



OREGON
COMMUNITY SOLAR
PROGRAM

Project Manager Workshop: Marketing Best Practices and Ongoing Subscriber Management

Presented by the Program Administration Team

Program Administration (PA) Team



Program Administration

Program Implementation Manual

Funds Management

Public Reporting

Education & Outreach

Coordination

Workshops and Demos

Platform Management

CSP Platform Configuration

Utility Integration

Data Security



Program Administration

Project Review for Pre-certification and Certification

Installation Verification

Dispute Resolution

Education & Outreach

Project Manager Registration

Customer Support

Platform Management

Application Processing

QA/QC



Program Administration

Low-income subscriber recruitment

Marketing plan support

Community education

Additional equity goals

Verification

Household income & size

Waitlist management

Previous energy use

Demographic information



Program Administration

Regulatory Policy Development

Budget Management

Contract Management

Education & Outreach

Commission Workshops administration

Public Stakeholder Engagement

Agenda

- 1 Marketing Best Practices and PM Resources
- 2 Participant Enrollment
- 3 Participant Mobility: Move, Transfer and Termination
- 4 Participant Replacement
- 5 Native Billing Cycle and Late Fees
- 6 Questions & Answers/Discussion





Marketing Best Practices and PM Resources

Marketing Best Practices

Marketing Plan

- Identify partners
- Develop customer acquisition plan

Revisit and adjust based on:

- COVID Impacts
- Different stakeholders
- Project timeline



Marketing Best Practices

Project Advertising

- Know your audience and adjust accordingly
- Communicate savings effectively and accurately
- Explaining your pricing product
- Explain the Program Enrollment Process



“By enrolling in “Project A”, you can expect to be credited with 1,300 kWh per year and receive \$99 in net bill savings!”



Marketing Dos and Don'ts



DO:

- Add **new** disclaimer and boilerplate language on marketing materials
- Provide objective evidence in support of all claims regarding bill savings
- Disclose all pricing and payment options and terms clearly
- Follow guidelines for program logo use and co-branding



DON'T:

- Don't refer to subscriptions as “free”
- Don't market yourself as “Official” or present your company as the “Program”
- Don't make any guarantees regarding performance or savings that are not included in customer contracts

Marketing Best Practices

Material/Collateral Design

- Try to advertise with fewer words
- Bullet points can reduce redundancy
- Keep logos at the top or bottom of page, not middle
- Don't use more than two types of fonts
- Limit your color palette



Marketing Best Practices

You can access solar no matter where you are, and your home doesn't even need to be sunny!

Even renters can benefit from community solar.

Logo

All you have to do is subscribe to <<Project>> and you will start to receive monthly credits on your utility bill based on your subscription size.

- By enrolling in <<Project>> you are also helping the state reach its renewable energy goals!

Design Issues

- 3 different fonts in different sizes
- Too many words in a crowded space
- Inconsistence text alignment
- Bullets v paragraph format
- Logo placement

Marketing Best Practices



Solar is within reach

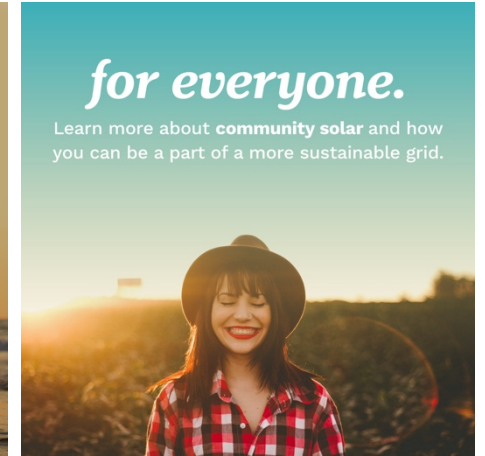
All the benefits of solar—wherever you live.

Now anyone can get the benefits of solar power—even without a sunny roof of your own. Whether you own your home or rent, by subscribing to << Project >> you'll get credits on your utility bill for the energy produced, and you'll be supporting clean, renewable energy.

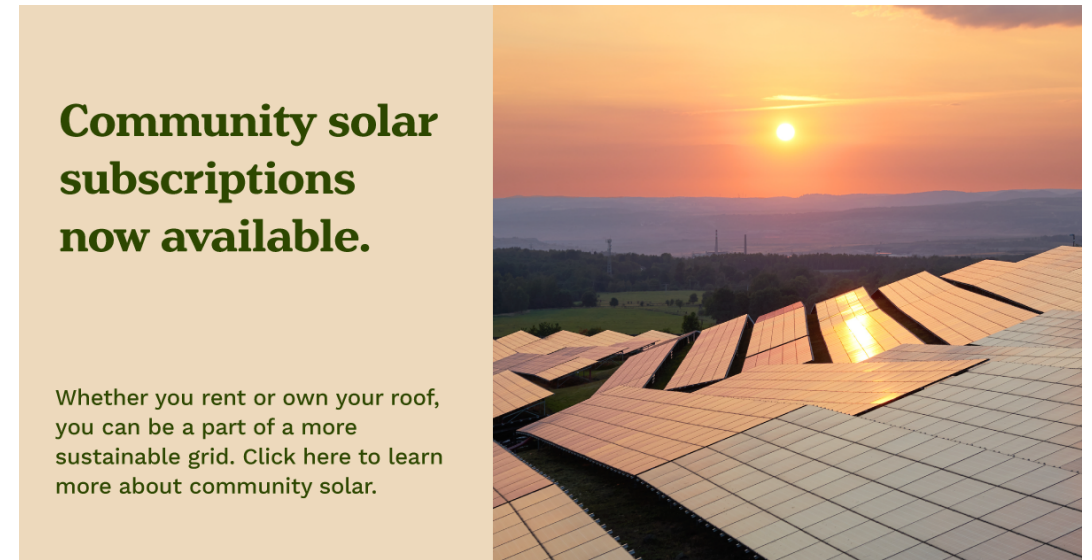
Templates

- Social Media Examples
- Webpage in a box
- Talking points re: pricing products and guides
- Marketing guidelines – general audience and low income

