

**Energize NY**  
**COMMUNITY REQUEST FOR INFORMATION (“RFI”)**  
***HeatSmart-CoolSmart Orange Pilot Campaign***  
**2018 - 2019**

Energize NY invites its members to submit applications to be considered for the pilot HeatSmart-CoolSmart Orange campaign to promote clean heating and cooling systems (geothermal technology and cold-climate air source heat pumps) and energy efficiency to homeowners.

<b>Key Information for Submitting Request for Information</b>	
Re-Issue Date	Mon., October 22, 2018
Qualified Applicants	Orange County Cities, Towns or Villages and / or Coalitions of Towns and Villages for which <i>any</i> of the following applies (1) are members of Hudson Valley Regional Council, (2) have an active CAC, (3) were an active participant in a Solarize campaign, or (4) have Clean Energy Communities designation.
Due Date	Friday, November 16th, 2018
Submission Instructions	Email application to Lauren Brois at <a href="mailto:Laurenb@Energizeny.org">Laurenb@Energizeny.org</a> with subject line written as: “ <i>HeatSmart-CoolSmart Orange [NAME OF COMMUNITY] RFI.</i> ” The application should be sent as two attachments as follows: 1) “ATT A [NAME OF COMMUNITY]” should contain Attachment A, the letter from the chief elected official (if for a consortium, these documents for the consortium communities should all be scanned together). 2) “ATT B [NAME OF COMMUNITY]” containing Attachment B (a single form even if for a consortium).
RFI Question Instructions	Questions should be directed to Lauren Brois at <a href="mailto:Laurenb@Energizeny.org">Laurenb@Energizeny.org</a> or 914-302-7300 ext. 8102. We welcome the opportunity to answer questions and assist with your submission.
Technical Submission Questions	Contact Lauren Brois at <a href="mailto:Laurenb@Energizeny.org">Laurenb@Energizeny.org</a> or 914-302-7300 ext. 8102, or Carolyn Cassata at <a href="mailto:Carolync@Energizeny.org">Carolync@Energizeny.org</a> or 914-302-7300 ext. 8107.

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## Program Summary

The Energize NY Residential Program, engaging communities with the Home Performance with Energy Star Program and operating the Energize NY Comfort Corps Contractor list has assembled a team of clean energy experts and implementation partners for the proposed HeatSmart-CoolSmart Orange Program. Energize NY-Residential has contributed to the high uptake of Home Performance projects in Westchester County, with over 1,300 projects completed since Energize inception in 2011. Through the HeatSmart-CoolSmart Orange Program, the Energize NY Team will assist local communities in offering high quality, competitively-priced Clean Heating and Cooling (CH&C) installations from vetted contractors, and energy efficiency solutions to homeowners within the chosen communities.

Heating and cooling energy expenditures are responsible for one third of the carbon emissions in Orange County and New York State. The options offered to homeowners in the HeatSmart-CoolSmart Orange Program, discussed in detail further in this RFI, provide a proven way for individuals and communities as a whole to improve local sustainability, save on heating and cooling costs, gain positive returns on investment with incentive programs and tax credits, and create a beneficial impact to air quality, family and public health, and the environment.

The following organization, comprising the HeatSmart-CoolSmart Orange Campaign Team, will administer and implement the HeatSmart-CoolSmart Orange Program:

### **Energy Improvement Corporation – Sponsor and Campaign Manager**

Yorktown Heights, NY 10598

Energy Improvement Corporation is a New York State non-profit, local development corporation that operates Energize NY. Energize NY and the HeatSmart-CoolSmart Orange Campaign Team requests submissions from an Orange community (including cities, towns, and villages) or a coalition of towns and / or villages to participate (one joint application may be submitted on behalf of the applying coalition) in this initial HeatSmart-CoolSmart Orange Pilot Campaign, scheduled to launch in Late November / Early December 2018.

