

SOLAR ORGANIZING PLAYBOOK

A campaign toolkit for homeowners' associations residents who
to reduce barriers to rooftop solar in their neighborhood.



Confront polluters. Seed solutions.



**A STEP-BY-STEP
CAMPAIGN GUIDE TO
REDUCING BARRIERS TO
ROOFTOP SOLAR**

NORTH CAROLINA

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Written by: Joyce Fang of Community Action Works

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About Our Organizations



Confront polluters. Seed solutions.

At **Community Action Works**, we believe that environmental threats are big, but the power of well-organized community groups is bigger. That's why we work side by side with everyday people to train them to become leaders fighting for environmental protection. Reach out at info@communityactionworks.org to get connected with our team of Community Organizers who can provide one-on-one support.



Environment North Carolina Research & Policy Center has one mission that drives everything we do: to protect our natural world. We conduct research that helps us and others understand the problems we need to solve. We provide education for people like you and the decision-makers who shape our nation's future. And we're advancing policies and practices that put our country, and the planet, on a better path. Get connected to learn about latest news and campaign updates, and find our most recent resources, tips and guides at environmentamerica.org/northcarolina

Community Action Works and Environment North Carolina Research & Policy Center are part of The Public Interest Network, which operates and supports organizations committed to a shared vision of a better world and a strategic approach to social change.

Introduction

A quarter of all North Carolinians live in a home governed by an homeowner's association (HOA).

In North Carolina, state law¹ prohibits HOAs from stopping residents from installing solar. It also prevents HOAs from being allowed to force residents to install solar panels in areas where they cannot function. That being said, state law permits HOAs to place restrictions on where on homeowners' roofs solar is installed which can impact the solar system's performance. Simply the presence of an HOA process adds costs and hassle, which can discourage homeowners looking to go solar.

Rooftop solar is good for the environment and consumers. It reduces our dependence on polluting fuels and eases strain on the grid during periods of high demand. Rooftop solar, especially when coupled with energy storage, can increase resilience to threats like extreme weather – all at steadily falling costs.

This toolkit aims to equip community members with a step-by-step organizing plan to overcome restrictive HOA solar policies.

When you and your neighbors take action, your community will join you.
When community groups know how to make local democracy work for your health and environment, you lead the movement for large-scale transformation.



1. [Section 1. Article 8 of Chapter 160A of the General Statutes](#) - North Carolina Solar Access Law



Steps to Organizing

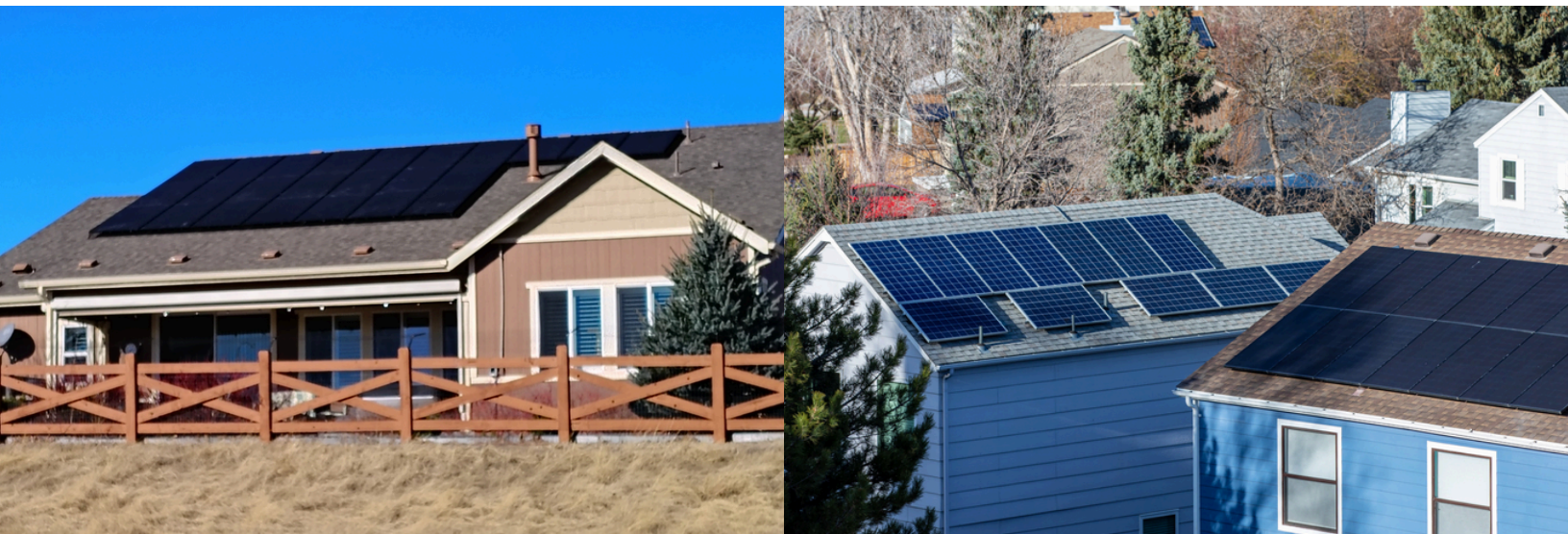
Step 1: Form a Group

- You will want a group of people to help with all aspects of organizing, from research to reaching out to decision makers to gathering petition signatures
- Start talking to your neighbors and find those who want to be involved in organizing to overcome restrictive HOA policies around solar
- Name your group. A name makes you more powerful even when you're just starting out.
- Always be recruiting for new members.
- Establish a core team willing to see the campaign through and build meaningful relationships with each other.
- Establish a regular meeting time and space to make your group more accessible.
- Stay flexible if volunteers come and go.

