participating in shared solar.

This campaign will focus on the employees of the participating WNY Sustainable Business Roundtable in Erie and Niagara Counties. (See description of this community below). Participating businesses may also inquire about having solar installed on their facilities as part of this campaign, but will be mainly employee focused.

What training session did a representative of your campaign attend?

Provide the date and location of the PVTN session that your campaign attended, as well as the names of the participants that represented your campaign.

On November 5, 2015, Bonnie Lawrence attended *Creating and Implementing Your Solarize Campaign - Western NY* at Buffalo Manufacturing Works - 847 Main Street - Buffalo, NY 14203.

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 Solarize 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 solar companies that may apply to participate in the campaign. The project manager should expect to make a significant time commitment to the campaign.

First Name: Bonnie

Last Name: Lawrence

Email: bonnie.lawrence@erie.gov

Phone Number: 716.858.8560

Title/Position: Deputy Commissioner Erie County Department of Environment and Planning / WNYSBR Board of Directors

Who is the lead organization?

The lead organization must be a local government, school district, or nonprofit organization (Partnerships are strongly encouraged—see Part 2). The lead organization is responsible for coordinating with NYSERDA and among the other partners.

Name of Lead Organization: Western New York Sustainable Business Roundtable

Mailing Address: c/o Erie County DEP, 95 Franklin Street, Room 1077, Buffalo, NY 14202

The Lead Organization is a: Not-for-Profit

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. The roles are described in the Community Solar NY Guidebook. Core Team members may not have financial relationships with solar companies that may apply to participate in the campaign. Core Team members should expect to make a significant time commitment to the campaign.

- Bonnie Lawrence, Erie County Department of Environment and Planning and WNYSBR Board Member – *project management*
- Mark Shriver, President WNYSBR and Curbell Inc. – *outreach to business members*
- Kathryn O’Donnell, WNYSBR Board Member and Owner of Botanicus – *marketing*
- Dan Healy, WNYSBR Board Member and Plant Manager at Greif Inc. – *educational events*
- Josh Wilson, Erie County Department of Environment and Planning, Coordinator – Pollution Prevention Program (staff to WNYSBR) – *MS Excel, technical support*
- Jason Kulaszewski, UB Regional Institute – *technical support*

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 Solarize campaign. Describe the role each organization will play in the Solarize 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.

While the WNY Sustainable Business Roundtable will be the lead on this solarize campaign, Erie County will play a very significant role. Erie County, as a founding member of the Roundtable, will manage each element of the project, with review and oversight from the Board of Directors of the WNYSBR. Partners on the campaign will include all of the members of the Roundtable, which includes 75 organizations including some of the largest employers in the County – Erie County government, University at Buffalo, National Grid, General Motors, and Rich Products. The member businesses will help to promote the campaign through ‘Lunch and Learns’, as well as their own websites, pay stubs and newsletters.

Member Businesses:

- Advanced Technology Recycling
- Buffalo Zoo
- Cannon Design
- Computer Task Group
- Curbell, Incorporated

- Erie County
- Gin-Sue Enterprises, LLC
- Greif, Inc.
- Harmac Medical Products
- Industrial Support, Inc.
- Lexington Co-Operative Market
- Perry's Ice Cream
- Tapecon, Inc.
- Triad Recycling and Energy/Guard Contracting
- University at Buffalo
- Wendel
- 1088 Delaware Condominiums
- Coca Cola Bottling of Buffalo
- Ecology & Environment
- Environmental Services Group
- McCullagh Coffee
- Modern Corporation
- National Grid
- Rich Products
- Siemens Industry, Inc.
- The Knoer Group
- TM Montante Development/Montante Solar
- Tri-Main Center
- Uniland
- WSP | Parsons Brinckerhoff
- Ambius Buffalo
- Block Club Magazine
- Botanicus, Inc.
- Buffalo Niagara Medical Campus
- Buffalo Energy
- Braymiller Market
- C & S Companies
- CIR Electrical
- Community Beer Works
- Covanta
- DesignSynergies Architecture
- Eaton Office Supply
- ECOsponsible, LLC
- Eco_logic STUDIOS
- Elm Street Bakery
- GM Powertrain
- Greatbatch Medical
- Great Lakes Environmental & Safety Consultants, Inc.
- ITT Enidine
- Lime Energy
- M/E Engineering, P.C.

- Millington Lockwood
- Natale Builders
- Nestle Purina
- Niagara Malt
- Pro Squared Facility Solutions
- Restore/Habitat for Humanity
- Solara Environmental Products & Services
- Solar Liberty
- ServiceMaster Bldg. Maintenance Professionals
- Sweet Home School District
- 1088 Delaware Condominiums
- Watts Architecture & Engineering
- Wilson Greatbatch
- Wireless Control Group
- Xylem

For more information please visit: <http://www.wnysustainablebusiness.org/>

Part 3: Community Profile and Preparation

Describe the community served by the Solarize campaign.

