

ENERGY EFFICIENCY AND CONSERVATION  
BLOCK GRANT (EECBG) PROGRAM

# Key Activities Summary

## Blueprint 3C: Solarize Campaigns

This Key Activities Summary provides a concise overview of the **Solar + Storage: Solarize Campaigns**. DOE plans to provide technical assistance support to all entities who select this Blueprint, which may include one-on-one attention from DOE or national lab experts, webinars, and peer learning opportunities.



# What

A Solarize Campaign is a local or regional coordinated effort to encourage and support community members, including small businesses and homeowners, to “go solar” by installing a solar PV energy system (most commonly on their home or building’s rooftop). The solar PV system generates carbon-free electricity that the resident or business can use, reducing the amount of grid-supplied electricity they need from their electric utility provider. By participating in a solarize effort, customers receive a group discount and collectively learn how to “go solar” together. The Solarize model tackles three major market barriers: cost, complexity, and customer inertia. Solarize campaigns may be run by local governments or by third party organizations or companies.

## **Case Study: Solarize Philly**

The [Solarize Philly \(PEA\)](#) program incorporated a workforce development program as well as a no-upfront-cost and no-credit-requirement lease option into its campaign to expand access to all income levels.

## **Case Study: Solarize Campaigns Helping Communities of Color**

[Solarize Campaigns Helping Communities of Color \(RMI\)](#) is a summary of the benefits of solar programs and recommendations for expanding access and participation to communities of color and low-to-medium income communities.

Solarize campaigns can focus on bringing solar to low-income homeowners. RFPs for solar installation companies can also include preferences for local and women- and minority-owned small businesses.

# Why

Rooftop solar is an excellent way to lower energy bills, reduce GHGs from the power sector, increase distributed generation to create a more resilient power grid, and empower residents to take control of their energy source. How to “go solar” can be an unfamiliar process, however, and questions about expected costs, reliability and choice of equipment, payback periods, maintenance needs, potential financing, and contractor selection can delay people’s decision to install solar on their home or business. Governments, in cooperation with the private and non-profit sectors, are in an excellent position to motivate and mobilize residents and business owners to go solar. Solarize campaigns often spark a major uptick in solar adoption in communities, well beyond the campaign itself.

**Case Study: [State of Connecticut Solar Campaign Lessons Learned \(Yale Center for Business and the Environment\)](#)** is an analysis of Solarize Campaigns with the finding that targeted messaging matters and an explanation of the analysis results.



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# Key Activities

These selected Key Activities are suggestions of important steps a government could take to begin or make progress on their solarize campaign journey. EECBG Program awardees that utilize a blueprint will receive expedited application review from DOE. Applicants must execute at least one of the key activities listed under each selected blueprint but should avoid going beyond the recommended activities. Going beyond these key activities may trigger additional reviews of your EECBG Program project to ensure you're meeting National Environmental Policy Act (NEPA), historic preservation, and/or other federal regulations. While each step is important, they should be seen as a guide. Awardees should determine their own priority activities based on their local context.

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**Design Solarize Campaign Details**

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**Stakeholder Engagement through Education and Outreach**

3

**Procurement of Solar Installer/Developer, Legal, and Technical Support**

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**Solarize Program Education, Outreach and Advertising**

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# Design Solarize Campaign Details

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Solarize campaigns can take different forms depending on the local community's context and the organizations available and interested in leading a campaign. Fortunately, Solarize is a well-established model and can be easily replicated using the resources listed below to minimize the level of effort required. Many Solarize programs also have websites and can be easily searched for additional examples.

When designing your program, consider who the program partners are, timeline for the campaign, what information or assurances potential participants will want to know, how offers will be procured, financing options for customers, and plans to support outreach and access for low-income customers and environmental justice (EJ) communities.

Explore financing options for customers, such as: solar installer-provided financing, Green Bank loan products, and other local financing institutions (e.g., credit unions).

## Key Resource

### [The Solarize Guidebook: A community guide to collective purchasing of residential PV systems \(DOE\):](#)

This guidebook provides an overview of Solarize campaign program models, case studies, lessons and considerations, and a chapter on planning a Solarize campaign.