Resources coming soon!
Find them at oregoncsp.org



Instagram and Facebook marketing mockup



LinkedIn and Facebook marketing mockup

Community Based Organizations (CBOs)

CBO's make great partners!

Mission Overlap and the Right Person

- Does community solar support THEIR mission?
- Could a community solar subscription do harm to their clients?
- Is your contact working directly with LI customers? Do they have systems already in place that can be used?



CBOs and Outreach

Patience and Funding

- CBOs are often over-capacity and take time to respond and follow-through.
- Frontline communities are heavily impacted by COVID-19 and the fires, increasing and complicating workloads for CBOs serving LI customers.
- Consider sponsorship or a donation
- CBOs will likely ghost anybody who makes them feel pressured or guilty. Instead focus on gratitude and acknowledgement of their work and time.
- CBO relationships should last for many years!



Building Long-Term Trust

Understanding the Program

- Be honest about pros AND cons
- **BILL savings**, not rate savings
(10-14% annual savings)

Utilize CEP

- Use already designed materials and language
- Co-presentations, meetings
- Nonprofit "cred" to vouch for program
- Check in when you want to – brainstorm about what's working and what's not



The background of the slide features a bokeh effect with out-of-focus light circles in shades of orange, yellow, and teal against a dark, muted teal background. A white rectangular box is centered on the slide, containing the title text in orange.

Subscriber Management: Enrollment, Mobility, Transfer and Terminations



Participant Enrollment

Participant Enrollment – Policy

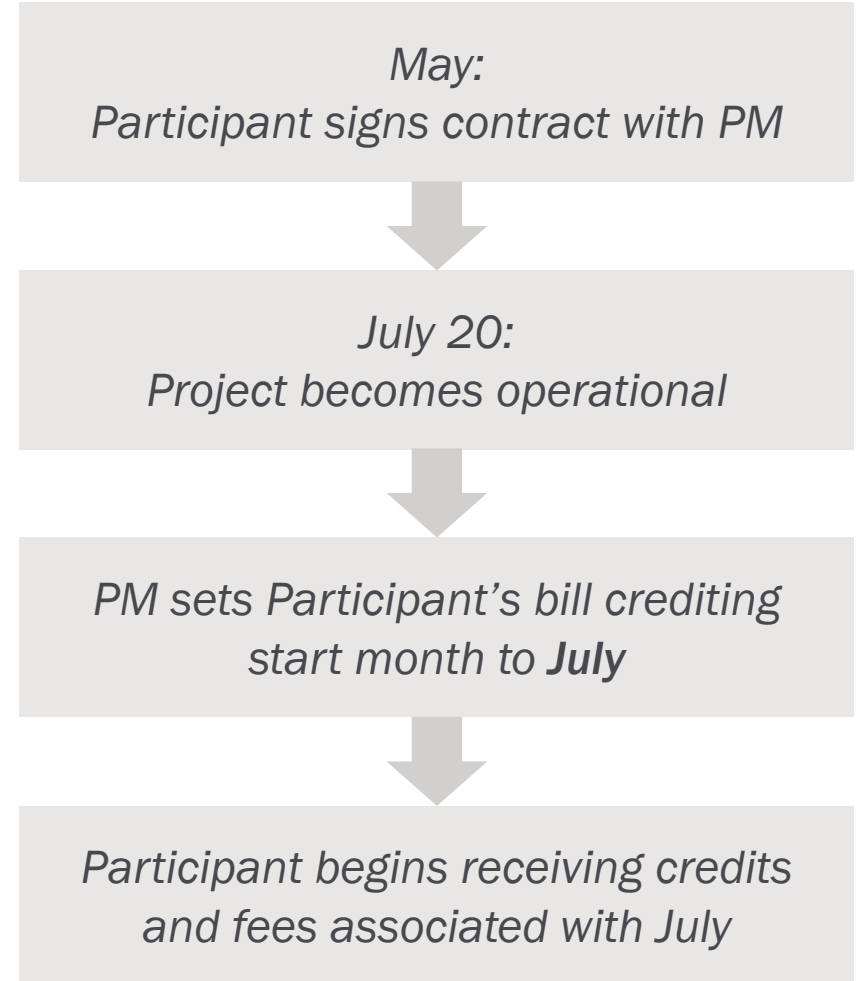
- A new Participant's subscription **always begins on the 1st of the month**. The PM and the Participant agree on the effective enrollment month.
- A subscription is not activated until the project has been certified and is energized and operational.
- If a project becomes operational mid-month, Participants who are already subscribed to the project will receive bill credits and kWh subscription fees based on the **first partial month of operation**.
- If a Participant is enrolled in Project that is already operational, the PM has the ability to set the subscription to start on the first of the current, or future month.
- **kW-based fees are never prorated**. Participants will always be charged the full month's Program Fees (or subscription fees if based on kW).