Include population, number of owner-occupied residences, and current number of solar electric and solar thermal installations (see [Open Data NY](#) and [PowerClerk](#) for information). Include any information that would be relevant to the scheduling of a seasonal Solarize campaign. For example, is your community a vacation destination, college town, consisting largely of renters, etc?

There are more than 30,000 residents employed by our 75 members. They live throughout Erie County, as well as other areas of Western New York.

Detail the local policies for solar installations in all the jurisdictions that will be served by the campaign.

Outline the permitting process for solar electric projects in all communities participating in the Solarize Campaign. Have the jurisdictions adopted the NYS Unified Solar Permit? Please note that adopting the Unified Solar Permit is a separate high-impact action under the Clean Energy Communities Program. Municipalities that adopt the Unified Solar Permit are eligible for up to \$5,000, depending on population, through the Streamlined Permitting PV incentive to implement the new procedures. If you are not sure if your jurisdiction has adopted the Unified Solar Permit, please check NYSERDA’s official list of communities at www.nyserderda.ny.gov/CleanEnergyCommunities.

Because this campaign is happening across Erie and Niagara Counties, and each individual community has authority over how they implement solar in their jurisdiction, this campaign will also be used to educate various communities about solar and advantages of adopting a permitting process like the Unified Solar Permit. The following municipalities in Erie and Niagara Counties have adopted the Unified Solar Permit:

- Town of Amherst
- Town of Aurora

- Town of Cheektowaga
- Town of Evans
- Village of Farnham
- Town of Grand Island
- City of Lockport
- City of Tonawanda
- Town of Tonawanda
- Village of Williamsville

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

Describe your community’s participation in Climate Smart Communities, NY-Sun PV Trainers Network, K-Solar, PACE financing, or NY-Prize. Has your community been in contact with a former Solarize campaign? Do you have plans to coordinate with another solarize campaign?

Erie County is a Climate Smart Community and is working towards becoming a Certified Climate Smart Community. The County has been working to promote PACE financing for more than 2 years. Recently PACE was included in the Erie County Executive’s newest economic development plan. Moreover, the Western New York Sustainable Businesses Roundtable is planning a webinar with EnergizeNY for members of the WNY Sustainable Business Roundtable to educate them about the benefits of PACE and planning a strategy to advocate for PACE.

Erie County staff has had discussions with the Solarize Hudson Valley campaign.

Describe the level of community interest in a Solarize campaign.

If you have conducted a survey or other preliminary outreach to gauge community interest, describe the survey, the number of responses, results, and priorities identified.

The WNY Sustainable Business Roundtable has decided to pursue a solarize campaign because it fully supports its mission to foster collaborations that enable our member businesses to act on their sustainability goals, maintain profitability, and promote a healthy community. Furthermore, each member of the Roundtable signs a pledge to create and implement a sustainability plan:

We commit to become a thriving and resilient business by establishing and implementing a Sustainability Plan that:

- *Reduces waste and pollution*
- *Protects our waterways*
- *Optimizes use of energy and materials*
- *Invests in our communities in a transparent and measurable way that collectively, with the efforts of other WNY organizations, reduces the severity of global climate change.*

The Solarize Campaign will help to fulfill that pledge.

The Solarize Campaign was presented to the membership at the WNY Sustainable Business Roundtable annual meeting. There was significant interest in pursuing the campaign from all members.

Part 4: Campaign Goals, Installer RFP, and Preliminary Marketing and Outreach Plan.

Submit Your Campaign’s Installer Request for Proposal (RFP) for NYSERDA Review and Approval.

Please watch the video Selecting a Solar Installer at <https://www.youtube.com/watch?v=0bql-qHXPj8>. The process for selecting a solar installer is also outlined in the Solarize Guidebook. The installer(s) must be pre-qualified by NYSERDA. The applicant must select a pre-qualified solar installer(s) through a competitive process using the program template RFP and guidelines, or one that is reviewed and approved by NYSERDA. Please find the NYSERDA template Installer RFP at the Community Solar NY website at <http://ny-sun.ny.gov/Get-Solar/Community-Solar>.