## Key Resource

### [Unlocking Solar for Low- and Moderate-Income Residents: A Matrix of Financing Options by Resident, Provider, and Housing Type \(NREL\):](#)

This report identifies the most promising strategies policymakers might consider using to finance PV for LMI customers across three housing types: single-family, multifamily, and manufactured housing.

## Stakeholder Engagement through Education and Outreach

Stakeholder engagement is a core piece of a Solarize campaign and speaks to support of the program and its offerings. A Solarize program having a positive reputation, a clear understanding of what it is offering and how it works, and general support across the community can increase potential customer confidence and interest in participating. Example stakeholders could include representatives of the local economic development office and Chamber of Commerce, environmental and sustainability groups, solar installation companies, local government sustainability or environmental staff, and non-profit groups.

Local community group(s) can also be active program partners. Often, they are environmental or sustainability organizations that are active in the community but can also be organizations that are focused on equitable access to energy saving programs. Their support of a Solarize campaign can perform a vital role of bringing more potential program participants to the table through promotion, information sharing, and being a neutral or trusted voice of knowledge that has reviewed the program details and understands how solar installations work.



### Key Resource

**Solarize Philly (PEA):** This Solarize program incorporated a workforce development program as well as a no-upfront-cost and no-credit-requirement lease option into its campaign to expand access to all income levels.

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## KEY ACTIVITIES

### **Key Resource**

**Resource Guide to Solarize Campaign Success (NY-SUN)**: This guidebook provides recommendations for each step of the Solarize program process, including information to know before the RFP process, RFP templates, and best practices for working with Solarize installers/developers.

# **Procurement of Solar Installer/Developer, Legal, and Technical Support**

The lead organization will be responsible for selecting an appropriate solar installer that will meet the objectives for the Solarize campaign and for conducting outreach and development of locally-focused marketing materials. The solar installer/developer will be responsible for offering discounted contracts for solar systems to participants, installing the solar systems according to the program rules and local building code regulations, and providing ongoing reporting of solar contract status and solar installation progress. This is a critical role, and careful attention must be paid to the criteria for selection and assessment of the partner's readiness and ability to proactively support this program.

As part of selecting a solar installer/developer, make sure that there can be an agreed upon process for ensuring that the project proceeds as intended and at the appropriate cost and quality. Solarize program leads should evaluate prior Solarize programs and speak with knowledgeable peers to understand the methods and processes that are needed to make sure that participants in a Solarize program receive the expected benefits and are treated with respect by the solar developer. Examples of this could include:

- » Criteria that is included in the selection of a solar installation company, such as references and company capacity information,
- » Oversight and mechanisms to track responses to interested customers, contract offer and acceptance status, and project installation progress, and
- » Customer check-ins from the Solarize program lead in addition to customer communication with the solar installation company.

Additionally, the lead organization may need to procure legal support to review contract materials – both when securing a solar installer/developer as a program partner and contracts that will be issued to program participants – and technical support to review products that the solar installation company proposes and/or to help address potential customers' questions.

- » Creation, issuance, and management of the RFP process, contractor selection, and contract/pricing negotiation. Cost estimate from external resources: \$20,000-\$40,000 battery storage typically warrant more procurement and legal support than standalone solar transactions.).

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## KEY ACTIVITIES

# Solarize Program Education, Outreach and Advertising

Education, outreach, advertising, and engagement aims to bring interested residents and businesses to the program and to overcome customer inertia and hesitation by providing information about how solar systems work, the financial benefits, and answering technical and ongoing maintenance questions, such as cleaning and operating needs and warranty options. Activities include general and direct outreach, events, developing educational materials and hosting stakeholder and interested customer meetings.

- » Develop collateral and build website for public education, program promotion, and sign up – Cost estimate: \$3,000-\$10,000
- » Marketing and direct customer acquisition activities. Cost estimate: \$10,000-\$50,000

## Key Resource

[Disadvantaged Communities – Single-Family Solar Homes Program: 2020 Marketing, Education and Outreach Plan \(GRID Alternatives\)](#):

This document describes the marketing and outreach plan for the Single-Family Solar Homes Program, identifying target audiences and approaches.

## Key Resource

[Solarize Philly \(PEA\)](#): This Solarize program incorporated a workforce development program as well as a no-upfront-cost and no-credit-requirement lease option into its campaign to expand access to all income levels.