Participant Enrollment – Example 1

First month of project generation:

A Participant signs a contract with a Project Manager in May and the project becomes commercially operational on July 20. The Project Manager sets the bill crediting start month to July.

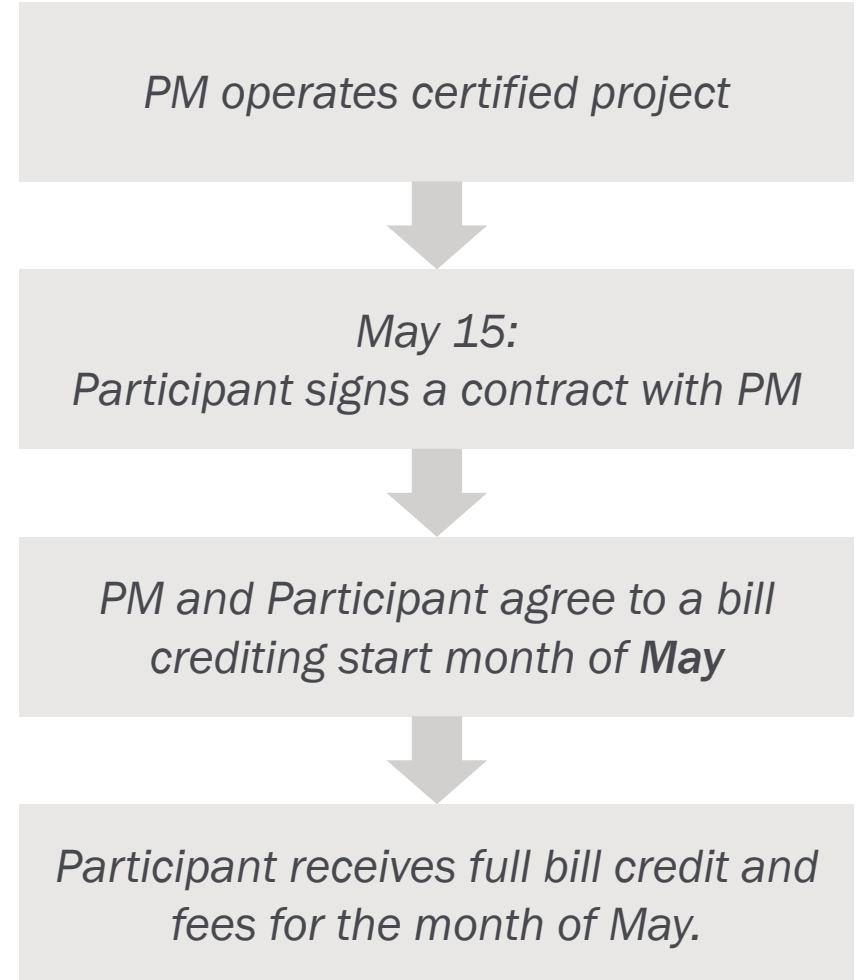
The Participant will begin to receive credits and fees associated with July's partial project generation and will be charged the full monthly program fee for July.



Participant Enrollment – Example 2

New participants subscribing to an operational project:

A Participant signs a contract with a Project Manager on May 15 and agrees on a bill crediting start month of May. The Project Manager will enter the effective enrollment month as May and the Participant will receive the **full bill credit, subscription fee and program fees for the month of May**.



Participant Enrollment

PMs must pick a Bill Crediting Start Month

- Choose "Unknown" if project certification or interconnection dates are not yet known.
- Start months can be as early as the achieved Operational Date if the project has been Certified.
- Start months can be the current month, or any month in the future.
- Start Months determine the capacity that is considered "unsubscribed" on a monthly basis.

[Account Settings](#) [Company Profile](#) [Project Dashboard](#) [Project Managers](#) [Participant Dashboard](#)

Participant Enrollment Form

ContractID - 355

Status: Draft
Low-Income Verification: Not Verified
Participant Status: Pending Connection

Application | Documentation | Submit | Administration | History

<Changes to the participant application may also require changes to the participant invitation>

PARTICIPANT INFORMATION

First Name* Clark	Email* ckent@superman.com
Last Name* Kent	Electric Utility* Idaho Power
Primary Utility Account Holder, as it appears on the bill* Clark Kent	Utility Account Number* 1111111111
Phone Number* 555-555-5555	Utility Meter Number* 1111111111
Customer Type* Residential	Utility Service Agreement Number* 1111111111
Site Address* 123 Farmstead St.	
City* Metropolis	Zipcode* 99999

EDIT

SUBSCRIPTION INFORMATION

Project ID IP-2020-202	<div>SELECT PROJECT</div>
Product Name Solar Idaho 407	<div>SELECT PRODUCT</div>
Subscription Capacity 10.00	
Bill Crediting Start Month* February 2021	
Total Capacity: 2,500.00 Available Capacity: 2,490.00	

SAVE

CANCEL

CONSUMPTION VERIFICATION

Consumption Verification Method* Automated by Program Administrator

EDIT

Participant Enrollment

- Ensure utility account information is provided accurately. Errors could result in delayed credits and payments
- It is the PM's responsibility to resolve errors. The platform will keep sending credits and fee information until the record is accepted by the utility.

