

From: Jeremiah P. LeRoy <Jeremiah.LeRoy@buncombecounty.org>
Subject: Fwd: Solar Crowdsourcing Proposal
To: Jackie Hamstead <Jackie.Hamstead@buncombecounty.org>; Bridget Herring <bherring@ashevillenc.gov>; Kiera Bulan <kbulan@ashevillenc.gov>
Sent: July 21, 2023 1:50 PM (UTC-04:00)
Attached: image001.png, Solar CrowdSource draft scope of work updated 7-21-2023.xlsx

Jeremiah LeRoy
Sustainability Officer

Begin forwarded message:

From: Don Moreland <don@solarcrowdsourcing.com>
Date: July 21, 2023 at 12:47:01 PM EDT
To: Sophie Mullinax <sophie@solarcrowdsourcing.com>
Cc: "Jeremiah P. LeRoy" <Jeremiah.LeRoy@buncombecounty.org>, Ken Haldin <ken@solarcrowdsourcing.com>
Subject: Re: Solar Crowdsourcing Proposal

Hey Jeremiah,

Sending this updated draft scope of work, attached. We had too much money in there. Let's please use this one for our meeting this afternoon.

Thanks,
Don

Don Moreland
Founder, Solar Crowdsourcing



www.solarcrowdsourcing.com

On Tue, Jul 18, 2023 at 8:03 PM Sophie Mullinax <sophie@solarcrowdsourcing.com> wrote:
Hi Jeremiah,

Attached is our adjusted scope of work. Please note that we put in a draft timeline in column F, reallocated some funding, and added more descriptions of work. We look forward to discussing everything with you, Jackie, Kiera, and Bridget on Friday at 3 p.m. We remain open and receptive to feedback and changes. We want to get this as accurate as possible with the understanding that some work, timelines, and dollar amounts may need to shift as the scope of work gets underway.

Thank you again for this opportunity. We are excited to partner with Buncombe County and the City of Asheville on this important work!

Best regards,
Sophie

On Wed, Jul 5, 2023 at 10:57 AM Sophie Mullinax <sophie@solarcrowdsource.com> wrote:
Hi Jeremiah,

This is all so very exciting. Thank you for the opportunity. We are available to meet with Adrian to talk about synergies and contractors whenever you are available.

Thanks,
Sophie

On Fri, Jun 30, 2023 at 10:05 AM Jeremiah P. LeRoy
<Jeremiah.LeRoy@buncombecounty.org> wrote:

Thanks Don. We're excited about this collaboration as well. I'll be out of the office next week, but Kiera and Jackie will be working on developing a scope of work and contract deliverables to run past you all so we can get the contract executed as soon as possible and get rolling.

I did want to keep you up to speed with some recent conversations that will be important to this work. I had a meeting earlier this week with Duke Energy's residential trade ally manager, Adrian Vermeire, and a few other key staff. It made sense to me to reach out to Duke on this because they already have existing relationships with HVAC contractors in our area that have been trained on utility incentives/rebates that could potentially be layered in with any IRA credits or rebates. He was very helpful and already has a few specific contractors that he thinks we can reach out to. They also mentioned that they would be interested in assisting with marketing the program when the time comes. It remains to be seen if they will follow through, but this type of program is in their self-interest as well so I'm cautiously optimistic. I think a meeting with Adrian in the coming weeks might be helpful. He may have some additional insight into the development of an RFI as well contractor contact info.

On Wednesday I met with Jenn Weiss and Melissa Malkin-Weber, of the NC Clean Energy Fund (Green Bank). Now that we have officially passed our budget for FY24 we have the \$100K dedicated to start a loan loss reserve that is intended to develop a financing mechanism for clean energy projects for Buncombe County. It will take some time to get all the details ironed out. They are meeting with CDFIs and traditional lenders to determine which entity might be interested in working with them to create such a product. They are also working with a few software product manufacturers that license the systems that we would potentially use to enroll contractors and provide the loan product (one we have been focused on is the [Smart-E platform](#)) but we're not locking ourselves into that just yet since they want to do their due diligence on others as well. Adrian mentioned specifically that several contractors he works with have asked about the utility providing a financing product. It was welcomed news to hear that this is a specific need and may help

fill a gap and garner interest in the program as a whole. Again...lots more to do so we'll see how it all shakes out.

