



2022 Northwest Solar Co-op

March 2022 Updated Scope of Work

Solar United Neighbors, a vendor-neutral 501(c)3 nonprofit organization, is expanding our momentum with the Northwest Colorado Solar Co-op by launching a regional collaboration to serve the residents and small businesses of Routt, Moffat, and Rio Blanco Counties. This effort will ensure we strive to achieve impactful metrics like our first initiative, the Yampa Valley Solar Co-op, while expanding our impact and partnerships with local municipalities and partners including the City of Steamboat Springs, Routt County, the Craig and Meeker Chambers of Commerce, the Yampa Valley Sustainability Council, Western Colorado Alliance, and more. This collaboration will support additional member recruitment, especially in rural areas, with outreach and educational opportunities tied into the solar co-op and dialogue regarding the ongoing energy transition.

About Solar Co-ops

A solar co-op is formed when a group of neighbors enters the process of going solar. Typically, the group selects a single contractor to install systems on all the participating homes. Each participant owns their own system and signs their own contract with the installer. By going solar as a group, each participant saves on the cost of their system and gets support from the group throughout the process. The installer chosen by the group can order equipment in bulk and reduce travel and marketing costs, allowing them to pass significant savings on to the participants.

Solar United Neighbors' approach is different than traditional Solarize programs. We focus on participant engagement as opposed to recruitment. We work very closely with the group, educating each participant about solar. We involve them in community outreach, the installer selection process, and the financing process. This gives people a much greater sense of ownership and increases their knowledge and comfort with the process of going solar. We also try to connect participants to opportunities for advocacy or community service after they go solar and help them become part of local renewable energy groups.

Although this labor-intensive process can lead to a smaller group size (though not always), a much higher percentage of our participants go solar (30%) than Solarize programs typically see (5-10%). Additionally, we continue to engage and support our co-op participants after the co-op is over – they are invited to volunteer, join our free listserv, newsletter, and social media groups, and can become a member. As a result, past co-op participants are highly informed and actively engaged in growing renewable energy in their community.

A typical solar co-op costs \$20,000 or more to implement, providing staff and support from our team of experts. During the implementation of the solar co-op, a group of partners and local volunteers are invited to participate in a steering committee, which helps coordinate outreach strategies and ensures smooth implementation of the program.

2022 Northwest Solar Co-op: Umbrella Solar Co-op Model Pilot

The Solar Co-op model has proven its effectiveness with dozens of communities across Colorado who asked to bring forward a local program for their constituents. To support more effective regionalized engagement, we are piloting a program to support an ‘umbrella model’ to allow for multiple municipal partners to participate in one initiative. In addition to saving resources, the intention of this consolidation is to streamline our internal process and give solar installers the ability to leverage more potential projects for their bids.

A municipality or municipalities who have secured funding for a solar co-op will serve as the region’s anchor. SUN’s priority is to deliver the scope of work for this anchor community and, as resources allow, we can incorporate geographically relevant communities who are provided their own scopes of work. The cost to participate in this model will be determined based on equity considerations, the community’s population, in-kind contributions from the municipality, and other factors.

Given the resources required to facilitate a solar co-op program, we look for a capacity commitment from our partners to ensure success in our community outreach and engagement. These strategies can include collaborating on events, facilitating local partnerships, working with the media, providing mailers to residents, deploying signage at strategic locations (e.g., recreation centers, libraries, parks, etc.), pursuing resources to support energy equity, and other tactics.

Solar Equity Rebate Pilot Program

A solar equity rebate serves as a direct pass-through to support disproportionately impacted households in the co-op service area to help address financial barriers. The eligibility requirements and distribution amount(s) will be determined by municipal partners, with a strong preference for municipalities to facilitate eligibility determinations of co-op members. If the equity rebate program is administered by Solar United Neighbors, a 20% administrative fee will apply to the rebate funding raised. Other Colorado solar rebate pilot programs have supported households that earn 80%-100% or less of area median income, who previously participated in energy equity rebate programs (e.g., audits, equipment upgrades), or live in deed-restricted households.