The screenshot shows the 'Payments Ledger' interface for the Oregon Community Solar Program. At the top, there is a navigation bar with links: Home, About, Subscribers, Project Managers, Projects, FAQ, My Account, and Logout. Below this is a secondary navigation bar with links: Account Settings, Company Profile, Project Dashboard, Participant Dashboard, and Payments Ledger (which is highlighted). The main heading is 'Payments Ledger'. Below the heading is a search bar labeled 'Search by Project Name' with a 'Search' button. There are four tabs: 'Unsubscribed Power', 'Project Payments', 'Monthly Participant Records', and 'Billing Errors' (which is selected and highlighted in green). Below the tabs is a table with the following columns: Month, Participant ID, Participant Name, Project ID, Error Code, Error Description, and Resolved. The table contains three rows of data:

Month	Participant ID	Participant Name	Project ID	Error Code	Error Description	Resolved
05/2021	53	Jessica Rodriguez	ABC-2020-123	6	Account or subscription closed - unable to bill	<input type="checkbox"/>
05/2021	55	Megan Davis	ABC-2020-123	2	Utility account not found	<input type="checkbox"/>
03/2021	62	Earnest Brown	ABC-2020-123	5	Service agreement number not associated with account number	<input checked="" type="checkbox"/>

At the bottom of the table, there is a pagination control showing '1 to 3 of 3' with navigation arrows.

Errors will be listed in the Billing Errors tab of the Payment Ledger

Participant Enrollment – Participant Verification Process



The PA will verify Participant eligibility in weekly batches.

This includes verification that a Participant's subscription size is appropriate.

PA responses regarding subscription size could include:

- *If the subscription would exceed a participant's **average** recent annual consumption:* the PA will ask the PM to **reduce** the contract size or provide additional detail justifying consumption size.
- *If the subscription would exceed a participant's **minimum** recent annual consumption:* the PA will advise the PM and participant of the possibility of oversubscription but not request a contract change.
- *If the subscription is less than a participant's **minimum** recent annual consumption:* the PA will verify the subscription size without note.

A photograph of a paved road winding through a dense forest of tall, slender trees, likely redwoods. The road has a double yellow line in the center and white lines on the edges. Sunlight filters through the dense canopy of green needles, creating a dappled light effect on the road and the forest floor. The trees are very tall and thin, with some showing signs of moss or lichen. The overall atmosphere is serene and natural.

Participant Mobility

Participant Mobility – Policy

- Allowing for Participant mobility is an important program feature. Participants must be able to move within their utility territory and take their subscription with them to their new location.
- When a Participant moves to a new address during their CSP contract term, there are three possible scenarios that may occur:
 1. **Gap scenario:** Participant ends utility service one or more days before new service begins.
 2. **Overlap scenario:** Participant begins new utility service before ending existing service.
 3. **No gap/overlap scenario:** Participant ends utility service the same day as new service begins.

Regardless of the scenario, the Participant will continue to be subject to monthly CSP credits and fees if they are considered an active CSP participant. **Enrollment status is determined and managed by the PM in the Platform.**

Participant Mobility – Move Policy

- Once the end-service request is processed by the Utility, the Utility may process a closing bill without CSP credits/fees to close out the Participant's existing utility account.
- The Participant's next bill at the new location will **include** CSP credits/fees from the previous month if the Participant's new service account details are entered in the Platform by the PM **within the month in which the customer has ended their electric service.**
- If the Participant's new service date and account details are not recorded by the PM within the month in which service at the previous location has ended, **the accumulation of these credits/fees will be added to the Participant's bill when new service is established and the account details are recorded in the Platform.**
- Longer gaps in electric service may contribute to a risk of oversubscription.

Participant Mobility – Move Policy



It is the **Project Manager's** responsibility to update the customer's record in the Platform with an effective date as the first day the customer requests to record consumption for CSP purposes at the new location.



It is the **Participant's** responsibility to contact their Project Manager with the account details of their new location and requested transfer effective date as soon as possible.

If the Participant fails to alert the Project Manager of a move, the Project Manager will be alerted in the Program Platform after the utility account is closed. **In this case, the PM must follow up with the Participant to confirm the new account details or terminate the enrollment.** Once the new account details are entered, CSP credits and charges will then be reflected on the customer's account at their new address.

**Note: Customer moves are a good time to reconsider whether the subscription size is appropriate for their expected electric load at their new location.*

Obtaining New Account Information

The **required account details** include the following utility identifiers:

