



OREGON
COMMUNITY SOLAR
PROGRAM

Project Manager Workshop: Low-Income Subscribers





In Today's Workshop

Presentation: Working together to recruit LI participants

- Role of the LIF
- How the LIF supports PM's
- How PM's can help the LIF
- High level LI subscriber enrollment process

Facilitated Discussion, Best Practices

- Collaborative Marketing
- Waitlist management
- LI Housing – with guests?

The background of the slide is a photograph of a forest. The upper portion shows tall, thin trees with sunlight filtering through the canopy, creating a hazy, golden light. The lower portion shows a dirt path winding through dense green undergrowth. A solid green vertical bar is on the left side, and a solid orange horizontal bar is positioned below the text box.

Introductions

Roles and expectations of the Program
Administration team and Project Managers


Who is here?

Introduce yourself

- Your name
- Your organization
- One way you've tried to stay sane in quarantine



Low-Income Facilitator (LIF) Role

	
Recruitment	<ul style="list-style-type: none">• Low-income subscriber recruitment• Marketing plan support• Community education• Additional equity goals
Verification	<ul style="list-style-type: none">• Household income & size• Confirmation of utility• Consent documentation• Waitlist management• Previous energy use• Demographic information

Project Manager Roles

Recruitment	<ul style="list-style-type: none">• Low-income subscriber recruitment• Community education• Size subscriptions (may ask for recommendations)• Get accurate information to LIF
Subscriber Management	<ul style="list-style-type: none">• Final follow-up / contract signing• Waitlist management• Turnover• Ongoing<ul style="list-style-type: none">• Sizing adjustments for customer• Relocating in/out of territory• Customer service

