



**Sustainable Westchester**  
**COMMUNITY REQUEST FOR INFORMATION (“RFI”)**

***EnergySmart Homes Westchester (Previously named HeatSmart Westchester)***  
**2021-1**

Sustainable Westchester invites its members to submit applications to be considered for the next EnergySmart Homes Westchester 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>	
Issue Date	Tuesday, April 13, 2021
Qualified Applicants	Westchester County Cities, Towns or Villages and / or Coalitions of Towns and Villages that are members of Sustainable Westchester. <b><i>Applicants must be located in the area affected by ConEdison’s natural gas moratorium (see Section Two, A).</i></b>
Due Date	Tuesday, June 1, 2021
Submission Instructions	Email application to Lauren Brois at <a href="mailto:Lauren@SustainableWestchester.org">Lauren@SustainableWestchester.org</a> with subject line written as: “EnergySmart Homes Westchester [NAME OF COMMUNITY] RFI.” 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:Lauren@SustainableWestchester.org">Lauren@SustainableWestchester.org</a> or 914-242-4725, ext. 122 We welcome the opportunity to answer questions and assist with your submission.

## Table of Contents

<b>Program Summary</b>	<b>3</b>
<b>Section One: Opportunity Summary</b>	<b>4</b>
A) Program Goals and Overview	
B) Program Partners and Roles	
C) Timeline	
<b>Section Two: Application Process</b>	<b>12</b>
A) Eligible Applicants	
B) Application Deadline	
C) Guidelines for Communities Applying as a Coalition	
<b>Section Three: Submission Requirements</b>	<b>14</b>
A) Submission Requirements	
B) Evaluation Criteria	
<b>Attachment A: Community Application Form</b>	
<b>Attachment B: Community Profile Form</b>	

## Program Summary

Sustainable Westchester, a leading inter-municipal organization delivering innovative sustainability aggregation programs to its forty-four municipal members, has assembled a team of clean energy experts and implementation partners for the EnergySmart Homes Westchester Program. Through the EnergySmart Homes Westchester Program (ESH), Sustainable Westchester 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. They may also provide access to complementary clean energy solutions including community solar.

Heating and cooling energy expenditures are responsible for one third of the carbon emissions in Westchester and New York State. The options offered to homeowners in ESH Westchester, 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.

Sustainable Westchester requests submissions from a Westchester 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 next EnergySmart Homes Westchester Campaign, scheduled to launch in late summer 2021.

Once the EnergySmart Homes Westchester Community (either one city, town, or village, or a coalition of towns and / or villages) is selected, Sustainable Westchester 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 EnergySmart Homes Westchester Community and selected installers, with support from Sustainable Westchester, will develop and implement an approximately 28-week community outreach campaign beginning in August 2020, with the goal of dramatically increasing the number of existing CH&C installations in the EnergySmart Homes Westchester Community.

**A successful EnergySmart Homes Westchester 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 EnergySmart Homes Westchester. Successful 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 EnergySmart Homes Westchester is to significantly ramp up the rate of CH&C system adoption and energy efficiency in Westchester, by creating and servicing a demand for clean energy options in home heating and cooling.** ESH Westchester 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 ESH Westchester should also consider how they might leverage the CH&C outreach to further other local clean energy efforts.

**The success of the Solarize Program, Energize Program, and similar programs inspired the HeatSmart Program, now renamed as EnergySmart Homes Program.** The first HeatSmart Westchester campaigns in Bedford, Pound Ridge, Lewisboro, Dobbs Ferry and Hastings were offered from early March of 2019 to April 2020. Over the 13 months, the campaigns resulted in 36 installations of energy efficiency upgrades and clean heating and cooling equipment. Currently, community campaigns are in progress in Ossining, Briarcliff and Pelham. The current campaigns have generated over 600 leads over four months. For examples of other community-based CH&C programs, see the HeatSmartTompkins program in Tompkins County, NY and HeatSmart Mass in various communities within Massachusetts.

## **SECTION ONE – Detailed Opportunity Summary**

### **A. Program Goals and Overview**

#### **i. Program Goals**

EnergySmart Homes Westchester 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 EnergySmart Homes Westchester Program to be replicated in other regions of New York State. EnergySmart Homes Westchester 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 EnergySmart Homes Westchester Program;
- C. Provide education and outreach about benefits of CH&C technology to support the continued increase in adoption of CH&C throughout Westchester in a way that can be sustained beyond the timeframe of the EnergySmart Homes Westchester campaigns.

