



## 2014 Oregon Green and Solar Tour Suggestions, Tips, & Resources

### Key steps to a successful tour:

#### 1. Set the date and time:

- While many tours across the country coincide with the American Solar Energy Society's (ASES) 19<sup>th</sup> annual National Solar Tour on October 4-5, 2014, the Oregon Green and Solar Tours may be scheduled any time in September or October.
- Most commonly, tours are held on Saturday morning and afternoons to maximized tour attendance.

#### 2. Decide on the type of tour:

- **Guided versus Self-guided:** With guided tours all attendees travel is via bus or vans. This is easier on homeowners since the group shows up all at once, other green & solar homes not on the tour can be viewed, and attendees can be educated while traveling between sites. Downside is you must collect enough from tickets to pay for the buses. In the past, the Eugene tour has been able to get donated buses from the university, and in have also networked with senior community organizations for bus donations in the past.
- **Self-guided tours** take place over a set a span of time. People are given/purchase maps or map tickets, they pick the homes they want to visit, and drive there themselves. This means the tour hosts must be prepared for people dropping in throughout the 4 to 6 hours that the tours might be "open". This format is great for attendees by providing them with the freedom to choose the tours to visit, and it results in less coordination for Local Tour Coordinators since there are no transportation issues. The downside for homeowners is an exhausting day and a well tramped house. With Portland's Build It Green Tour most of the profits for ticket sales go towards cleaning certificates for homeowners, and a homeowner/volunteer party afterwards. The downside for the environment is



that there are many cars on the road driving to and from the same destinations.

- **Single starting point tours** start from a single starting location where there is often an orientation lecture or a fair. Lectures can be scheduled once or several times a day. Buses for guided tours can depart from that point or maps can be given/sold to people to drive there on their own. Tickets can be sold from that point. This is the easiest type of tour to organize. Eugene has successfully used this format for several years.
- **Self-Guided Tours with Map Tickets** are drive-there- yourself tours. Participants purchase or are given map tickets or handouts with directions and site information, and asked to drive there themselves on a specific day only. You must consider site parking constraints in setting your maximum number of tickets. You will not be able to set the order that people visit homes or the timing. This type has worked well in Portland (25 homes, 1,300 maximum limit on tickets and usually only about 300 maximum attendance at any one site). Establishing successful ticket purchase locations and selling tickets is one of the more difficult issues for a group starting out. Portland's Office of Sustainable Development has been able to sell tickets online and at local retail sites supported by very good advertising and media coverage.
- **Self-Guided Tours with Published Addresses** are tours where the addresses and information are widely published, and people are asked to show up and either purchase a ticket or attend a tour for free. This has worked well in Bend (2 days of tours, 20+ homes) but may not be acceptable to some homeowners. This requires having volunteers situated at each home to sell tickets on site.

### 3. Solicit homes to be on the tour. Start early!

- This is usually done by sending out press releases to local media and nonprofit organizations. Or just call architects, designers, solar installers, and builders. The Oregon Department of Energy and the Energy Trust may also be able to help you find sites through their lists of projects receiving incentives.
- However, local tour sites can be added right up until the point in which maps and tour route materials are printed.
- How many homes does a tour need? A good tour can be made with only 4 to 6 sites. In fact, if the sites are really exemplary, or well known, a tour can be successful with only 2-3 sites. People are most interested in touring homes, but schools, commercial and multifamily projects can also be on the tours.



#### **4. Create a tour guide**

*A very simple guide may just include the following:*

- Date and time of tour and contact number for more information
- If it's a guided tour - where to meet and when.
- If it's a self-directed tour - addresses and directions to each home. Think about including parking instructions too.
- If appropriate, how to buy tickets and how much they cost.

*A more elaborate guide would include the above information and:*

- A photo of each home.
- A description of the solar and green building features of each home.
- A list of the solar installer, architect/designer, and contractors.