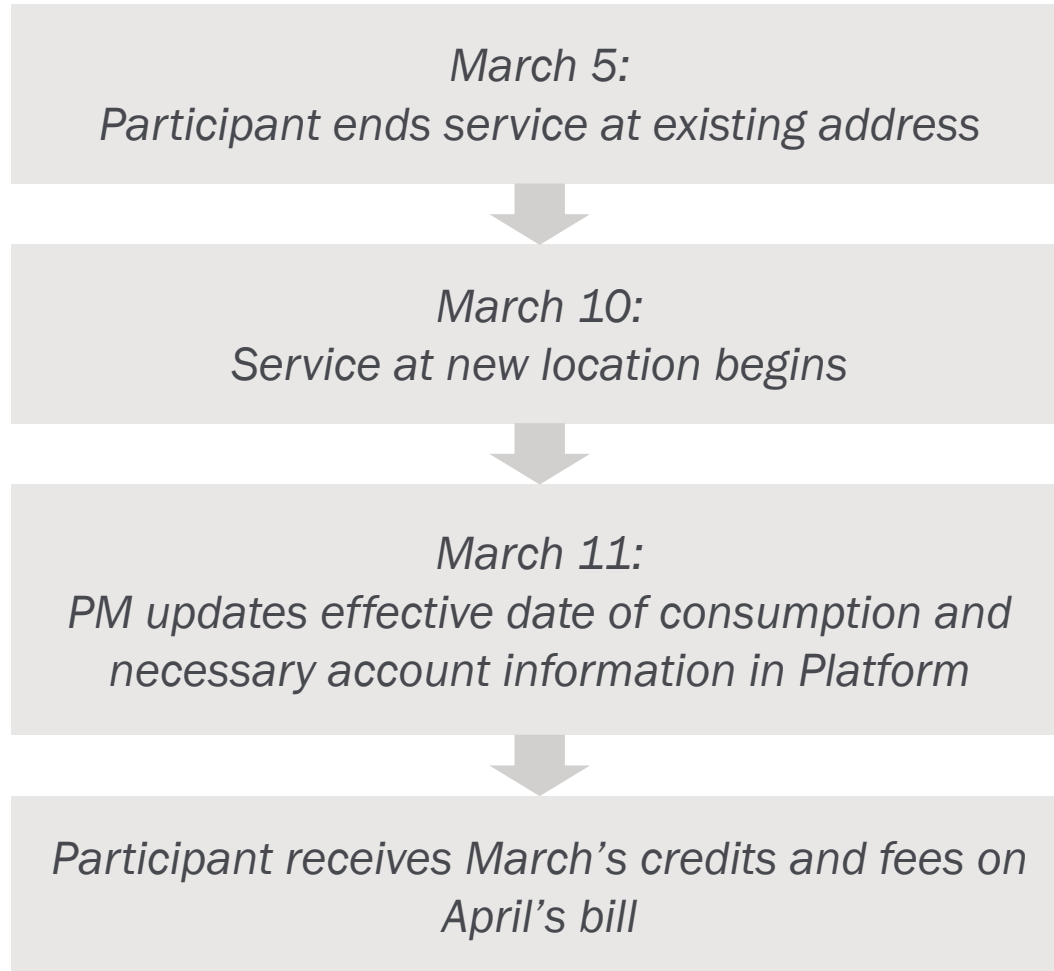
- Utility Account Number
- Meter Number
- Service Agreement Number

Prior to the Participant receiving their first bill, this information can always be obtained directly from the utility's customer service number:

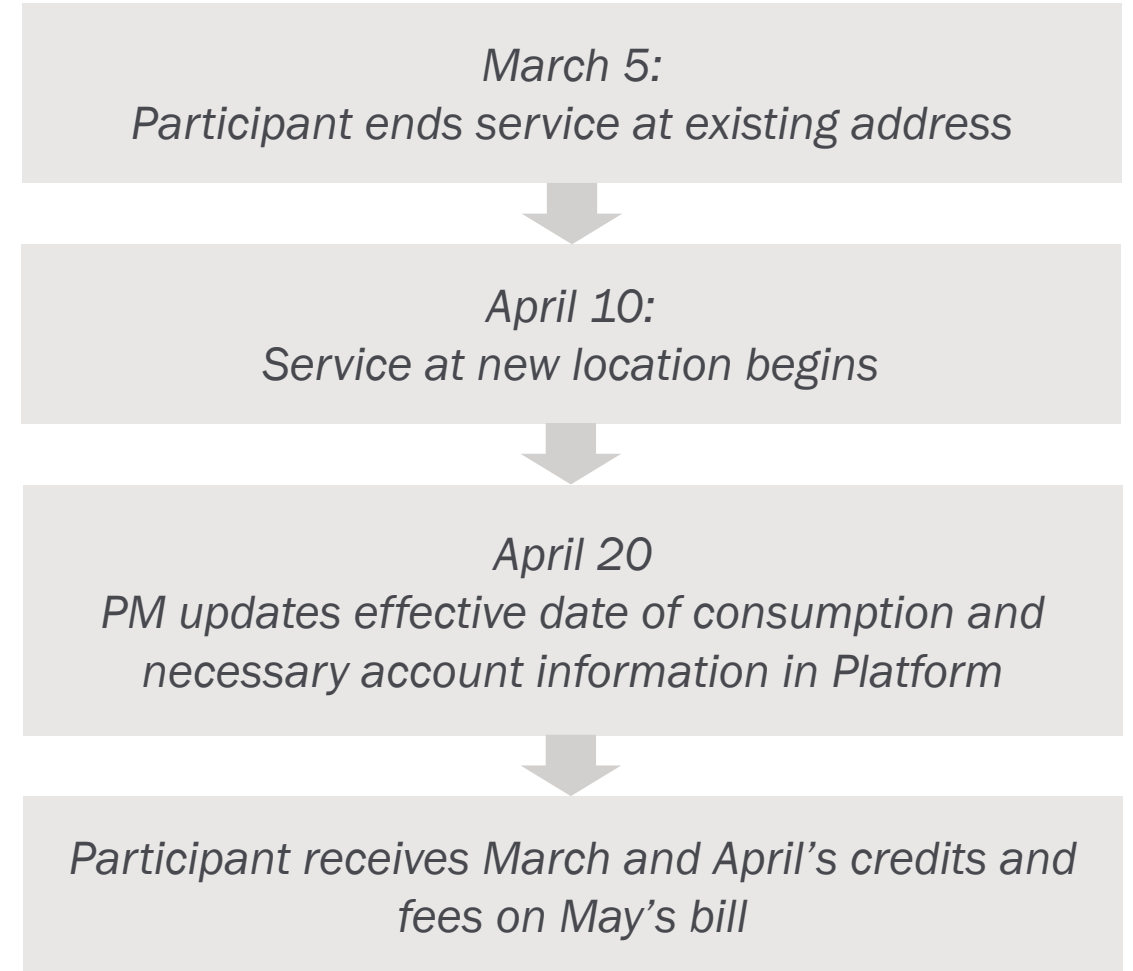
- **PGE:** 800-542-8818
- **Idaho Power:** 1-800-488-6151
- **Pacific Power:** 1-888-221-7070
 - Customer is also able to obtain this information from the online portal.
- Please remember to reference the **Participant Enrollment Guidance Document** under Project Manager Resources on oregoncsp.org for formatting requirements.

