

Oregon Community Solar Program Marketing and Outreach Guidelines for Project Managers



Project managers are central to the Oregon Community Solar Program. They develop, build and operate community solar projects. They also enroll customers in projects and manage customer subscriptions. These guidelines summarize several of the key program rules related to outreach and marketing by project managers. Note that violations of these guidelines may lead to disciplinary action under the program.

WHEN IS MARKETING AND OUTREACH PERMITTED?

The types of marketing and outreach that a project manager or prospective project manager may conduct regarding the Community Solar Program depends on the status of the project manager and their projects within the program.

The two key thresholds that determine what activities a project manager may engage in are **Project Manager Registration** and **Project Pre-Certification**. *(These steps are fully described in the Program Implementation Manual available at www.oregoncsp.org).*

Status	Permissible Activities
Prior to Project Manager Registration	<p>No marketing and outreach activities are permitted prior to project manager registration.</p> <p>Companies and individuals that have not registered as project managers may not portray themselves as associated with, participating in, or developing a project through the Oregon Community Solar Program. They may also not collect any customer information or develop customer contact lists associated with the program.</p>
After Project Manager Registration	<p>After registration and prior to project pre-certification, project managers may begin general marketing regarding their involvement in the program and intent to develop community solar projects. They may utilize approved logos other marketing collateral described in the program’s brand guidelines.</p> <p>Marketing that refers to a specific community solar project must include clear disclosure that the project is proposed and subject to Oregon Public Utility Commission (OPUC) approval.</p> <p>Registered project managers may develop contact lists of customers interested in participating in a project that the project manager intends to develop. They may not, however, sign participation contracts with customers or collect any payments.</p>
After Project Pre-Certification	<p>After receiving project pre-certification, a project manager may conduct marketing related to their project and may also sign contracts with participating customers. If approved by the Program Administrator, they may also collect upfront participation payments.</p> <p>In all cases, the project manager must still abide by the code of conduct detailed in the Program Implementation Manual.</p>

MARKETING AND OUTREACH DO'S AND DON'T'S

Make Clear and Evidence-Supported Marketing Claims

All marketing claims must be **clear and factual**, and all financial terms must be **easily understood and transparent**.

Do	Don't
<p>Include the below approved program marketing disclaimer in all materials.</p> <p>"The Oregon Community Solar Program is a state-enabled initiative overseen by the Oregon Public Utility Commission and implemented by Energy Solutions, the Energy Trust of Oregon, and Community Energy Project. The Program provides resources and certification for its Project Managers (PMs) but is not affiliated with or sponsors of PM organizations.."</p> <p>Prior to pre-certification, represent all projects as pending OPUC approval in all materials.</p> <p>"This project is pending pre-certification from the Oregon Public Utility Commission and does not have approval to begin development or to accept customer subscriptions."</p> <p>Clearly disclose all pricing and payment options and terms, including any financing offers, as well as future price changes or escalators and the availability period for any special offers.</p> <p>"Special offer through 3/1/2020 only! Sign up for community solar for \$0.09/kWh* *Application fee of \$100 applies, price will escalate by 1.5% annually"</p> <p>Provide objective evidence in support of all claims and provide assumptions regarding bill savings.</p> <p>"Subscribe for less than \$50/month* *Based on subscription of 500 kWh/month"</p> <p>"Save more than \$1,000 over the life of your contract!*" * Assuming a 3- kW subscription over 10 years"</p>	<p>Refer to any subscription product where the participant provides any sort of payment to the project manager as "free."</p> <p>"Sign up today to receive free solar!"</p> <p>Make any promises or guarantees regarding performance or savings that are not included in customer contracts.</p> <p>"Guaranteed to cut your energy bill in half!"</p> <p>Promote a project prior to project manager registration.</p> <p>"We're bringing community solar to your neighborhood, pre-enroll here!"</p> <p>Promote a project prior to pre-certification without stating that it is pending OPUC approval.</p> <p>"We're building a community solar project at Miller's Farm!"</p>

Abide by Program Rules Related to Marketing Materials

All program marketing materials must:

- Include program-approved marketing disclaimers
- Follow program guidelines for logo use and branding

Project Managers are bound by additional rules and regulations regarding customer outreach and engagement, such as abiding by all Federal, state, and local laws, including telemarketing and door-to-door marketing rules. These are detailed in the program code of conduct, which is available at the Community Solar Program website at www.oregoncsp.org along with program branding guidelines and other project manager resources.

Additionally, project managers should review the Federal Trade Commission's guidance on rights and responsibilities related to advertising and marketing at <https://www.ftc.gov/tips-advice/business-center>