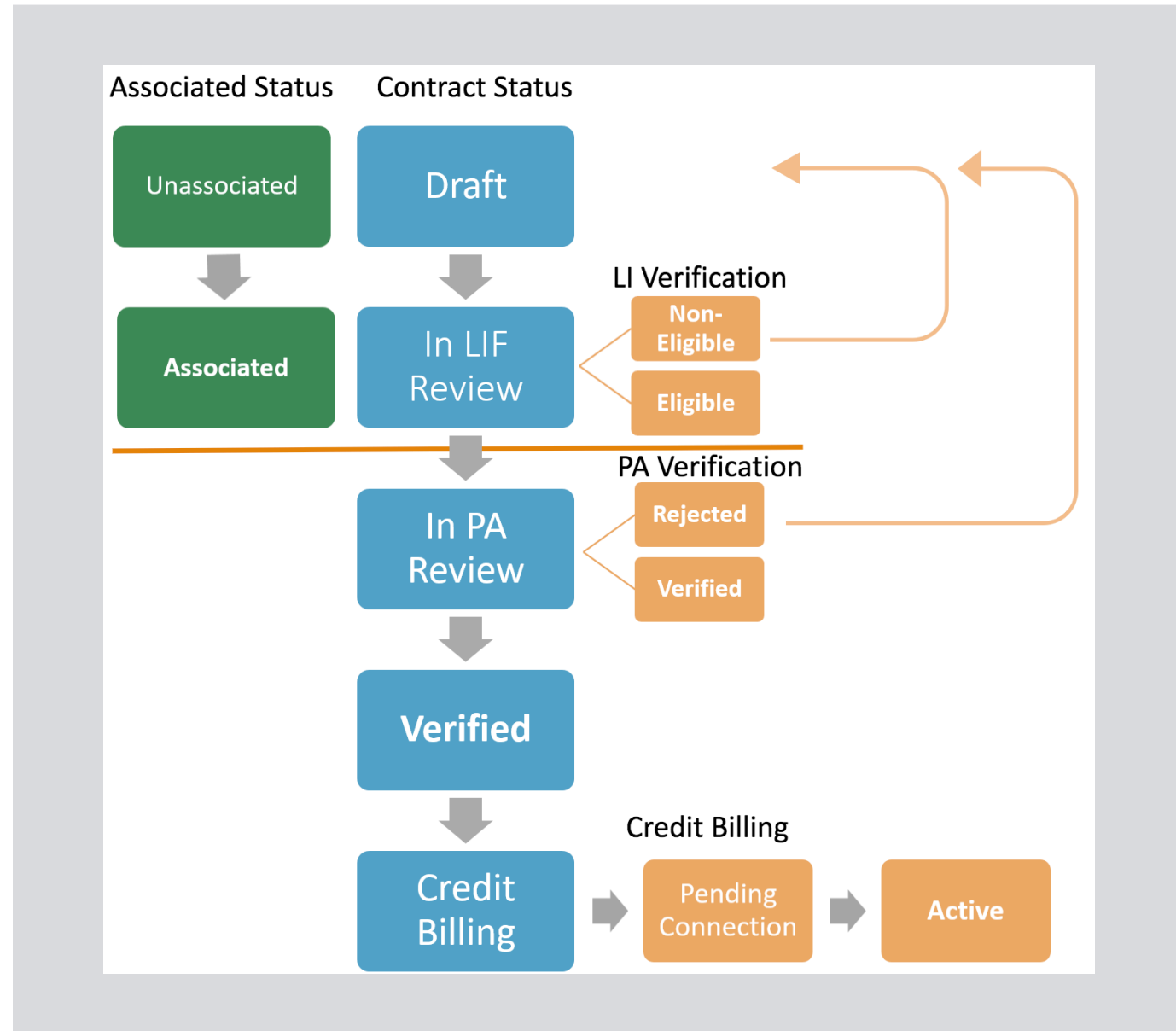




Enrollment Process

High level overview of enrollment process

Enrollment Flow



Recruitment Flow

If Project Manager recruits:



PM fills out participant profile and includes:

- Contact information
- Project & Subscription size
- Utility Account Data



CEP confirms low-income eligibility through intake



PM finalizes contract with subscriber and submits information through platform



PA verifies contract and enrolls subscriber in project

Recruitment Flow

If CEP recruits:



- CEP does complete intake and puts subscriber on statewide waitlist
- PA recommends subscription size



- CEP assigns subscriber to a project
- Considers benefits/safety



- PM finalizes contract with subscriber and submits information through platform



- PA verifies contract and enrolls subscriber in project

Understanding your process



Poll Time!

- What are you using to manage participants?

What to expect:

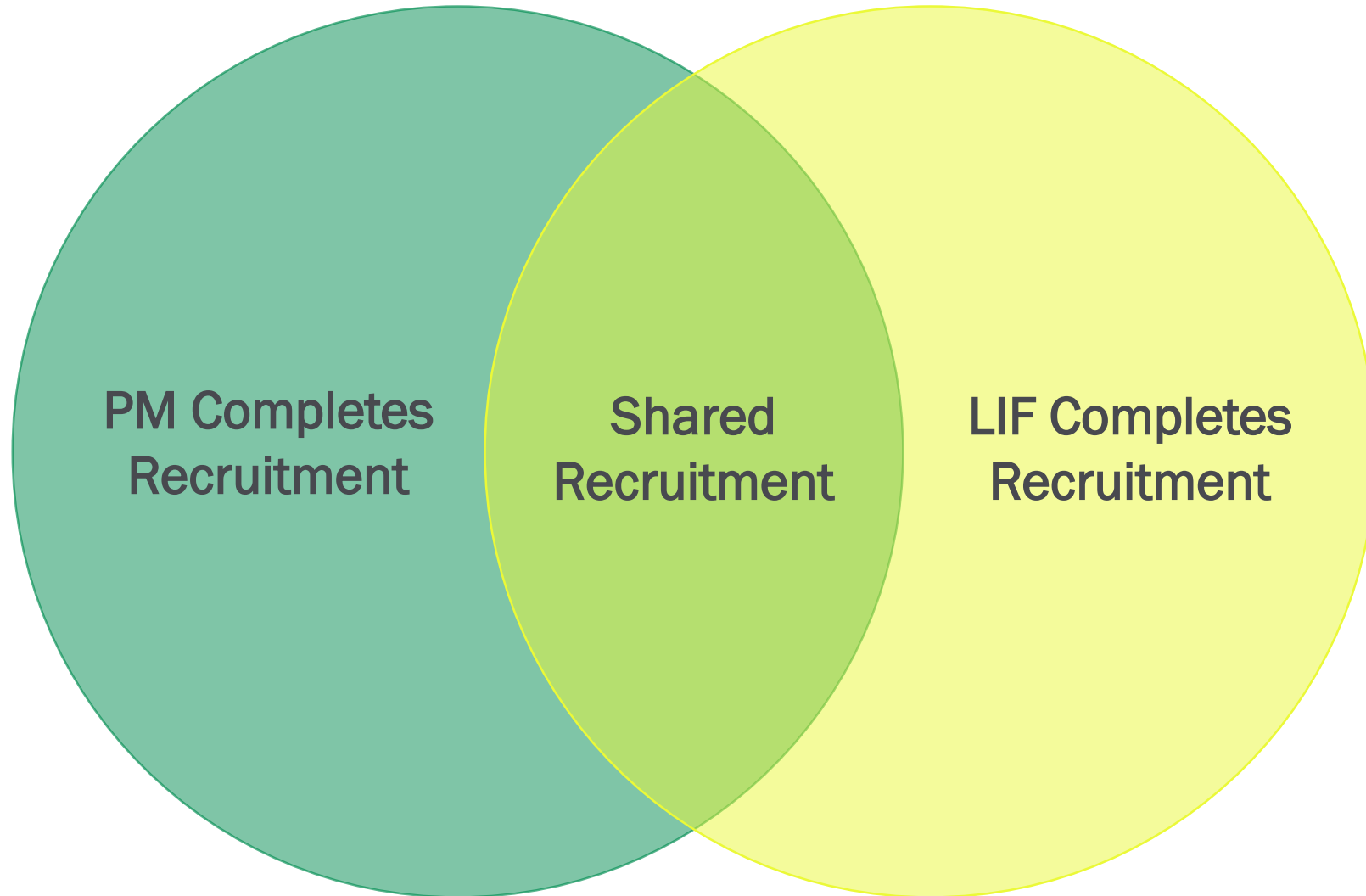
- PM Workshop dedicated to entire platform enrollment experience
- Timeline: Overview provided in June
- Resources coming soon: Participant Enrollment Guidance document