Ultimately, in the next two weeks or so I'd like to get a meeting on the books with all of us, City/County/SCS/Duke/NCCEF, so we can start to game plan and determine next steps and roles and responsibilities.

Sorry – long email but all good stuff. Hope y'all have a great 4th of July holiday. I'll be in touch soon.

J

Jeremiah LeRoy

he/his

Sustainability Officer

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From: Don Moreland <don@solarcrowdsource.com>

Sent: Thursday, June 29, 2023 4:47 PM

To: Jeremiah P. LeRoy <Jeremiah.LeRoy@buncombecounty.org>

Cc: Sophie Mullinax <sophie@solarcrowdsource.com>; Ken Haldin <ken@solarcrowdsource.com>; Ron Venturella <Ron.Venturella@buncombecounty.org>; Jackie Hamstead <Jackie.Hamstead@buncombecounty.org>; Kiera Bulan

<kbulan@ashevillenc.gov>; Bridget Herring (bherring@ashevillenc.gov)
<bherring@ashevillenc.gov>

Subject: Re: Solar Crowdsourcing Proposal

Jeremiah,

On behalf of the Solar Crowdsourcing team, I am pleased to inform you that we remain immensely interested and are extremely grateful to the city and county for the opportunity. Asheville and Buncombe County continue to push the envelope in sustainability and equity and we could not be more excited to be part of that effort.

We look forward to next steps to finalize the scope, budget and contract and begin this important work.

Gratefully yours,

Don Moreland

Founder, Solar Crowdsourcing



www.solarcrowdsourcing.com

On Thu, Jun 29, 2023 at 3:34 PM Jeremiah P. LeRoy
<Jeremiah.LeRoy@buncombecounty.org> wrote:

Don,

Thank you for the proposal that Solar Crowdsourcing submitted to Buncombe County regarding the RFP for various services supporting the Blue Horizons Project. This message is to inform you that the City and County have reviewed and scored all proposals received and that we intend to award Solar Crowdsourcing for the services outlined in your proposal. If your organization remains interested, the final scope of work and budget will be determined during upcoming contract negotiations. Thank you

again for your interest in working with both the City and the County on these important efforts. We will be in touch in the coming days to discuss next steps.

Please don't hesitate to reach out should you have any question or concerns.

Sincerely,

Jeremiah LeRoy

he/his

Sustainability Officer

[<image001.png>](#)

[\(828\) 250-4976](#)