Once the HeatSmart-CoolSmart Orange Community (either one city, town, or village, or a coalition of towns and / or villages) is selected, the HeatSmart-CoolSmart Orange Campaign Team will begin the process of selecting CH&C installers through a separate Request for Proposal (“RFP”) process. The selected CH&C installers will provide, at a minimum, competitive pricing, home CH&C assessments, collaboration in community outreach, and installation services. The selected HeatSmart-CoolSmart Orange Community and selected installers, with support from the HeatSmart-CoolSmart Orange Campaign Team, will develop and implement an approximately 20-week community outreach campaign beginning in Late November / Early December 2018, with the goal of dramatically increasing the number of existing CH&C installations in the HeatSmart-CoolSmart Orange Community.

**A successful HeatSmart-CoolSmart Orange Pilot Campaign is dependent on committed and well-connected volunteers and community leaders**, particularly in identifying creative and effective ways to get the word out to their community about HeatSmart-CoolSmart Orange. Impactful teams will work collaboratively on a variety of tailored outreach approaches. Their objective is to encourage as many homeowners as possible to consider installing CH&C systems, especially those who may not have previously considered it, and increasing familiarity with CH&C technology and energy efficiency measures in general to displace fossil fuel-based heating and cooling systems.

**The objective of HeatSmart-CoolSmart Orange is to significantly ramp up the rate of CH&C system adoption and energy efficiency in Orange County, by creating and servicing a demand for clean energy options in home heating and cooling.** HeatSmart-CoolSmart Orange will accomplish this by encouraging public and positive conversations about CH&C adoption throughout our region, and by demonstrating CH&C success stories. Communities interested in HeatSmart-CoolSmart Orange should also consider how they might leverage the CH&C outreach to further other local energy efforts.

**The success of the Solarize Program, Energize Program, and similar programs inspired the HeatSmart-CoolSmart Orange Program.** For examples of other community-based CH&C programs, see the HeatSmart-CoolSmart Tompkins program in Tompkins County, NY and HeatSmart-CoolSmart Mass in various communities within Massachusetts.

## SECTION ONE – Detailed Opportunity Summary

### A. Program Goals and Overview

#### i. Program Goals

HeatSmart-CoolSmart Orange is a program aimed at making the CH&C systems more accessible to homeowners across the County, as well as to demonstrate the viability of the HeatSmart-CoolSmart Orange Program to be replicated in other regions of New York State. HeatSmart-CoolSmart Orange will:

- A. Substantially increase the number of CH&C installations in the selected community or coalition of communities during the outreach campaign;
- B. Lower barriers to adoption of CH&C systems and installations through careful selection of CH&C installer partners and community endorsement of the HeatSmart-CoolSmart Orange Program;
- C. Provide education and outreach about benefits of CH&C technology to support the continued increase in adoption of CH&C throughout Orange in a way that can be sustained beyond the timeframe of the HeatSmart-CoolSmart Orange campaigns.

The HeatSmart-CoolSmart Orange Program will promote two prime heating and cooling technologies, as well as energy efficient building envelope improvements, as detailed below:

1. **Cold-Climate Air Source Heat Pump systems** (as defined by the Northeast Energy Efficiency Partnership), which can operate down to temperatures of five degrees Fahrenheit while also maintaining an efficiency factor of 1.75 or greater. These will include:
  - a. **Cold-Climate Air Source Heat Pump systems** that distribute the heating and cooling output through an air duct distribution system.
  - b. **Ductless Mini-Split Cold-Climate Air Source Heat Pump systems** that utilize the same two main components as central Cold-Climate Air Source Heat Pumps: an outdoor compressor / condenser and an indoor air-handling unit.
2. **Ground Source Heat Pump systems** for space heating & cooling, and water heating. An indoor heat pump unit and a heat exchanging ground loop buried underground transfer heat between the ground and the building (these systems are also known as geothermal installations). Specifically, **we will be promoting the Dandelion Energy (“Dandelion”) vertical closed-loop Ground Source Heat Pump systems** that use a ground loop to circulate an anti-freeze to exchange heat in vertical configurations, with column wells of up to 500 feet deep. Dandelion is an independent geothermal heating and cooling company, incubated by Google’s parent company. Dandelion uses proprietary technology and processes that allow them to reduce the cost of geothermal installations. Additionally, Dandelion offers 100% financing to customers.