EnergySmart Homes Westchester will promote two prime heating and cooling technologies, as well as energy efficient building envelope improvements and heat pump water heaters, as detailed below:

1. **Cold-Climate Air Source Heat Pump systems** (as defined by the Northeast Energy Efficiency Partnership, NEEP), 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).
3. **Building Envelope Improvements:** NYSERDA Programs (including Comfort Home and Empower) will address air sealing, insulation, and upgraded heating mechanicals through a comprehensive home energy assessment done by a 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 taken into account so that the CH&C technology is appropriately sized.
4. **Heat Pump Water Heaters:** Water heating is typically the second-largest energy expense in a home; it can cost the average household approximately \$400–\$600 each year. Heat pump water heaters are up to three times more energy efficient than conventional electric resistance water heaters since they use electricity to move heat from one place to another instead of generating heat directly. Properly maintaining a water heater and choosing high-efficiency equipment can help homeowners save energy, improve the comfort of their homes, and contribute to a cleaner environment.

## **ii. Barriers EnergySmart Homes Westchester is Designed to Overcome**

The EnergySmart Homes Westchester 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 EnergySmart Homes Westchester 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. EnergySmart Homes Westchester provides several

easy starting points: check out the online resources, come to an event or webinar, 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 EnergySmart Homes Westchester Campaign. Within each community, a “Core Team” of dedicated community volunteers champions the program.
- EnergySmart Homes Westchester 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).
- EnergySmart Homes Westchester is designed to be as transparent as possible with all relevant information, including detailed campaign information, available through the Sustainable Westchester website.

### **C) Cost**

- EnergySmart Homes Westchester 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 EnergySmart Homes Westchester installers to offer competitive pricing for quality installations. Through the EnergySmart Homes Westchester 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 EnergySmart Homes Westchester online resources.

### **E) Other**

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

### **iii. EnergySmart Homes Westchester Campaign Process:**

In this EnergySmart Homes Westchester Campaign, the EnergySmart Homes Westchester Core Team of community volunteers will follow a four-step process:

1. Apply to be a EnergySmart Homes Westchester Community
2. Prepare for Campaign Launch

3. Launch and Run an Outreach Campaign
4. Celebrate and Share Results

### **Step One: Apply to be a EnergySmart Homes Westchester Community**

Respond to this Request for Information (“RFI”) to be considered to participate in a EnergySmart Homes Westchester campaign. Sustainable Westchester will select one EnergySmart Homes Westchester Community (either one city, town, or village, or a coalition of towns / villages). EnergySmart Homes Westchester Campaign Team members who live in communities applying to be part of the EnergySmart Homes Westchester Campaign will not be part of the selection process. ***A threshold requirement for all communities or coalitions of communities applicants is that they must be located in the area affected by ConEdison’s natural gas moratorium. Preference will be given to communities or coalitions of communities who have been previously involved in EITHER (1) a Solarize campaign, OR (2) an Energize campaign, OR (3) have demonstrated a successful sustainability-focused campaign.***

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

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

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

Sustainable Westchester will issue a Request for Proposal (“RFP”) for the CH&C installers. Sustainable Westchester will collect RFP responses from installers and facilitate a selection process, with participation by the selected community and with significant support from NYSERDA.

The selected CH&C installers will enter into an agreement with Sustainable Westchester.  
There will be no official, written agreement between the EnergySmart Homes Westchester Community and selected installers.

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

The Core Team of community volunteers will work with Sustainable Westchester and the Technical Advisors contracted by NYSERDA, to develop and implement a strategy for collaboration and outreach during the approximately 28-week program. Activities include the following:

- Select and share a date / time / location (in person or on the web) for a EnergySmart Homes Westchester Launch Event;
- Pre-Launch Meeting facilitated by Sustainable Westchester, 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 EnergySmart Homes Westchester campaigns.

The EnergySmart Homes Westchester Program is meant to catalyze the installation of residential CH&C in the selected EnergySmart Homes Westchester 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 EnergySmart Homes Westchester Campaign.

Homeowners within the EnergySmart Homes Westchester 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.

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. Sustainable Westchester 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**

Sustainable Westchester will help the EnergySmart Homes Westchester Community gain well-deserved recognition for their results. After announcing and celebrating their CH&C successes, Sustainable Westchester will help the Core Team of community volunteers to identify opportunities to leverage the momentum from the EnergySmart Homes Westchester 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 EnergySmart Homes Westchester 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 EnergySmart Homes Westchester Campaign web resources. The Project Lead will also be the main point of contact for the EnergySmart Homes Westchester 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 EnergySmart Homes Westchester 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 EnergySmart Homes Westchester 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 EnergySmart Homes Westchester 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 EnergySmart Homes Westchester 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 EnergySmart Homes Westchester, 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 EnergySmart Homes Westchester customers with a turnkey inquiry-to-installation process that will make them want to encourage their neighbors to transition to CH&C too. Included in the RFP that Installers respond to will be the requirement that selected Installers pay a success fee for installations completed to create a sustainable EnergySmart Homes Westchester program, in the same way that Solarize installers did in 2017 and 2018. .