#### **5. Let the media know**

- The success of the tour can sink or swim on how well you can get the word out!!!
- Post logistical info about your tour on your 2014 Oregon Green and Solar Tour web portal at: <http://solaroregon.org/workshops-and-education/tours/2014-oregon-green-and-solar-tours> or email relevant information to the [Josh@solaroregon.org](mailto:Josh@solaroregon.org) for posting.
- ASES (American Solar Energy Society) also has a diversity PR, media, public service announcement templates at the National Tour website [www.nationalsolartour.org](http://www.nationalsolartour.org).

#### **6. Sell the tickets / Get the word out**

- Allow your team 5-8 weeks to spend on the publicity and sales.
- This really is the most critical portion of the tour planning, and often is shorted in time and attention.
- If you are selling tickets, and not using a single start location, you will also need to coordinate ticket sale locations.
- Media coverage: One great front page newspaper article and photo will make all the difference in the world on your ticket sales or tour attendance.

#### **7. Homeowner Support**

- Collect volunteers. For self-guided tours. It is nice to have 1-2 volunteers at each site to help out the owner/ designer/ contractor. This is a critical component for



self-guided tours, so you should begin organizing volunteers as early as possible. Fewer volunteers are needed on guided bus tours.

- Sample time-line for a mid-October tour:
  - Early September – Prepare handout materials.
  - Mid-September – Orientation party for homeowners and volunteers (drawing for a professional house cleaning gift certificate has been a nice addition in some tours).
  - Mid-September – Training for site volunteers. It is more important that they know how to handle visitors, sell tickets and support the homeowners than that they have extensive knowledge of the green and solar features. It is perfectly OK for a volunteer to say “I don’t know, but you can ask the homeowner or on-site professional.”
- Organize signage. You may need on street signage to help lead people to the site. Individual tours may also want signage to point out and explain green and solar features.
- Print handouts and distribute site information.

## **8. Post Tour Follow Up**

- Party (volunteers, advertisers, homeowners). This can be a highly effective educational event but it takes a lot of additional work. You should find a way to celebrate the success of the day!
- Evaluation forms to fair vendors/ homeowners.
- Thank you notes to fair vendors, homeowners and volunteers.
- Report the successes, challenges and future plans to vendors, sponsors and 2014 Oregon Green and Solar Tour Coordinator.

## **Other Possible Tasks / Strategies**

- Business Sponsorships: Get this done as early as possible so your promotional materials can highlight their involvement.
- Specialty Tours: Once you have your group of committed solar home owners, you may be able to do even more with only a little bit more effort.
- School Pre-tour: Choose 1 or 2 of the projects to be open for a tour during the week by a class from a local school. You may need to help find support for transportation. Start coordinating this effort in the spring before school closes



for the summer.

- Builders/ Designers / Business Pre-tour: Organize a separate tour during the week for other members of the community. Contact a professional organization to see if they have a group that might be interested in a special tour.
- Politicians / Media Tour: You may want to organize a special tour to educate politicians on what's possible in their communities.
- Collaboration with Other Events You can often leverage the impact of your tour and your sales efforts by holding it in conjunction with other pre-existing events:
  - Green Building/Renewable Energy Fairs
  - Local events such as Fall Festivals or Crafts Shows
  - Home Shows
  - Garden Shows

## **Other Resources Other Assistance for Tour Organizers:**

- 2014 Oregon Green and Solar Tour Portal: <http://solaroregon.org/workshops-and-education/tours/2014-oregon-green-and-solar-tours>.
- If you would like to create a tour profile on the Solar Oregon's 2014 Oregon Green and Solar Tour Portal, please contact Solar Oregon Program Manager, Joshua Baker at [josh@solaroregon.org](mailto:josh@solaroregon.org).
- Solar Oregon has a number of useful resources at the Oregon Green and Solar Tour Resources Page (<http://solaroregon.org/workshops-and-education/tours/green-and-solar-tour-resources>), such as:
  - Tour Suggestions, Tips And Resources (this document)
  - Oregon Green & Solar Tours Web Logo
  - Oregon Green & Solar Tours Print Logo
  - Oregon Green & Solar Tours Print (PDF Version)
  - Oregon Green & Solar Tours Poster (Publisher Version)
  - Past tour reports