3. **Building Envelope Improvements:** The NYSERDA Home Performance Program with Energy Star Program addresses air sealing, insulation, and upgraded heating mechanicals through a comprehensive home energy assessment done by a BPI certified contractor. These measures address tightening the building envelope with measures including, but not limited to, adding dense pack insulation, blown cellulose, and mechanical upgrades. These measures will ensure that the building envelope, distribution system, and existing heating and cooling systems are considered so that the CH&C technology is appropriately sized.

#### **ii. Barriers HeatSmart-CoolSmart Orange is Designed to Overcome**

The HeatSmart-CoolSmart Orange Program is designed to overcome common barriers that homeowners currently face in transitioning to CH&C systems:

##### **A) Lack of CH&C / Energy Efficiency Knowledge**

- CH&C technology is unfamiliar to many homeowners and HeatSmart-CoolSmart Orange aims to make the technology, benefits, pricing, and installation process accessible and simple to understand.
- For many people, the most complicated aspect of transitioning to CH&C is figuring out how to begin a process that is quite unfamiliar to them and their fellow community members. HeatSmart-CoolSmart Orange provides several easy starting points: check out the online resources, come to an event, and perform a simple home analysis online.
- Having several highly-vetted installers reduces uncertainty about how to choose an installer and provides a sense of certainty that the installer is both well-qualified and offers transparent, competitive pricing.

##### **B) Trust**

- An experienced team coordinates the HeatSmart-CoolSmart Orange Campaign. Within each community, a “Core Team” of dedicated community volunteers champions the program.
- HeatSmart-CoolSmart Orange Core Team outreach is designed to (1) provide residents with safe and accessible ways to learn about CH&C systems from people they know in their communities, (2) meet neighbors who also want to learn about CH&C technology, and (3) take the next step when they are ready (i.e., attending a workshop, discussing with the selected installer, and signing a contract to install a CH&C system).
- HeatSmart-CoolSmart Orange is designed to be as transparent as possible with all relevant information, including detailed campaign information, available through the Energize websites.

##### **C) Cost**

- HeatSmart-CoolSmart Orange outreach helps reduce the typical cost for a CH&C installer to acquire customers and can lead to numerous installation jobs for selected installers. The concentrated focus on a narrow geographical area for the limited period of the campaign produces efficiencies for the installers in travel and staff time. These factors help the selected HeatSmart-CoolSmart Orange installers to offer competitive pricing for quality installations.

Through the HeatSmart-CoolSmart Orange Program, we are helping deliver lower cost CH&C and energy efficiency options with transparent pricing.

- Information about financing CH&C will be available via HeatSmart-CoolSmart Orange online resources.

#### **D) Inertia**

- Deadlines matter. Having an approximately 20-week timeframe to act is important. Residents must sign a contract with the installer by a certain date to take advantage of the special pricing offer. The actual installation can take place after the program window passes.

#### **E) Other**

- Standardize equipment specification and design processes across the selected community.

### **iii. HeatSmart-CoolSmart Orange Campaign Process:**

In this HeatSmart-CoolSmart Orange Pilot Campaign, the HeatSmart-CoolSmart Orange Core Team of community volunteers will follow a four-step process:

1. Apply to be a HeatSmart-CoolSmart Orange Community.
2. Prepare for Campaign Launch.
3. Launch and Run an Outreach Campaign.
4. Celebrate and Share Results.

#### **Step One: Apply to be a HeatSmart-CoolSmart Orange Community**

Respond to this Request for Information (“RFI”) to be considered to participate in a HeatSmart-CoolSmart Orange campaign by October 10, 2018. The HeatSmart-CoolSmart Orange Campaign Team will select one HeatSmart-CoolSmart Orange Community (either one city, town, or village, or a coalition of towns / villages). HeatSmart-CoolSmart Orange Campaign Team members who live in communities applying to be part of the HeatSmart-CoolSmart Orange Campaign will not be part of the selection process. ***Communities with active sustainability groups or CAC will be considered favorably.***

#### **Step Two: Prepare for Campaign Launch**

The Core Team of community volunteers will, with the assistance of the HeatSmart-CoolSmart Orange Campaign Team, be responsible for (1) becoming familiar with the offered CH&C technology along with its environmental and financial benefits, and (2) participating in the campaign-planning and implementation process with the HeatSmart-CoolSmart Orange Campaign Team and selected installers.