**The following chart outlines specific partner roles and responsibilities:**

	<b>Sustainable Westchester</b>	<b>Core Team</b>	<b>Installers</b>
<b>Securing EnergySmart Homes Westchester Partners</b>	<ul style="list-style-type: none"> <li>● Select EnergySmart Homes Westchester communities.</li> <li>● Release RFP to installers; assist / coordinate the installer selection process.</li> </ul>	<ul style="list-style-type: none"> <li>● Seek partnerships with community organizations to help host events and spread the word.</li> </ul>	<ul style="list-style-type: none"> <li>● Submit a competitive RFP response.</li> </ul>

	<ul style="list-style-type: none"> <li>• Work with communities to identify strategies for engaging volunteers.</li> </ul>	<ul style="list-style-type: none"> <li>• Find hosts for CH&amp;C open houses and other events.</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 EnergySmart Homes Westchester 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>
<b>Marketing / Outreach</b>	<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 EnergySmart Homes Westchester 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>
<b>Education</b>	<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 EnergySmart Homes Westchester 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 EnergySmart Homes Westchester events.</li> <li>• Answer technical questions from volunteers / residents.</li> </ul>

<b>Web / Media</b>	<ul style="list-style-type: none"> <li>● Provide information about the EnergySmart Homes Westchester 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 EnergySmart Homes Westchester 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 EnergySmart Homes Westchester 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 EnergySmart Homes Westchester 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 Sustainable Westchester.</li> </ul>