Move Example #1 – Gap Scenario

Small Gap:

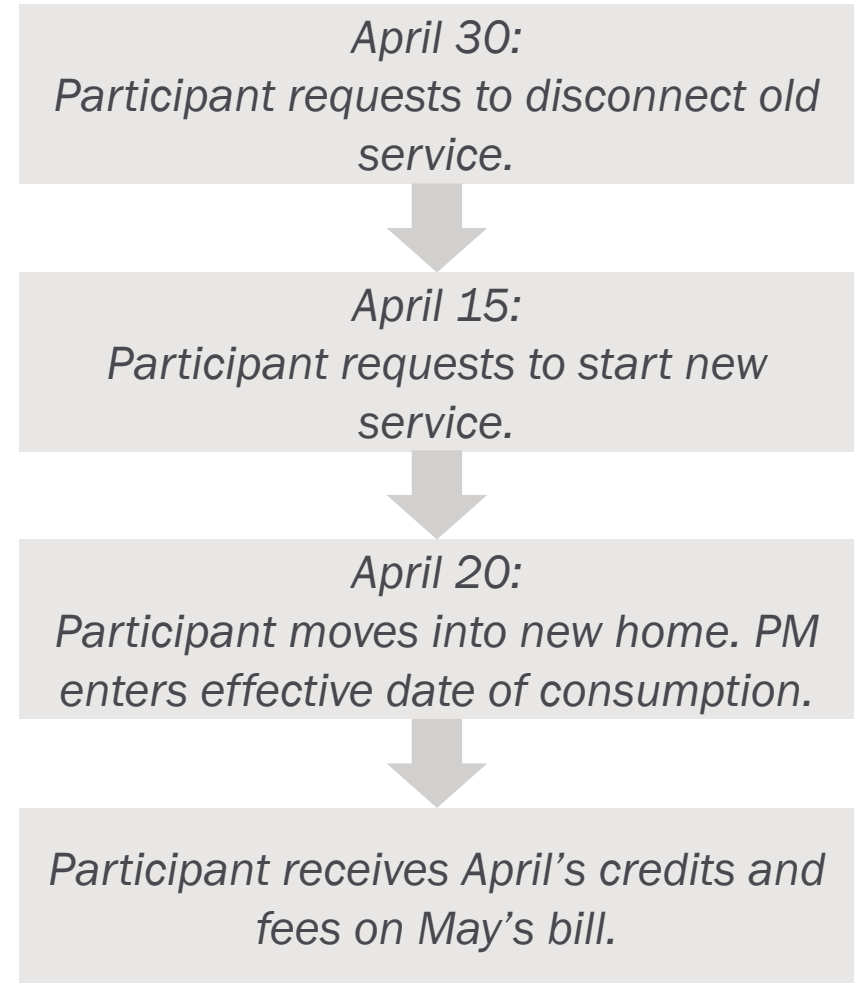


Large Gap:



Move Example #2– Overlap Scenario

A Participant may only enroll one site per CSP contract at a time. Therefore, if a CSP Participant begins electric service at a new location before ending existing service, they should contact the Project Manager and provide the details of the new account along with the date they would like the transfer to take effect.



Move and Transfers

Contract Edit Options:

- Move to new location
- Transferring contract to someone else
- Change the capacity subscription size
- Change pricing product
- Cancel the contract

Account Settings Company Profile Project Dashboard **Participant Dashboard** Welcome, mrs.andrea

Participant Enrollment Form

ContractID - 242

Status: Verified
Low-Income Verification: Eligible
Participant Status: Operational

Application Documentation **Submit**

EDIT CONTRACT

What change do you need to make?
Move to a new location ▼

Effective date of consumption at new location.
mm/dd/yyyy

Utility Account Number*
1234567890

Utility Meter Number*
0987654321

Utility Service Agreement Number

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SUBMIT

A photograph of a modern building's glass entrance. The glass reflects the surrounding environment, including a staircase and a sign that reads "EXIT TO PLAZA". The text "Participant Terminations and Replacements" is overlaid in white serif font.

Participant Terminations and Replacements

Participant Termination

A Participant termination may happen under three scenarios:



1.

Participant remains in utility service territory but **terminates their CSP subscription early.**



2.

Subscription ends at **completion of the contract term.**



3.

A Participant **ends utility service** during the CSP contract term.

Participant Termination – Ending subscription early

- A Participant's subscription begins on the first day of the calendar month and ends on the last day of the calendar month.
- If a Participant decides to end their subscription early, they will receive credits and fees on their bill through the end of the month in which they requested termination.



Example:

A Participant requests to end their program subscription on **May 3**, therefore the cancellation technically is effective on **May 31**.