The Solar Co-op Process and Deliverables

Phase I: Planning and Launch of Education and Outreach to Recruit Participants

The first phase of the solar co-op process is outreach to potential co-op participants with the goal of turning people out to an informational seminar and community meetings. This outreach involves hanging fliers, pitching local media, advertising via neighborhood listservs and emails, Facebook invitations, leaving door hangers, and supporting word-of-mouth networking. To make this effort as successful as possible, we also identify and cultivate local partners early in Phase I. We often partner with local governments, schools, churches, nonprofit organizations, and businesses who support solar power and who have strong connections with the community. Partners help us identify dates and locations for info sessions in the community and help with outreach through their networks.

At info sessions, the Solar United Neighbors of Colorado team will explain how the co-op process works, provide a detailed but consumer-friendly overview of residential solar PV, and answer questions. We cover the technology itself, financing options, policy considerations, the installation process, and other topics such as battery storage or net metering as appropriate for local conditions. We will also provide Spanish-translation services in coordination with the city where needed.

After this initial educational meeting, people who are interested in moving forward with the co-op will sign up on the co-op's webpage. Solar United Neighbors' technical staff then completes an initial screening of each participant's roof (or property) via a combination of Google Earth and Bing Maps. We also work with homeowners to ensure we have the most up-to-date information about their property (e.g., a nearby tree has come down) to make our assessment. We perform this screen for several reasons: it ensures that we do not waste the time of homeowners whose property is not a good fit for solar, it ensures that the installer is able to work as efficiently as possible, and it protects homeowners from unscrupulous solar installers who might be tempted to sell them a system for an unsuitable location. We report the findings of our initial assessment to each homeowner and the installer, once selected.

1. Phase I Deliverables:

- 1.1.** Develop informational materials
 - 1.1.1.** Produce a one-page flyer/information sheet for the Northwest Colorado Solar Co-op
 - 1.1.2.** Produce a door hanger to be distributed by volunteers within the community as needed
 - 1.1.3.** Develop a table estimating installation cost and savings based on local rates and incentives
 - 1.1.4.** Develop answers to Frequently Asked Questions covering policy, regulation, incentives, and financing options available to regional residents.
 - 1.1.5.** Develop a web page for the co-op and an online sign-up portal for participants.
 - 1.1.6.** Develop these materials in Spanish as needed
- 1.2.** Identify, cultivate, and provide ongoing coordination for diverse community partnerships to assist with community outreach about the solar co-op
 - 1.2.1.** Invite key partners and volunteer leaders to participate in an ongoing Steering Committee for the duration of the program
- 1.3.** Coordinate with partner organizations to find dates and locations for 2-3 info sessions.
- 1.4.** Coordinate with partner organizations to set a clear timeline for program implementation.
- 1.5.** Coordinate with partner organizations to conduct outreach to the community, including through press and media, events, social media, email listservs/networks, and word-of-mouth.

Phase II: Selecting an Installer

Once at least 20 participants have signed up and passed the roof screening, we issue a Request for Proposals (RFP) from area solar installers. We will reach out to installers through the Colorado Solar and Storage Association and the national Solar Energy Industry Association. We also have a portal on our website where any installation company can sign up to receive RFP announcements. The RFP will ask installers to provide details of their company, equipment, and installation process. They will be asked to provide a single base price that they will offer to the entire group of co-op participants. and detail the "adders" or "upcharges" participants may choose, e.g. for more complex installations or more expensive equipment.

Once we receive bids from installers, we convene a Selection Committee made up of solar co-op participants interested in choosing an installer for the group. We compile a detailed spreadsheet that summarizes and compares each element of each bids received. This helps non-experts to make an informed choice in what can otherwise be a complicated decision. The Selection Committee reviews the bids and the "bid review spreadsheet" and selects an installer to complete all the projects for the group. Some large co-ops may opt to close and open a second one to select more than one installer. Although Solar United Neighbors facilitates the process and answers technical questions, the Selection Committee itself decides which installer to select.

