

LESSONS LEARNED

1. Give yourself time between contractor selection and 1st workshops. **SELECT A CONTRACTOR(S) EARLY.**
 - a. Allow time for marketing, and then do workshops. This will save time in the long run as the community will be better informed and project team will not have to answer as many ‘basic’ questions later on in the process.
 - b. Contractor as great marketing source
 - i. If using one manufacturer for panels, approach them about co-op marketing costs – LiveLight was great lead on this.
2. Possibly build in 1 cent or so per-watt cost to help with admin/marketing/Solar Oregon costs.
3. Lay out detailed process, flow chart, for how assessments are handled with both contractor and ETO
 - a. Bring all to table for this kind of a kickoff meeting
 - b. Start vague with process, and then make detailed step by step of how a person gets from registering to signing the contract. This should have who’s responsibility is whos, what lists are being sent to who, etc.
 - c. Information sharing is CRITICAL
 - d. Project manager should be able to easily identify what residents are at what stage of the process. Requires getting info from contractor assessments and ETO SERs.
 - i. Details to record and make available to PM
 1. Date of registration by homeowner
 2. Date of 1st contact by ETO or Contractor
 3. Date of 1st visit by ETO or Contractor
 4. Result of 1st visit – contact contractor, proposal to be developed, etc.
 5. Proposal delivery date.
 6. Why? Because the PM gets a lot of calls, and if the answer is constantly ‘I don’t know, let me call xxxx’ it looks really bad on the program and you loose residents.
4. Solar Energy Reviews
 - a. Make this process clear in educational workshops!
 - i. Make it clear at workshop that you will not be contacted the next day. High volume = longer response time.
 - b. Make those receiving SERs clear as to next step AFTER assessment
 - i. Develop flyer talking about ‘next step’?
 - c. ETO/CSG to scan in SER sheet after filling it out for Solarize project manager to enter into Solar Oregon database?
 - i. Does contractor really need this info?!! YES – helps them streamline electrical/roof bid scheduling
 - ii. Engage ETO/CSG about how to make this process easiest. Can you somehow tap into their database where they already log the info, instead of having to re-log it? Scan review form and send it to solarize pm?

- d. Decision! How valuable are the SERs? Weigh benefits of having SER and extra time/confusion associated with this step
 - i. If info is shared between entities then value goes up!
- 5. Financing
 - a. Where to begin??
 - b. Get the banks on board early! Invite them to a private banking workshop so they know what to expect from homeowners.
 - c. Is there a special deal they want to offer for the program? Bank of West in Pendleton
- 6. Weatherization-
 - a. Is solar and weatherization too much for households to tackle at once?
- 7. Solar Oregon website:
 - a. No clear area to distinguish between SER review and Contractor Solar Review. There's only the 'Solarize Section' and the 'Install Section.' If ETO fills in solarize after their review, there is nowhere for the contractor to fill in that they have done their review.
 - b. Centralize download and distribution of queue information. One person downloading info, sending it to people it needs to get to. This should/could be PM. Then there isn't the *did they download and contact, who's been contacted, who's been downloaded* questions.
 - c. All in all, not a good system from the back end
- 8. Timeline is critical to keep EXCITEMENT up
 - a. After a few months people loose interest. With a large gap between workshop attendance and call to schedule assessment, many don't return calls.
 - i. Large gap between sign up and receipt of proposal gives people time to commit \$\$ elsewhere.
 - b. Set an ambitious, but realistic timeline. Can make life crazy, but will capitalize on initial excitement of residents.
- 9. Keep people informed! COMMUNICATION
 - a. What to expect after they sign up
 - b. What to expect after their ETO assessment
 - c. What to expect after their contractor assessment
 - d. What to expect after their proposal
 - e. What to expect after their contract is signed and payment made!!!
 - f. Weekly update?
 - i. Compile everything from the week into a weekly update