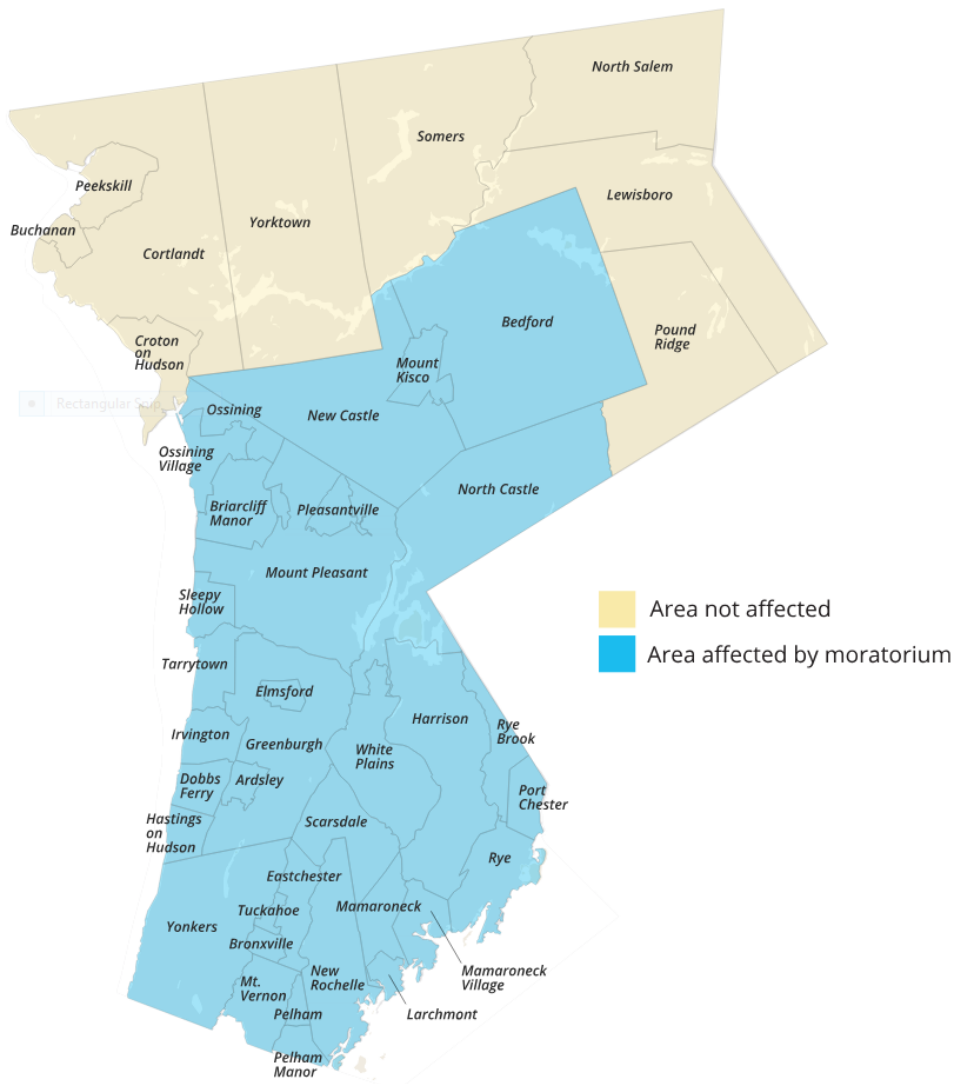
## B. Projected Timeline

<b>EnergySmart Homes Westchester Timeline (Dates Are Likely to Vary From Below)</b>	
RFI for Communities: Released	Tuesday, April 13, 2021
RFI for Communities: Due	Tuesday, June 1, 2021
Communities Selected and Applicants Notified.	Friday, June 4, 2021
RFP for Installers Re-Issued	April 2021
RFP for Installers: RFP Responses Due	Monday, June 7, 2021
Interviews with Installers	Week of June 14, 2021
Installer Selected	Early July
The Core Team and Selected Installers meeting facilitated by the EnergySmart Homes Westchester Campaign Team (get to know the Installers and plan the first month of outreach efforts)	Early July
EnergySmart Homes Westchester Launch Events	Early August
End Date of the EnergySmart Homes Westchester Campaign	March 2022

## SECTION TWO – Application Process

### A. Eligible Applicants

***A threshold requirement for applicants in this EnergySmart Homes Westchester Campaign is that they must have been previously involved in EITHER (1) a Solarize campaign, OR (2) an Energize campaign OR (3) have demonstrated a successful sustainability-focused campaign. Applicants must be located in the area affected by ConEdison’s natural gas moratorium (see map below) or partner with a community located within ConEdison’s natural gas moratorium.***



**B. Application Deadline**

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

**C. Guidelines for Cities**

The EnergySmart Homes Westchester 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 the EnergySmart Homes Westchester 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 EnergySmart Homes Westchester Campaign.
- Cities may not join or form coalitions.

## SECTION THREE – Submission Requirements

### A. Submission Requirements

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

- Statement of commitment to the EnergySmart Homes Westchester Program for the duration of the EnergySmart Homes Westchester Campaign.
- Brief description of how the municipality will support the EnergySmart Homes Westchester 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 EnergySmart Homes Westchester Program.
- Describe your community's commitment to sustainability and CH&C and energy efficiency.
- If your community wishes to enter into a coalition with a neighboring municipality, please clearly indicate which municipalities will be partnering.
- Identify a primary program contact (the Project Lead) for the EnergySmart Homes Westchester 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, a single form for the combined application – information about all participating municipalities should be included on the form):

- 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 EnergySmart Homes Westchester Program.
- Provide list of partner organizations who will help communicate about the EnergySmart Homes Westchester 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 EnergySmart Homes Westchester Program in working toward a longer-term goal of promoting community sustainability.
- Success of the Solarize and Energize programs in the community. Provide the number of completed projects for both the Solarize and Energize campaigns. Alternatively, a description of another sustainability-focused campaign and summary of results can also be considered.

### **Project Leadership**

- Ability of designated Project Lead to champion the EnergySmart Homes Westchester Campaign and commitment of the Core Team. Examples of relevant, successful community projects should be referenced.
- Viable plan to manage the Core Team, along with the delegation of the various tasks and responsibilities. Be clear as to what team members will take leadership over specific aspects of the EnergySmart Homes Westchester Campaign (managing Core Team duties and members, performing outreach, connecting with community networks and other resources, etc.).
- Commitment of elected officials and other key community leaders to promote the EnergySmart Homes Westchester Campaign.

### **Unique Qualities, Resources and Communication Channels**

- Strong community communication channels such as a local paper, digital media, community website, community-wide emails, social media and other resources to spread the word about the EnergySmart Homes Westchester Program.
- Ideas and plans for effective outreach and active partnerships within the community.

### **Building and Demographic Factors**

- The EnergySmart Homes Westchester Campaign Team will assess the following building and demographic factors in the community to more accurately gauge the demand for CH&C / energy efficiency and potential success of a EnergySmart Homes Westchester Campaign in your specific community:
  - a. Heating fuel type used in your community – displacing high cost heating fuel (heating oil and propane) results in greater customer savings from CH&C installations
  - b. Percentage of single-family and owner-occupied homes.
  - c. Existing technology deployment (e.g. ASHP, GSHP, weatherization through Home Performance with ENERGY STAR, electric vehicles, solar installations).

**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 EnergySmart Homes Westchester Program in working toward a longer-term goal of promoting community sustainability.	
	Success of past Solarize and or Energize campaign(s) or other successful sustainability-focused campaigns. *	
Project Leadership	Ability of designated Project Lead to champion the EnergySmart Homes Westchester Campaign. Commitment of the Core Team. Viable plan to manage the Core Team, along with the delegation of the various tasks and responsibilities. *	
	Commitment of elected officials. *	
Unique Qualities, Resources, and Communication Channels	Strong community communication channels and identified partners and plans for effective outreach.*	
Building and Demographic Factors	Assessment of building and demographic factors.* (Data to be obtained and analyzed by EnergySmart Homes Westchester Campaign Team)	
<b>TOTAL SCORE</b>		