### **How are installers selected?**

Energize NY will issue a Request for Proposal (“RFP”) for the CH&C installers. The HeatSmart-CoolSmart Orange Campaign Team will collect RFP responses from installers and facilitate a selection process, with support from NYSERDA.

The selected CH&C installers will enter into an agreement with Energize NY. There will be no official, written agreement between the HeatSmart-CoolSmart Orange Community and selected installers.

### **Step Three: Launch and Run Outreach Campaign**

The Core Team of community volunteers will work with the HeatSmart-CoolSmart Orange Campaign Team, including Technical Advisors contracted by NYSERDA, to develop and implement a strategy for collaboration and outreach during the approximately 20-week program. Activities include the following:

- Select and share a date / time / location for a HeatSmart-CoolSmart Orange Launch Event;
- Pre-Launch Meeting facilitated by the HeatSmart-CoolSmart Orange Campaign Team, the Core Team of community volunteers, and selected installers to discuss the launch event and plan the first month of outreach;
- Launch Event– presentation and Q & A to kick off the campaign;
- Outreach aimed at reaching as many homeowners as possible, especially those who may not have considered CH&C before, and encouraging them to learn more and schedule a home assessment;
- Publicize the Program Deadline Date;
- Close-Out Meeting to reflect on the process and consider next steps; and
- Follow-Up Survey of volunteers, leads, and participants to inform future HeatSmart-CoolSmart Orange campaigns.

The HeatSmart-CoolSmart Orange Program is meant to catalyze the installation of residential CH&C in the selected HeatSmart-CoolSmart Orange Community. Any homeowner in the participating community can receive a quote based on the equipment and pricing outlined in the installer’s RFP response. Participants must sign a contract with one of the selected installers by the program deadline in order to participate in the HeatSmart-CoolSmart Orange Pilot Campaign.

Homeowners within the HeatSmart-CoolSmart Orange Community are free to seek bids and work with other installers at any point in the program. This is an important message for the core volunteer team to share. Any installations contracted during the HeatSmart-CoolSmart Orange Program with non-HeatSmart-CoolSmart Orange installers may be celebrated (with permission from the homeowners) but will *not* be counted as progress toward any community incentives established by the selected HeatSmart-CoolSmart Orange installers.

It’s important that the Core Team community volunteers to be prepared to go the distance and maintain a strong outreach presence during the entire campaign. The HeatSmart-CoolSmart Orange Campaign Team will support the Core Team with bi-weekly phone calls to strategize



about potential outreach opportunities, help draft media advisories or press releases and ensure that the community page of the supported online resources has upcoming events, testimonials and other information posted.

#### **Step Four: Celebrate and Share Results**

The HeatSmart-CoolSmart Orange Campaign Team will help the HeatSmart-CoolSmart Orange Community gain well-deserved recognition for their results. After announcing and celebrating their CH&C successes, the HeatSmart-CoolSmart Orange Campaign Team will help the Core Team of community volunteers to identify opportunities to leverage the momentum from the HeatSmart-CoolSmart Orange Campaign efforts to support other sustainability initiatives.