Step 2: Research the Problem

What is making it hard for your neighbors from going solar?

- Look into the HOA policies that are currently in place and evaluate how they apply to solar. Do they encourage or discourage solar in your neighborhood?
 - In North Carolina, HOAs are not required to make their bylaws publicly visible. They do, however, have to make them available upon request.
- Remember - HOA bylaws cannot explicitly ban solar installation per state statute. However, bylaws may require cumbersome approval processes, prevent you from installing solar on areas of your home visible from the street, or put in place other restrictions that can make it difficult to go solar.
- Use your neighbors as a resource. Ask neighbors about their experience trying to go solar in your HOA.



Step 3: Create a Campaign Plan

What is your goal?

Through organizing, you can challenge specific parts of your HOA bylaws that make it harder for homeowners to install solar. You'll be working to get your neighborhood HOA to amend its bylaws to make it easier for your community to go solar.

Who is the decision-maker?

HOA leadership consists of residents elected to a Board of Directors that governs property rules and regulations. Property management companies can also be involved in some HOAs. However, residents of an HOA neighborhood are also fee-paying members of the HOA and have decision-making power in the association. By organizing, you can build support to change the restrictive bylaws.



Changing HOA Bylaws

Generally, changing an HOA's bylaws requires first seeking board approval, then going through a membership vote of all HOA residents. Your specific HOA's processes may differ. Always be sure to check your HOA's current bylaws to have the most accurate information. You can start off this process by sending a letter to the HOA's board about your proposed amendment and ask to set up a meeting to discuss.

TIP: It never hurts to ask. Before launching a campaign, see if the decision-maker will agree on the spot if you ask them.

Developing a Strategy

Your strategy is your theory for how you will win your campaign. This depends on two factors: whether the decision-maker and the public agree with you, and the influences on the decision maker.

Tie it all together in a strategy statement:

The HOA has the power to remove restrictive bylaws preventing solar installation in the neighborhood. However, they are currently not agreeing to remove these bylaws because _____.
reason for opposition

We can get the HOA to do the right thing if we show support from _____ through _____.
main influence on HOA's decision *tactics that demonstrate support*

Step 4: Tactics

What tactics will be effective in your community?

Tactics are the actions that your group will use to advance your strategy. The tactics you choose should be geared towards inviting broad support for your campaign goals.

The following are examples of tactics that can help you reach your goal:

Building public support: Always be recruiting

Door knocking. Get a group of volunteers together and knock on your neighbors' doors to let them know about your campaign. Ask people to sign onto a petition asking your HOA to remove unreasonable solar restrictions. Your signed petition can show the decision-maker you have the support of the community, and give you contact information for potential supporters and volunteers so you can follow up with them later.

Creating an online petition. A petition is an easy way for your neighbors to show that they support your campaign. You should follow up with everyone who signs your petition and ask them to get more involved. Make sure you ask for people's email addresses and phone numbers so you can stay in touch.

Create an email list of supporters to send campaign updates and event notifications. When a membership vote is scheduled, alert your email list to testify and contact decision makers.

Running informational meetings. An informational meeting can be a way to bring out neighbors who are curious about solar and your campaign but aren't yet connected with you. Make sure you have a sign-in sheet so you can collect their information and follow up later.

Phone banking. Get a group of volunteers together to call your supporters and invite them to meetings, turn them out to HOA meetings, remind them to vote, and more.

Hosting a solar tour. Work with a local church, business, solar homeowner, or other building that already has solar installed to host an educational tour of solar technologies and to answer questions

TIP: Your time is valuable. Do not waste your time trying to convince people who oppose your campaign. Focus instead on engaging people who are undecided or leaning in support of your efforts.

Media & Social Media

Create a Facebook page for your group and post regularly. Use the page to post events, articles, and post a lot of pictures. Some community groups even set up paid advertisements to reach members of your community.

Scientific Research & Evidence

Learn a few facts to back up your ideas. It is important highlight the benefits of switching to solar to advocate for it. You can present statistics on the environmental benefits, but also consider factors such as cost benefits, and increased reliability when faced with extreme weather.

Meeting with Your Decision Maker

Meet with members of your homeowner's association to build a relationship, explain your amendment, and get them on your side. Create a folder or a curated packet of resources for the decision-makers. Every time you meet with them make sure to come with handouts. Provide personal stories, as well as simple, digestible statistics and information.