Campaign Goals

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

Number of Installations:	27
Total of kWh Installed:	135 kWh

Solarize Campaign Milestones

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

RFP for Solarize Installers Released	Date: <u>7/14/17</u>
RFP Questions Due	Date: <u>7/21/17</u>
RFP Question Responses Released	Date: <u>7/28/17</u>
RFP for Solarize Installers: Proposals Due	Date: <u>8/7/17</u>
Interviews with Installers	Date: <u>8/15/17</u>
Installer(s) selected	Date: <u>8/18/17</u>
Solarize Launch Event	Date: <u>8/30/17</u>
Solarize Public Outreach & Education Events	Date: <u>9/15/17</u> Date: <u>9/27/17</u>
Participant Sign-Up Deadline	Date: <u>10/31/17</u>
Participant Contracting Deadline	Date: <u>11/30/17</u>
Solar Installations	Date: <u>Spring/Summer 2018</u>

Marketing and outreach plan

Provide a detailed marketing and outreach plan for your Solarize 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.

It should be noted that because there are other Solarize Initiatives happening concurrently in the WNY Region, the WNYSBR will only solicit participation from the employees/members of the participating WNYSBR businesses, and will count only those participants that sign up through our online platform and Solarize Outreach events hosted by the Roundtable.

Solarize 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
	<i>Launch Event; community library</i>	<i>8/16/15; 7:00pm</i>	<i>75</i>	<i>50 requests for quotes</i>	<i>Nancy – reserve venue; Richard – send out press release; Bill – send email invitation; Betty- print event posters and hand out; Doug – get refreshments</i>
	<i>Apple festival; Smith Orchard</i>	<i>9/15/15; 2:00pm</i>			<i>Betty – bring handouts and sign up sheets; Doug – organize volunteers; Nancy – bring chairs and table</i>
	<i>Launch Event; Downtown Erie County Library</i>	<i>9/15/17</i>		<i>Anticipate 100-200</i>	
	<i>Community Event at UB Solar Strand</i>	<i>9/27/17</i>			
	<i>Lunch and Learns at Various Roundtable Member Businesses</i>	<i>TBD</i>			

Solarize 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/sierrclubny
World Trade Center	Throughout campaign	Email database and social media		
WNY Environmental Alliance	Throughout campaign	Email database and social media		Growwny.org
Curbell Inc.			Mark Shriver	
Daemen College		Monthly Newsletter	Brenda Young	
ISI, Inc.				
Wendel				
Tapecon				

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?
Enviro-News Newsletter				
UB Sustainability				
One Region Forward				

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?
Buffalo Rising				
Business First				
WBFO				
Buffalo News				
Bee Newspapers				
Buffalo Challenger				

Websites

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

Name	Date	Item	Who	Completed?
Solar Installer ABC		Webpage	Stan Johnson	X
WNY SBR				
Erie County				
UB				
GrowWNY.com				
UBRI				
World Trade Center				

Social Media

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

Site	Dates	Who/What Posted	Completed?
Campaign Facebook page	8/12/15	Betty/launch event	X
Twitter – County Executive, WNY SBR, Erie County DEP			
Erie County DEP Facebook Page			
1 Region Forward	As necessary	Jason Kulaszewski	

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?
Libraries – 36 branches			
Rath Building			
UB – both campuses			
Various by Members of WNYSBR – 70+			
Town Halls			

Estimated Budget for Campaign Marketing and Outreach

Expense	Estimated Cost \$
Staff Time – Erie County	\$5,000
Staff Time – Other WNYSBR Members	\$5,000
Printing	\$500

NYSERDA Clean Energy Communities Program

Solarize Campaign Scoping Document

Terms and Conditions

By signing the statement below, you are acknowledging your acceptance and adherence to the NYSERDA Clean Energy Communities Program Solarize Campaign Terms and Conditions:

- The campaign team is committed to and has the ability to conduct community-wide education and outreach around solar energy.
- There is local support and interest in a Solarize campaign.
- The campaign is able to achieve campaign goals for new solar installations in the community and geography served.
- The campaign team is committed to following all program rules and requirements.
- A representative of the campaign team has sent an email to cec@nyserdera.ny.gov to work with a Clean Energy Coordinator to ensure all NYSERDA requirements are met.
- At least one representative of the campaign has attended a [PV Trainers Network \(PVTN\)](#) workshop.
- The solar installer(s) for the Solarize Campaign was selected through a competitive process using the program template RFP and guidelines, or one that was reviewed and approved by NYSERDA.
- The selected solar installer(s) is pre-qualified by NYSERDA.

NYSERDA reserves the right to request the applicant provide clarifying information.

SO AGREED by the chief elected official of the applying jurisdiction, or his/her designee:

Signature:  _____

Print Name: Bonnie Lange Lawrence _____

Title/Position: Deputy Commissioner _____

Date: 7/7/17 _____

Jurisdiction: Erie County _____