A photograph of a forest with tall, thin trees and sunlight filtering through the canopy. A white rectangular box is overlaid on the right side of the image, containing the title and subtitle. The box is bordered by a green bar at the top and a blue bar at the bottom.

Recruitment

How CEP and Project Managers can support each other for successful outcomes.

Level of Recruitment Support



PM Recruits Participants

PM shared their marketing plans

- Why?
- How Many?
- Target Communities
- Outreach Tactics
- Working with CBO's
- Timeline
- Turnover Management



Why Recruit Folks Yourself?

- Choose your community
- Assure full assignment to your project
- Gain connection with new markets
- Work with great partners!
- Support overall program goals



Shared Recruitment

- Project Manager and LIF each recruits part of the low-income participants
- Create a joint recruitment plan
- **Facilitated discussion**
 - Collaborative outreach
 - Waitlist management



When LIF Recruits

- Assembles a statewide waitlist of verified participants, assigned in order they're added.
- LIF pairs project and participant



Intake

1. CEP reaches out to participants added to the platform
2. Have verification make appointment through the website
3. CEP calls at appointed time
 - a) Non-English language options available



Low Income Verification

Expedite Verification by:

- Uploading participants in batches sooner than one big list at end
 - Providing participant emails (not only phone)
- Increased education of participants reduces intake times
- Working with an org that already does income verification? Let's talk!





Resources

Low income considerations, marketing best practices,
available resources

Low-Income Considerations

- No up-front or termination fees
- Subscription fees may not exceed the credits in any given month (even when oversubscribed)
- Minimum 20% subscription discount