The Participant will receive bill credits and fees through May on either their June or July bill, dependent on their native billing cycle.

Participant Termination – Completion of Contract Term

- A Participant's subscription begins on the first day of the calendar month and ends on the last day of the calendar month.
- Regardless of the date in which the contract is terminated, a Participant's subscription ends on the last day of the calendar month of termination.




Example:

A Participant's contract expires on **April 15, 2032**.

The Participant will receive April's credits and fees on the May (or June) bill. This will be the last bill they receive with CSP information.

Participant Termination – Ending Utility Service

- A Participant's subscription begins on the first day of the calendar month and ends on the last day of the calendar month.
 - If a Participant disconnects service from their utility in the middle of a month, the Utility may not be able print the final bill in time to display the last month's CSP credits and fees.
- 

The Project Manager has two options for managing moves out of territory:

- 1. Collect final subscription fees off-bill** (this is optional).
- 2. Slot in a new Participant** to take over the exiting subscriber's last month of subscription capacity.

Move out of Territory – Participant Replacement




Example:

The PM is informed through the platform that Paul will no longer be a utility customer of PGE on September 9. As a result, September's generation credits and fees will not show up on Paul's bill. Rather than forgoing September's subscription fee or sending Paul an off-bill invoice, the PM can cancel Paul's enrollment and enroll Sarah to take Paul's subscription capacity.

- The Platform will update the PM twice a month about the utility account status of each subscriber.

Participant Replacement

- When cancelling a contract, you have the option to immediately replace the capacity with a new participant.
- Cancelled participant will still be subject to any outstanding fees through the previous month
- New participant will start new term contract, effective date of replacement

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Welcome, mrs.andreavas@gmail.com (Project Manager)

Account SettingsCompany ProfileProject DashboardParticipant Dashboard

Participant Enrollment Form

ContractID - 242

Status: Verified
Low-Income Verification: Eligible
Participant Status: Operational

ApplicationDocumentationSubmit

EDIT CONTRACT

What change do you need to make?
Cancel contract ▾

Effective date of replacement?
September 2020 ▾

Replace this capacity with a new participant?
Yes ▾

New participant contract ID
243

SAVECANCEL

Participant Contract Transfers




Transfer Policy

- Participants may transfer their subscription to another eligible customer of their choosing within the same utility territory. The new customer picks up where the exiting customer left off **within the contract term**.
- If an active Participant would like to transfer their subscription to another customer at a **different address**, they should contact the Project Manager and provide the details of the new account along with the date they would like the transfer to take effect.
- Low-income customers can only transfer subscriptions to members of the same household.
- If an active Participant would like to transfer their subscription to another customer at the **same address**, they should contact the Project Manager and provide the name and contact information of the new customer, along with the month they would like the transfer to take effect.



Participant Transfer

- When transferring to a new person, they inherit the consumption history of the original contract holder.
- At true up in April, the consumption of both is considered and any over-subscription is owed by the new contract holder.
- The new person is subject to all pending program charges and credits.



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[Account Settings](#) [Company Profile](#) [Project Dashboard](#) [Participant Dashboard](#)

Welcome, mrs.andreavas@gmail.com (ProjectMan)

Participant Enrollment Form

ContractID - 242

[Application](#) [Documentation](#) [Submit](#)

Status: Verified
Low-Income Verification: Eligible
Participant Status: Operational

EDIT CONTRACT

What change do you need to make?

Transfer contract to someone else

Effective date of transfer to new person?

mm/dd/yyyy

Is the new contract holder at the same address?

Yes

Email*

the.andreavas+3@gmail.com

First Name*

Jane

Phone Number*

555-555-5555

Last Name*

Austen

Primary Utility Account Holder, as it appears on the bill*

Jane Austen

SAVE

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Enrollment, Transfer and Termination Summary



The **Project Manager** is responsible for updating the Participant's effective enrollment and termination months.



The **Utility** is responsible for confirming whether a Participant's **electric account** is open or closed.

- If the electric account is **open** and the customer is an active CSP participant, billing proceeds as normal.
- If the electric account is **open** and the customer is **not** an active CSP participant, the Utility will process the final month's CSP credits/fees on the next Utility bill.
- If the electric account is **closed** and the customer is an active CSP participant, the PA will accumulate generation credits and fees and include them as a lump sum on the next bill once electric service is re-established.
- If the account is **closed** and the customer is **not** active an active CSP participant, the Utility will send the participant their final electric bill without CSP credits/fees.

Enrollment, Transfer and Termination Summary

- Generally, any Participant that is enrolled in any given month is assigned the subscription fee for that month.
- However, if a Participant wishes to transfer their subscription to another customer, or if a PM wishes to replace an exiting customer's capacity with a waitlisted customer, the new customer can take over the subscription in the current month.