#### **iv. Program Partners and Roles**

##### **Community Roles:**

- **Core Team** – A team of 4-6 community volunteers that serve as the primary organizers and drivers for the HeatSmart-CoolSmart Orange Pilot Campaign. The Core Team can also include community elected officials or staff members.
- **Project Lead** – One of the Core Team members should be selected as the primary contact for the Core Team. His or her contact information may appear in the HeatSmart-CoolSmart Orange Campaign web resources. The Project Lead will also be the main point of contact for the HeatSmart-CoolSmart Orange Campaign Team and the selected installers (though most communication will involve the entire Core Team). The Project Lead can be a community elected official, staff member, or volunteer.
- **Community Volunteers** – Not all volunteers need to serve on the Core Team. **The Core Team is encouraged to recruit additional volunteers (who would not be part of the Core Team) that can assist in the HeatSmart-CoolSmart Orange Campaign with outreach activities.** Some residents will be happy to volunteer to support specific outreach activities such as arranging an article in their church or synagogue newsletter, allowing yard signs to be placed at their home or business, or inviting a speaker to come to group meeting to explain the HeatSmart-CoolSmart Orange Campaign.
- **Municipal Energy Committee Members** – If your community has an energy, sustainability, or similar committee, consider focusing some of its efforts and resources on the HeatSmart-CoolSmart Orange Campaign for the duration of the outreach period.
- **Local Civic Groups** – The Core Team will need to leverage existing networks and groups to get the word out about the HeatSmart-CoolSmart Orange Campaign. Consider inviting representatives from local groups (e.g., PTA, Lions Club, or religious groups) to join the Core Team or to stay in the loop and report to their networks.
- **Individuals with Interest or Expertise in CH&C and Energy Efficiency** – Are there any CH&C energy professionals in your town? These folks may not have a lot of time to spare but might still be interested in helping out.
- **Multiple Communities** – If you are planning to partner with another municipality on HeatSmart-CoolSmart Orange, be sure to include volunteers from both municipalities on the Core Team.

## Installers

The selected installers will offer transparent and competitive pricing, collaborate with community volunteers on outreach and lead tracking throughout the program, and provide HeatSmart-CoolSmart Orange customers with a turnkey inquiry-to-installation process that will make them want to encourage their neighbors to transition to CH&C too.

The following chart outlines specific partner roles and responsibilities:

	<b>HeatSmart-CoolSmart Orange Campaign Team</b>	<b>Core Volunteer Team</b>	<b>Installers</b>
<b>Securing HeatSmart-CoolSmart Orange Partners</b>	<ul style="list-style-type: none"> <li>· Select HeatSmart-CoolSmart Orange communities.</li> <li>· Release RFP to installers; assist / coordinate the installer selection process.</li> <li>· Work with communities to identify strategies for engaging volunteers.</li> </ul>	<ul style="list-style-type: none"> <li>· Seek partnerships with community organizations to help host events and spread the word.</li> <li>· Find hosts for CH&amp;C open houses and other events.</li> </ul>	<ul style="list-style-type: none"> <li>· Submit competitive RFP response.</li> </ul>
<b>Providing Customers with Competitive Pricing</b>	<ul style="list-style-type: none"> <li>· Provide online resources and handouts detailing available incentives and financing options.</li> </ul>	<ul style="list-style-type: none"> <li>· Lead community outreach to help the HeatSmart-CoolSmart Orange campaign promote the competitively priced CH&amp;C solutions offered by selected installers.</li> </ul>	<ul style="list-style-type: none"> <li>· Provide site assessments.</li> <li>· Offer competitive pricing.</li> <li>· Help customers understand and apply for available incentives.</li> <li>· Assist customers in assessing purchase / financing options.</li> </ul>

<p><b>Marketing / Outreach</b></p>	<ul style="list-style-type: none"> <li>· Manage online resources for program information.</li> <li>· Provide planning and outreach. templates for volunteers.</li> <li>· Facilitate initial outreach planning among project partners.</li> <li>· Attend and support key outreach events for homeowners.</li> </ul>	<ul style="list-style-type: none"> <li>· Organize / mobilize community networks and utilize a broad range of tactics to get the word out.</li> <li>· Organize and host outreach events and table at existing community events.</li> <li>· Send regular HeatSmart-CoolSmart Orange updates to community contacts.</li> </ul>	<ul style="list-style-type: none"> <li>· Participate in outreach planning.</li> <li>· Participate in community outreach events.</li> <li>· Supplement community outreach through cost-effective marketing (e.g. banners, mailings, yard signs, etc.).</li> </ul>
<p><b>Education</b></p>	<ul style="list-style-type: none"> <li>· Provide online resources on CH&amp;C and energy efficiency.</li> <li>· Help orient volunteers with basic information about CH&amp;C and energy efficiency.</li> </ul>	<ul style="list-style-type: none"> <li>· Answer community questions about the HeatSmart-CoolSmart Orange Program.</li> <li>· Answer basic CH&amp;C energy questions and direct residents to available resources.</li> </ul>	<ul style="list-style-type: none"> <li>· Give presentations at HeatSmart-CoolSmart Orange events.</li> <li>· Answer technical questions from volunteers / residents.</li> </ul>
<p><b>Web / Media</b></p>	<ul style="list-style-type: none"> <li>· Provide information about the HeatSmart-CoolSmart Orange online.</li> <li>· Communications and media strategy / support.</li> <li>· Manage attention from regional media outlets.</li> </ul>	<ul style="list-style-type: none"> <li>· Assist in providing content (including photos and stories) for HeatSmart-CoolSmart Orange online resources and media outreach.</li> <li>· Encourage and cooperate in local media coverage (print, digital media, and TV).</li> <li>· Submit “letters to the editor” to local newspapers.</li> </ul>	<ul style="list-style-type: none"> <li>· Provide relevant information for the HeatSmart-CoolSmart Orange online resources.</li> <li>· Cooperate with partners to provide content (e.g., photos, stories) and accommodate reporters.</li> </ul>