Marketing Best Practices

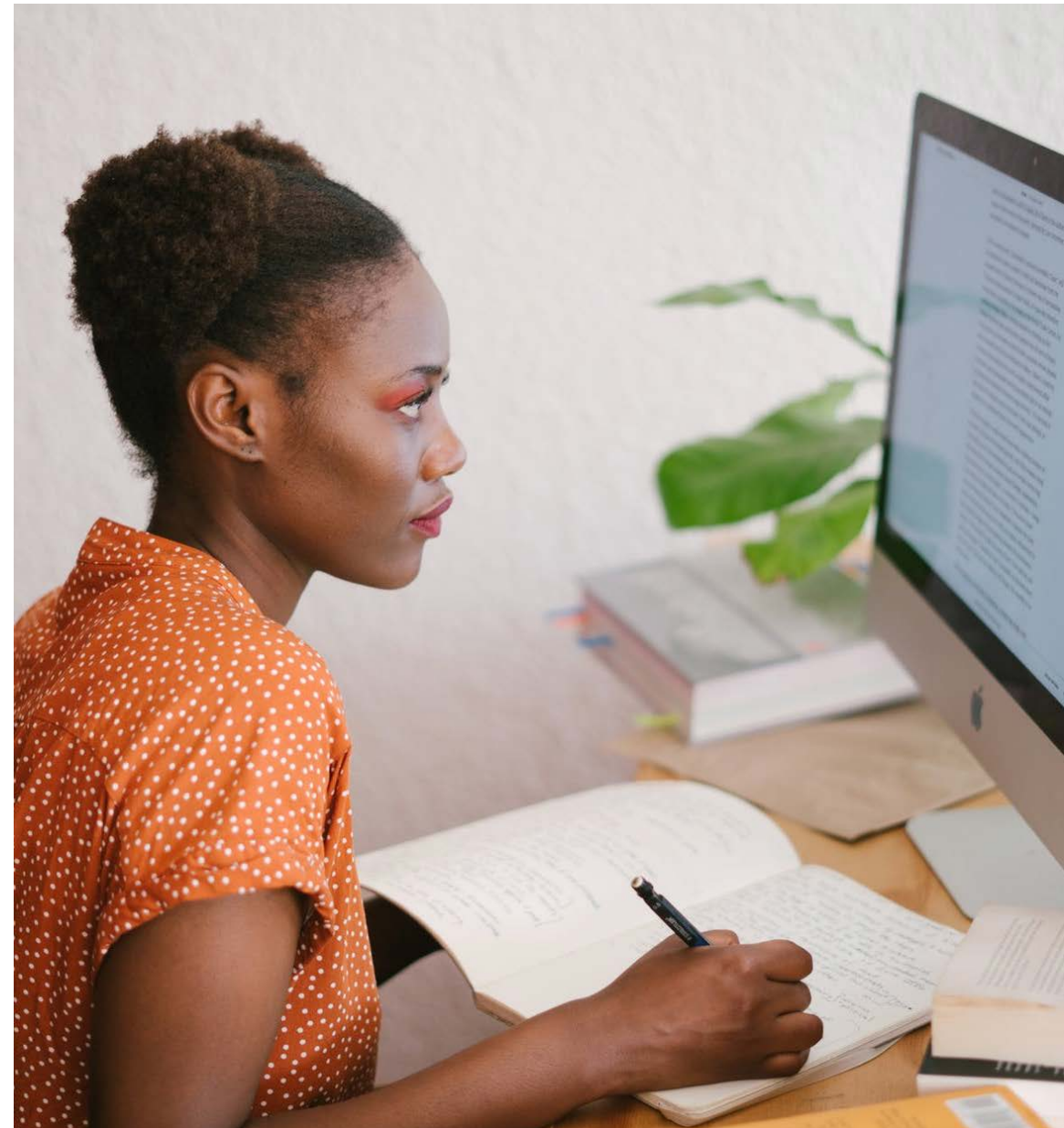
- Project managers are subject to specific guidelines when recruiting.
- Make sure to familiarize yourself with all of the following resources which cover:
 - How to use the ORCSP logo
 - Specific language used to advertise project
 - Co-Branding Guidelines
 - More!
- Visit www.oregoncsp.org/p/ProjectManagerResources/



Educational Resources

- Frequent livestream workshops
 - We can bring a workshop to your partners
- Brochure, website, additional documents for questions
- Coming Soon: Educational videos in multiple languages
- Coming Soon: Media packet about low income

What else can help you?



Subscription Sizing

- Estimated Size (kW-DC) based on past use, we recommend sizing at **80%**.
- Without past use history, will recommend subscriptions at **50%** estimated capacity
- PMs can size subscriptions if they recruit subscribers, or they may ask LIF to make a recommendation.
- Oversubscription *cannot cause LI subscriber bills to increase.*



Questions Before Facilitated Discussion?