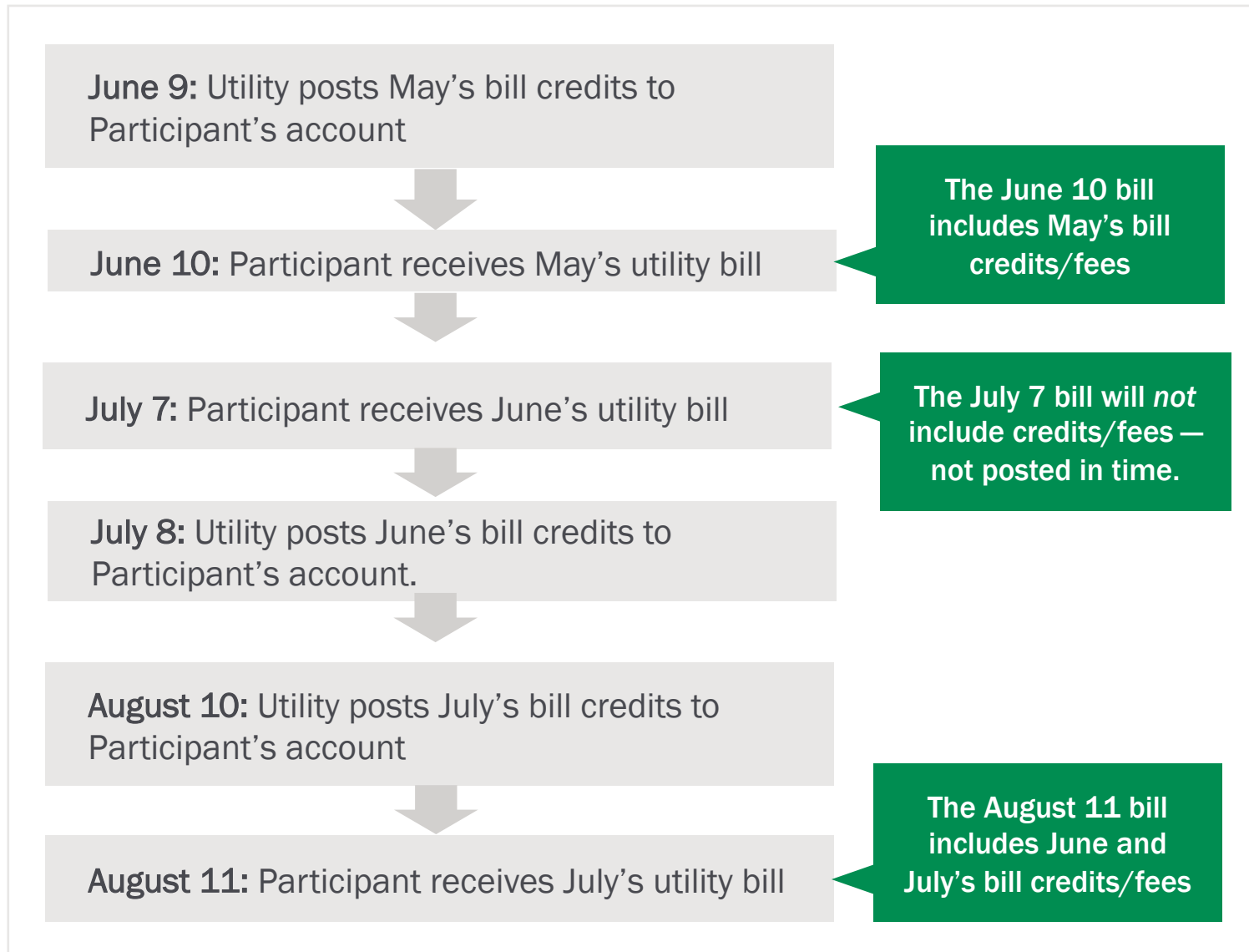


Late Payment and Native Billing Cycles

Native Billing Cycles

- On the 6th business day of every month, the utility will “post” the solar generation credits from the previous month to be participant’s account. Due to their billing cycles, Participants may either receive their credits on the next month’s bill, or with a one-month lag.
- Due to slight variations in the posting date and naturally occurring variations in a Participant’s native billing cycle, some Participants may be impacted if they receive their bill both before *and* after the posting date at different points throughout the year.
- In this case, the Participant may receive no bill credits or subscription fees on one bill and would then receive bill credits and subscription fees for two-months’ worth of data on the next bill.

Native Billing Cycle “Skip/Double” Example



Participants that may experience this “skip/ double” scenario are those that receive their utility bills on or around the **6th business day** of each month (the date the utilities post bill credits and fees from the previous month).

Billing Cycles Options and Considerations

- The billing cycle for customers in any utility territory can be switched to prevent the skip/double scenario.
- The PA is developing a guide to help PMs and customers identify their billing cycle and provide instructions for making a change.
- A customer is **not** obligated to make any changes to their native billing cycle and/or bill print date as a condition of participation. Billing cycle modifications will change the expected bill due date and may have financial implications for the customer.
- Project Managers **can** see the date the CSP credits and fees were printed on each customer's bill through the program platform.

Tracking Participant Utility Payments



Payments Ledger

Search by Project Name

Search

Unsubscribed Power	Project Payments	Monthly Participant Records
--------------------	------------------	-----------------------------

Generation Month	Participant ID	Participant Name	Project ID	Subscription Size kW	Attributed Generation kWh	Subscription Fee Due	Subscription Fee Collected	Print Date	Due Date*	Payment Status
05/2021	53	Jessica Rodriguez	ABC-2020-123	13.0	95	\$10.45	\$0	06/09/2021	7/01/2021	Late
05/2021	55	Megan Davis	ABC-2020-123	5.5	40	\$4.40	\$0	06/12/2021	7/15/2021	Not yet Paid
05/2021	32	Earnest Brown	ABC-2020-123	10.0	73	\$8.03	\$2.00	06/30/2021	8/01/2021	Partial

* Due Dates are calculated as the utility’s bill print date plus a grace period of at least one month



Q&A/Discussion

Thank You!



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Contact:

Oregon Community Solar Program

administrator@oregoncsp.org