200 College St., Asheville, NC 28801

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Sophie Mullinax

C: 828.713.7318



www.solarcrowdsource.com

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Sophie Mullinax

C: 828.713.7318



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Electrify Program Scope of work								
Program Area		proposed \$	Scope of Work	Draft Deliverables	Draft Deliverables Timeline	Questions/Description		
Develop and Implement RFI process for local contractors	\$5,000	\$2,000	Design methodology to survey local commercial and residential electrical, HVAC and energy efficiency contractors to discover where gaps exist in the industry and what training or support is required to implement a electrify pilot program or other future electrification campaigns.	target # of participants = 5-7 contractors	July-Sept 2023			
		\$1,500	Develop and implement a marketing plan to encourage broad participation and equitable inclusion in the RFI. Leverage existing networks/ partnerships.	track number of meetings and events with contractors. Track number of WBE and MBE businesses engaged with and participating in RFI	July - Sept 2023	Together with existing networks/partnerships, marketing plan to include collaborating with local trade/business associations and unions, meeting with contractors 1 on 1 in-person or virtually, and hosting events such as a lunch & learn.		
		\$1,500	Produce report summarizing the finding of the RFI including: Existing contractor networks, what support services contractors would need to participate in an electrify program, the scope and size of the local contractor industry, available technologies/ manufacturers used, level of expertise on energy efficiency and financial incentive resources.	Report to include number of contractors, technologies deployed, market conditions, and financing available. Report to identify any gaps needed to fulfil electrify program	Oct/Nov 2023			
Contractor Outreach, Education, and Network Development	\$7,500	\$1,500	Develop or strengthen existing local contractor networks for the electrify pilot program and future initiatives.	Produce contractor-facing abridged RFI report as a feedback loop to contractors. Identify contractors interested in exploring new technologies, training opportunities, and interest in participating in electrify program	Oct - Dec 2023	Reduced to \$1500 from original \$5k		
		\$6,000	Based on the findings of the RFI, recruit subject area experts to facilitate targeted contractor training on electric heat pump technologies and financial incentive opportunities.	# of trainings and/or target # of participating contractors	Oct/Nov 2023	3+/- training sessions for ~\$2,000 each.		
Consumer Outreach and Education	\$19,500	\$2,500	Assemble steering coalition including City and County staff, representation from BHPCC, NC Clean Energy Fund, Duke Trade Allies Program, GBA, and other CBOs for collaboration on program development, implementation and client referrals.	# of planning meetings, # of client referrals, program plan/ timeline	Q4 2023			
		\$3,000	Educate residents about the climate impacts, health benefits, and cost-saving potential of energy efficient technologies (particularly heat pumps). Provide locally-relevant content via info sessions and workshops, events, and print and web-based materials to meet residents where they are.	# of events and # of participants at events	Develop content in Oct - Dec 2023. Public-facing during first half of 2024.	How to best coordinate with GBA/BHPCC? Resources gained from Greenlink study and Rewiring America will help source education materials.		
		\$4,000	Design and implement interactive webpage to promote campaign. Integrate marketplace features as they evolve.	webpage and resources available therein	Visibility in Jan - March 2024			
		\$10,000	Develop free online tool that includes a questionnaire/survey for citizens to establish baseline energy efficiency and electrification ratings. After completing questionnaire/survey, citizens will get a result that shows score or rating. Users will then be presented with a road map of how to achieve increased energy efficiency and 100% electrification score or rating.	Survey questions, and interactive online tool.	Develop in Oct - Dec 2023	This will be available as part of the customer dashboard within the marketplace		
Development of Contractor Consumer Marketplace & Heat Pump Pilot Program Implementation	\$34,500	\$11,000	Develop marketplace, i.e., an interactive platform to streamline access to information (vetted contractors list, IRA incentives, clean tech, service options) and connect contractors with residents.	regular reporting on progress of marketplace development; marketplace development schedule is TBD	Develop and platform user-testing in late 2023-early 2024. Public promotion and participation in spring 2024.			
		\$5,000	Supply-side development: vet and begin onboarding participating contractors and energy efficiency technologies for the marketplace and pilot program. Consult with technical experts as needed.	# of training sessions with contractors, list of contractor requirements/criteria, notes from contractor reference checks	Fall 2023 and ongoing	How can SCS collaborate with BHPCC tech committee on this?		
		\$2,500	Incentivize contractor participation and create ongoing value proposition by offering continuing trainings/ certifications, reducing marketing costs and pre qualifying customers.	Designate certifications to offer, target # of marketing materials, target # of prequalified customers.	Spring 2024 and ongoing.	Some of this work is covered under different line items but this could serve as flex spending to incentivize participation.		
		\$5,000	Demand-side development: develop public-facing marketing and outreach materials to message value proposition and encourage marketplace participation.	marketing and outreach materials, i.e., brochures, signs, white papers, advertising campaigns, explainer videos, etc.	Fall/winter 2023 and ongoing.			
		\$4,000	technologies and integrate any processes, procedures, or technology needed with their financing platform. Coordinate with energy office and implement any processes	to onboard to marketplace. Report on coordination with energy office and efforts to target # of evaluations. Maybe move to heat	Fall/winter 2023 and as resources become available.			
		\$7,000	Explore opportunities with gov and industry partners to provide free, no-obligation evaluation for LMI residents	target # of evaluations. Maybe move to heat pump pilot program section.	Fall/winter 2023	Pros. I was thinking this big event would be after we launch the program. Or maybe it's part of the launch event.		
		\$7,000	Designed to excite and inform citizens about the vision and specific applications for electrifying everything in their homes and properties. Co-host event with other local	resulting from the event, target # of	critical mass achieved and promotional lead			
General Contract Admin	\$4,500	\$1,000	Prepare quarterly invoices including support documentation.					
		\$1,500	Provide quarterly reports with metrics and evaluation of program to date.					
		\$2,000	Organize best practices and lessons learned to share with other local governments seeking to replicate similar electrification campaigns	target # of communications, create roadmap				
Draft total	\$78,000							