<b>Leads / Installs</b>	<ul style="list-style-type: none"> <li>· Manage an online form for potential customers to sign up for HeatSmart-CoolSmart Orange site assessments and with automated leads sent to the appropriate installer.</li> </ul>	<ul style="list-style-type: none"> <li>· Participate in occasional outreach to leads as needed.</li> </ul>	<ul style="list-style-type: none"> <li>· Provide excellent customer service through customer inquiries, site assessments, system design, and turnkey installation.</li> </ul>
<b>Administration</b>	<ul style="list-style-type: none"> <li>· Organize bi-weekly check-in calls.</li> </ul>	<ul style="list-style-type: none"> <li>· Participate in bi-weekly check-in calls.</li> </ul>	<ul style="list-style-type: none"> <li>· Participate in bi-weekly check-in calls.</li> </ul>
<b>Tracking</b>	<ul style="list-style-type: none"> <li>· Receive and manage bi-weekly reports from installers.</li> <li>· Track leads generated from web form(s).</li> <li>· Ensure all partners have access to up-to-date contacts.</li> </ul>	<ul style="list-style-type: none"> <li>· Gather and maintain a list of residents who have expressed interest in the program through events.</li> <li>· Track residents who request / receive information about other energy opportunities beyond CH&amp;C.</li> </ul>	<ul style="list-style-type: none"> <li>· Track leads and contracts.</li> <li>· Provide bi-weekly reports to HeatSmart-CoolSmart Orange Campaign Team.</li> </ul>

## B. Timeline

<b>HeatSmart-CoolSmart Orange Timeline (Dates May Vary from Below)</b>	
RFI for Communities: Released	Mon., October 22, 2018
RFI for Communities: Due	Wed., November 16th, 2018 by 5:00 PM
Communities Selected and Applicants Notified.	Tuesday, November 20th 2018
RFP for Installers Issued	November 2018
RFP for Installers: RFP Responses Due	December 2018

Interviews with Installers	January 2019 (TBD)
Installer Selected	Early 2019 (TBD)
The Core Team and Selected Installers meeting facilitated by the HeatSmart-CoolSmart Orange Campaign Team (get to know the Installers and plan the first month of outreach efforts)	Early 2019 (TBD)
HeatSmart-CoolSmart Orange Launch Events	Early 2019
End Date of the HeatSmart-CoolSmart Orange Pilot Campaign	November 2019

## SECTION TWO – Application Process

### **A. Eligible Applicants**

Orange County Cities, Towns or Villages and / or Coalitions of Towns and Villages for which *any* of the following applies (1) are members of Hudson Valley Regional Council, (2) have an active CAC, (3) were an active participant in a Solarize campaign, or (4) have Clean Energy Communities designation.

### **B. Application Deadline**

Responses to this RFI must follow the instructions listed on page one (1) of this RFI to be considered.

### **C. Guidelines for Cities**

The HeatSmart-CoolSmart Orange Program depends on community engagement and will be more successful in communities with strong social networks and community identification. Campaigns will likely have better results if focused on a particular neighborhood (or grouping of neighborhoods) or quadrant. We encourage interested cities, particularly large cities, to consider this approach and to reach out to the HeatSmart-CoolSmart Orange Campaign Team to discuss it.