2. Phase II Deliverables:

- 2.1. Continue community outreach activities and outreach coordination with partner organizations.
- 2.2. Host one or more in-person information webinars to educate the community and co-op participants about going solar and the co-op process. [Launch event]
- 2.3. Recruit at least 30 co-op participants with suitable roofs/properties for solar.
- 2.4. Provide regular updates to participants to keep everyone engaged and to encourage them to recruit friends and neighbors.
- 2.5. Conduct initial satellite roof screenings for all new participants.
- 2.6. Develop a clear, detailed Request for Proposals (RFP) that reflects the needs, values, and preferences of the co-op participants.
- 2.7. Distribute the RFP to area solar installers through our network, the Solar Energy Industry Association network, and other local channels.
- 2.8. Collect and review all RFP responses, including by performing due diligence and checking installer references.
- 2.9. Compile a bid review spreadsheet that summarizes the bids received into an easy-to-understand format for co-op participants.
- 2.10. Convene a Selection Committee and facilitate the bid selection process.

Phase III: Recruiting Additional Participants and Signing Contracts with the Installer

Once an installer has been selected, we continue to recruit co-op participants for at least one month. During that time, the chosen installer also meets with each participant. They provide an individualized proposal that lists the size and cost of a solar system for each house, with the cost reflecting the pricing put forward in their bid. If participants decide to move forward with the project, they sign an individual contract with the installer to have the system installed.

Solar United Neighbors also helps co-op participants identify and access incentives and financing programs. Our staff is well-versed in incentives and financing options for residential solar, including rebates and tax credits, loans that can be used for solar installations, third-party ownership models (where available), and property assessed clean energy programs (where available). Some of these financing options eliminate the upfront cost of a solar installation, broadening access to working and middle-class families.

In addition to providing direct support to co-op participants, we exhaustively track the installation process and remain engaged in troubleshooting and education throughout the process. Issues arise almost daily related to miscommunication with installers, equipment, permits, interconnection, scheduling, roofing impacts, contracts, insurance, renewable energy credits, and financing.

We collaborate with installers using Salesforce CRM, which allows us to efficiently coordinate visits and track the progress of installations performed for the co-op. We help installers streamline and digitize scheduling, contract signing, and customer relationship management processes—drastically increasing installer’s capacity. This allows the Selection Committee to pick the best installer for the job, regardless of their size.

3. Phase III Deliverables:

- 3.1. Continue community outreach activities and outreach coordination with partner organizations, ensuring we maximize interest before the sign-up deadline.
- 3.2. **Recruit 100 solar co-op participants across the counties of Routt, Moffat, and Rio Blanco**
- 3.3. Host one or more information session webinars to educate the community and co-op participants about going solar and the co-op process.

- 3.4. Continue to provide regular updates to participants.
- 3.5. Continue to provide satellite roof screenings for new participants.
- 3.6. Facilitate weekly calls with installers to get progress updates, discuss problems or concerns, and identify common participant questions to address in our weekly email update.
- 3.7. Support people from proposal to signed contract by following up regularly, answering questions, and trouble-shooting.
- 3.8. Reach out to participants who have not scheduled site visits.

Phase IV: Post Installation Follow Up

Once the system is installed, we continue to engage with participants. We bring them into our existing state networks and connect them to ongoing policy advocacy efforts, including legislation and regulatory cases.

4. Phase IV Deliverables:

- 4.1. Assist at least 25 solar co-op participants through the contracting process
- 4.2. Troubleshoot any issues that arise post-installation with participants, especially interconnection and billing issues.
- 4.3. Conduct spot inspections on a few installations to support quality control.
- 4.4. Coordinate with partner organizations to host a party to celebrate the community’s new solar installations. Invite all co-op participants, the installer’s team, and local media.
- 4.5. Connect participants with other local partners and a growing network of solar supporters.

Program Budget

2022 Northwest Solar Co-op	
Routt County (2022 Budget)	\$10,000
City of Steamboat Springs (2022 budget)	\$5,000
<u>City of Steamboat Springs (2021 budget carryover)</u>	<u>\$5,000</u>
	\$20,000
Solar Equity Rebate Pilot Program	
<u>TBD</u>	<u>\$5,000</u>
	\$5,000
	Program Total: \$25,000