Facilitated Discussion

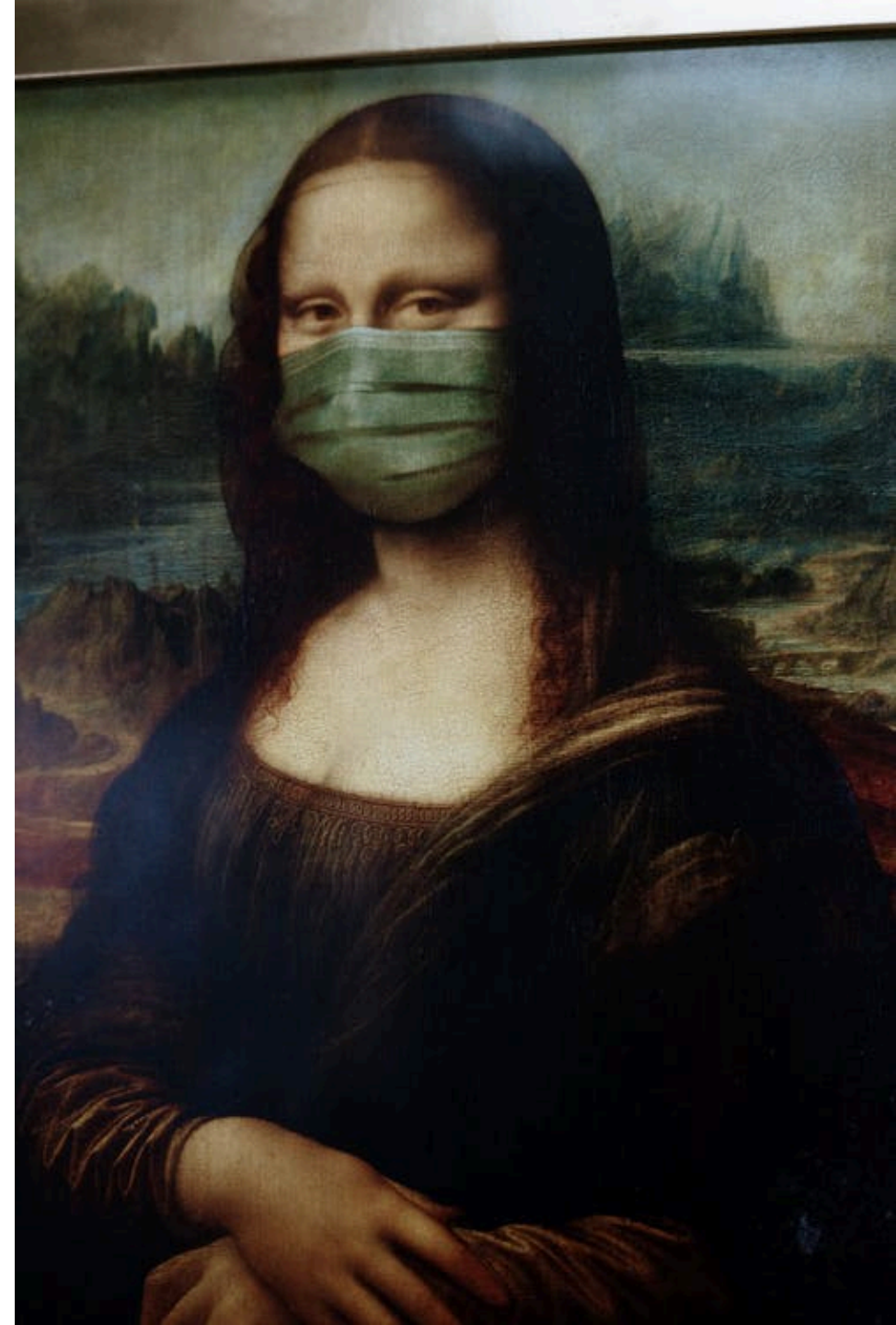
Collaborative outreach, waitlist management,
low-income housing

COVID-19 impacts



Poll Time!

- How it's impacting CEP's marketing plans
 - What we're doing about it
- Is it impacting your plans?
 - Brainstorm on ideas?



Late Fees

Problems:

- Partial payments
- High intake turnover
- LI agencies reluctant to refer



Late Fees



Poll Time!