### **D. Guidelines for Communities Interested in Applying as a Coalition**

Towns or Villages interested in forming a coalition with one or more neighboring Towns or Villages can indicate such interest in their application, with the following considerations in mind:

- No more than three municipalities may apply jointly for this HeatSmart-CoolSmart Orange Pilot Campaign.
- Cities may not join or form coalitions.

## SECTION THREE – Submission Requirements

### A. Submission Requirements

**Letter from chief elected official**, containing the following (if part of a coalition, required of each coalition participant):

- Statement of commitment to the HeatSmart-CoolSmart Orange Program for the duration of the HeatSmart-CoolSmart Orange Pilot Campaign.
- Brief description of how the municipality will support the HeatSmart-CoolSmart Orange Campaign (e.g., communicating via municipal e-mail list, allowing placement of banners, flyers, etc.)
- Articulate why your community is well positioned to take full advantage of the opportunities presented by the HeatSmart-CoolSmart Orange Program.
- Describe your community's commitment to sustainability and CH&C and energy efficiency.
- If your community wishes to enter a coalition with a neighboring municipality, please clearly indicate which municipalities will be partnering.
- Identify a primary program contact (the Project Lead) for the HeatSmart-CoolSmart Orange Pilot Campaign in your community and if part of a coalition, also specify the primary Project Lead for the overall coalition. Include an explanation of this individual's interest and commitment, along with any relevant experience in community outreach.

**Completed Attachment A - Applicant Community Contact and Authorized Signature Form** (if applying with another municipality, one for each municipality):

- Include names of Core Team contacts and information about their background.
- Sign the Authorized Signature Section.

**Completed Attachment B - Community Information Form** (if applying with another municipality, a single form for the combined application – information about all participating municipalities should be included on the form):

- List potential outreach activities in your community to promote the HeatSmart-CoolSmart Orange Program.
- Provide list of partner organizations who will help communicate about the HeatSmart-CoolSmart Orange Program and communication outlets that can be leveraged.

### B. Evaluation Criteria

#### **Community Commitment to Clean Energy and Sustainability**

- Record of or clear articulated interest in expanding CH&C, energy efficiency and renewable energy initiatives in the community, and intent to leverage the HeatSmart-CoolSmart Orange Program in working toward a longer-term goal of promoting community sustainability.
- Success of the Solarize programs in the community. Provide the number of completed projects for the Solarize campaigns.

**Project Leadership**

- Ability of designated Project Lead to champion the HeatSmart-CoolSmart Orange Campaign and commitment of the Core Team. Examples of relevant, successful community projects should be referenced.
- Commitment of elected officials and other key community leaders to promote the HeatSmart-CoolSmart Orange Pilot Campaign.

**Unique Qualities, Resources and Communication Channels**

- Strong community communication channels such as a local paper, digital media, community website, community-wide e-mails, social media and other resources to spread the word about the HeatSmart-CoolSmart Orange Program.
- Ideas and plans for effective outreach and active partnerships within the community.

**Community Heating Fuel Usage**

- Displacing high cost heating fuel (heating oil and propane) results in greater customer savings from CH&C installations. The HeatSmart-CoolSmart Orange Campaign Team will assess heating fuel type used in your community.



### Scoring of Key Criteria

Scoring: low = 1 point, medium = 2 points and high = 3 points.

Criteria marked with an \* are priorities and the points for these attributes are doubled.

Topic	Criteria	Score
Community Commitment to Clean Energy and Sustainability	Record of or clear articulated interest in expanding CH&C, energy efficiency and renewable energy initiatives in the community, and intent to leverage the HeatSmart-CoolSmart Orange Program in working toward a longer-term goal of promoting community sustainability.	
	Success of past Solarize campaign*	
Project Leadership	Ability of designated Project Lead to champion the HeatSmart-CoolSmart Orange Campaign and commitment of the Core Team. *	
	Commitment of elected officials*	
Unique Qualities, Resources, and Communication Channels	Strong community communication channels and identified partners and plans for effective outreach. *	
Community Heating Fuel Usage	Heating fuel type used in your community. * (Data to be provided and analyzed by HeatSmart-CoolSmart Orange Campaign Team)	
<b>TOTAL SCORE</b>		