Materials to include: Relevant state statute stating HOAs are not allowed to restrict solar installations, information on the benefits of solar, specific plans for your home solar project

Running for HOA Board

If your HOA is unwilling to amend its bylaws after building and demonstrating broad support through the above tactics, consider running for HOA board to change who the decision maker is. Your HOA will have its own guidelines for elections, but in all cases you will need to gather enough votes from other residents to win an election. Use the support you have built through previous tactics such as door knocking and petitioning to get your neighbors to commit to electing you to board membership to overcome restrictive solar policies.

See more in the Organizing Case Study.

TIP: Communities around the state have found success by identifying a unifying reason to move towards solar energy solutions. Every community is different. Some found that sharing a message on cost and affordability was most effective. For others, focusing on the potential to hold up against extreme weather without relying on utility providers was most helpful.

What would resonate in your community?

Scientific Research & Evidence: Resources

Some resources that might be helpful in your advocacy include:

1) A shift to emission-free energy from the wind, sun and other renewable sources can solve many of America's most pressing environmental and public health challenges. North Carolina has the technical solar potential to meet 2020 electricity demand 11 times over.

a. [We Have the Power: Environment North Carolina's report on realizing clean, renewable energy's potential to power America](#)

2) How much of North Carolina's energy comes from rooftop solar? And how does it compare to neighboring states? Find out using the interactive map and dashboard in this resource.

a. [Rooftop Solar on the Rise: Report on the growth of small-scale solar production in North Carolina](#)

3) How much of North Carolina's energy comes from renewable energy sources?

a. [The State of Renewable Energy Dashboard: Tracking the growth of renewable energy across the country](#)

4) How does North Carolina compare to other states on adopting permitting and inspection policies that remove barriers for home solar panels and batteries?

a. [Solar Permitting Scorecard: Grading all 50 states on removing obstacles to rooftop solar and home batteries](#)

All resources can be found online through Environment North Carolina Research and Policy Center.





Organizing Case Study

Running for HOA representative in Holly Springs, NC

Jack Gerdeman lives in Holly Springs, North Carolina and wanted to put solar on his home to reduce his contribution to carbon emissions. When he ran into challenges from his HOA that prevented him from installing solar panels on his roof, Jack built support from his neighbors. Eventually, because of the support Jack built, they were able to overturn the HOA's restrictions and helped grow solar in the neighborhood.

When Jack first applied to his HOA for approval to install rooftop solar, his HOA would only allow him to place solar panels on the back of his roof. These restrictions limited the solar panels' efficacy. The HOA bylaws restricting solar panels were put in place by builders when the neighborhood was first constructed and continued to be enforced by HOA board members who were resistant to change. Jack sought to strike these bylaws to allow solar panels on the front of his roof where they would be most effective, starting by sending letters back and forth with the HOA board. At first, the HOA did not budge, stating that they needed to stick with the bylaws already on the books.

Jack then started a petition to the HOA board. He talked with his neighbors about his goals of allowing solar on homeowners' roofs regardless of which way they faced. Eventually, more than 60 people in the neighborhood signed the petition. But still the HOA board didn't budge. That's when Jack realized that, in his case, to win a change the bylaw, he needed to change who the decision-maker was. So, Jack and a friend decided to run for the HOA board themselves. If they won, they would have enough pro-solar votes on the HOA board to change the bylaw.

For a month, Jack and his friend campaigned to get elected to the HOA board. Every day after work, Jack knocked on doors throughout the neighborhood to build support for his and his friend's candidacy. Typically, turnout in an HOA election is quite low - previously, board seats could be won with just 10 to 20 votes. In the end, because of his outreach and organizing on the solar issue, Jack secured 86 votes in support of his candidacy. His friend was elected too. After Jack and his friend won seats on the HOA board, they held a vote on the proposal to strike regulations restricting homeowners' ability to install solar (with the exception of the requirement that solar panels match the roof's color). With a majority of HOA board members now being favorable to solar, they won the vote and overcame restrictions to the growth of solar energy right in their neighborhood.

Since the restrictions were struck down, the number of homes in the neighborhood that have installed solar panels has increased from 3 to 20.

Jack's story shows that by forming a group, building support, having a strategy and staying flexible, you can win.

Jack's Advice:

- Your HOA are first and foremost your neighbors - people that you can easily talk to and connect with. Don't treat them as a faceless government agency that is impossible to speak with.
 - Ask directly for a meeting instead of going back and forth with letters. A face-to-face conversation is the most effective way to get your neighbors on board.
- Avoid getting into opposition against management companies involved in your HOA. Their job is to enforce the HOA's current rules and are much less flexible than HOA board members who are your neighbors.
- Understand the messaging that resonates best with your neighbors. In this neighborhood, Jack often talked to neighbors about the importance of being able to choose what we do with our own property and financial benefits, all while getting to help the environment.
- This process will take time, but it can be easier with a team. Jack canvassed his neighbors after work hours over about a month on his own, but with more volunteers on board you can reach even more neighbors over a shorter amount of time.



Jack's home in Holly Springs, proudly boasting solar panels.