Solutions?

- Screening and educating LI customers
- Energy Assistance for community solar
- Terminate contracts earlier for non-payment
- Other ideas?



Collaborative Outreach

Poll Time!

What if.. Multiple PM's want to work with the same partners?

- Keep marketing plans confidential
- CEP gathers PM's with same partners and work out a solution between all parties



Collaborative Outreach

Poll Time!

Marketing Plan Support Expectations

- General "best practices" for frontline communities
- In-depth review of existing plan
- Co-creation of a plan from scratch
- Educational resources already being provided
- Other



Waitlist Management

What if...

If a Project Manager has more interest than capacity in their project, and the project is full with a significant number of interested participants left. What happens to those participants?

We all want great customer experience. What's best both for the customer and the program?



Waitlist Management



Poll Time!

What happens to participants on a PM waitlist after contracts have been signed?

- I want to keep the people I recruited on my waitlist
- People on all lists should know about all their options and choose
- I want to share my participants and when I have turnover I want the LIF to help find replacement participants



Low-Income Housing

Utility allowances, HUD housing, Section 8



Low-Income Housing Scenario 1

Section 8 vouchers

- Likely no impact. Section 8 vouchers can be used anywhere.



Low-Income Housing Scenario 2

Tax Credit Buildings (OHCS has a list)

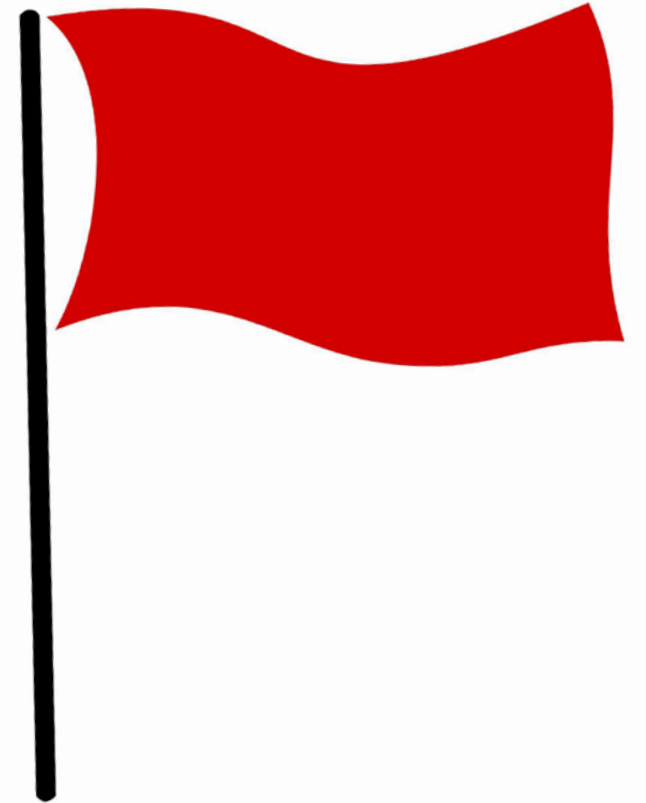
- Rent is based on income brackets.
- Allowances are generous so unlikely to hurt the LI subscribers.
- Efficient housing energy allocations will be less generous.
- If the housing provider is doing the project, they may do a building-wide utility assessment that may change the rates. If rent is impacted, money will go to the housing provider.



Low-Income Housing Scenario 3

Section 8 Housing (HUD has a list)

- Even if a portion of tenants had community solar, rent could go up for the entire building because they work with averages.
- Money goes to HUD, not individuals or housing facility. Uncommon.



Ask Low-Income Housing Partners

- What kind of housing do you run?
- What are the possible harmful consequences?
- Utility/rent allowances
- Utility bills in property manager's name
- Multi-meters
- Other questions? Concerns?



To Low-Income Housing Partners

Questions to Ask:

- Why do you want to partner with Community Solar?
- Anything we missed to consider?
- What kind of housing do you run?



Wisdom Sharing: Nonprofits

Experience working with frontline communities / nonprofits to share?



Wisdom Sharing: Solar Developers

Experience in talking to new customers about solar?



Thank You!



**OREGON
COMMUNITY SOLAR
PROGRAM**

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