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Sonoma County Energy Independence Program

Marketing Education and Outreach (MEO) Plan

Energy Upgrade – CA

5/26/11

I. INTRODUCTION

The Sonoma County Energy Independence Program (SCEIP) received a \$3 million dollar grant from the California Energy Commission to implement Energy Upgrade California in Sonoma County. Specific changes to the Program through this funding include marketing, education and outreach to inform customers and contractor participants of program changes and new opportunities that will occur as SCEIP moves to align with federal/state guidelines and other program offerings. The primary program changes to be featured in the MEO include the new requirements and benefits of home energy analysis, contractor credentials, and loading order efficiency measures and standards for energy efficiency projects. (HERS II analysis, 10% energy reduction prior to installing windows or renewables and compliance with DOE requirements).

Energy Upgrade California promotes energy-efficiency and green building upgrades for existing properties, including residential, commercial and multi-unit residential. The program offers the convenience of a “one-stop shop” experience—providing the tools and resources to educate and motivate participation among property owners about eligible upgrades, program-qualified contractors, rebates and financial resources. Working with Participating Contractors, property owners can follow one of several paths to make upgrades to their properties that increase energy efficiency, improve indoor air quality, conserve natural resources and utilize green building products and practices.

This localized plan draws upon and leverages information and experience from model programs and successful outreach strategies implemented in other community “retrofit” programs locally, regionally, statewide, and nationally. The primary sources supporting the recommendations in the MEO Plan are drawn from the RCPA Marketing Implementation Plan, the Regional Marketing and Outreach Plan (*MIG marketing agency, adopted through ABAG for regional implementation, January 2011*) and the *Driving Demand for Home Energy Improvements* study (*published by Lawrence Berkeley National Laboratory, September 2010*).

The following MEO Plan outlines and prioritizes specific communication and outreach tactics to drive local consumer demand and support local contractors in the promotion of Energy Upgrade California.

II. Communication Goal and Objectives

The communication goal for Energy Upgrade CA – Sonoma County follows the marketing principle and best practices outlined in the *Driving Demand* study: that “one touch is not enough and that a message must be delivered multiple times before a consumer will engage in learning more about a product or service.”

The following communication objectives are key components:

- Though a combination of targeted and broad messaging will be employed locally, the primary focus in terms of strategy and allocation of time and budget will be toward reaching the consumer target audiences (Early Adopters, Residential Retrofit Ready, Residential Retrofit Persuadable) in direct ways.
- An emphasis will be placed on the value and benefit of home energy analysis, HERS II rating, the “whole-building” approach to efficiency, and the requirement to meet 10% efficiency first before windows and renewables.
- Targeted approach will include focusing on the demographic profile in reaching our audience(s) where they:
 - Live – Working with the hot spot maps, we can target our outreach by contacting property owners through their property addresses with a combination of door-to-door canvassing, direct mail, and phone.
 - Work – By understanding the demographic of our target audiences we can partner with local, large employers with similar demographics among their employees. Local companies like Agilent, Kaiser Permanente, Medtronic, Redwood Credit Union and others have corporate programs to encourage employee participation in sustainable practices.
 - Play – Demographically, we can identify the events, places, and activities that our audiences participate in, outside of their home and work, including community events, shopping, recreation, and through their community networks (i.e. church, schools, memberships).
- Contractor’s support and engagement is an important component throughout the MEO. As the “front lines” and key sales force for the Energy Upgrade CA-Sonoma County program, it is vital to have their input, participation, and buy-in with the local communications outreach. Contractor education and outreach will include a focus on the new Program requirements, certifications and trainings available.
- Outreach and messaging will utilize “trusted messengers” delivering a consistent message through a variety of channels throughout the program year.

III. Messaging

KEY MESSAGE: Energy Upgrade California in Sonoma County is a new program that helps property owners reduce their energy use and save money with rebates, incentives, and financing. Through this program, Sonoma County businesses and residents address their energy saving needs by taking a “whole-building” approach, because it takes more than just switching out light bulbs to achieve maximum efficiency.

Drawing from the *Driving Demand for Home Energy Improvements* study and recommendations, messaging will be developed with the following in mind:

- People are more sensitive to losses vs. gains; e.g. “Is your home or business leaking energy and money”, “Are you spending too much on utility bills”, and “Upgrade now, or you’ll pay for it anyway in higher energy costs”
- Environmental messaging is low; comfort and savings are more important
- Selling something people want: comfort, health, practical investment, self-reliance

- Rebates, financing, and incentives matter
- People are motivated by testimonials and messages from “trusted messengers,” such as people they know and opinion leaders

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IV. TIMELINE

While certain elements of the local marketing program are already underway, the majority of the marketing campaign will follow a phased rollout schedule beginning in May, 2011. This phased approach will allow for the most effective use of the marketing budget and will provide consumer and contractor education to the target audience(s) in advance of the more costly direct approaches and tactics.

Phase 1 (May, June, Q2) Build Consumer Education

This phase will complete the readiness phase for program launch already underway, including finalizing collateral needs and production, developing and initiating media and advertising plans, setting up social networks, and organizing marketing committee and outreach network. Consumer education will be achieved through the outreach network, events and tabling, media and advertising, and through the Early Adopters campaign.

Emphasis: Outreach Network, Early Adopters, Consumer and Contractor Education

- Organize a marketing committee to provide oversight, additional resources, and to refine and adjust the strategies as they are tested in the market (see Attachment A, Marketing Committee)
- The immediate development and production of marketing collateral (including gathering consumer testimonials), public relations material, and web enhancements/functionality for local web page
- Establish social media networks
- Determine additional incentive promotions for early adopters (Energy Champions) and home tour hosts (see Marin model for incentives)
- The coordination and cross-training of the local marketing program with partners, stakeholders, and contractors
- Conduct contractor workshops to train and educate about program changes and provide guidance on sales and marketing
- Implement Early Adopters campaign (see Attachment B, Early Adopters Campaign)
- Consumer education by securing and/or lining up earned media coverage through all local newspapers, radio talk shows and newscast, and Channel 50 and Comcast television.
- Additional consumer education through participation in community events (see Attachment C, Criteria for Event Participation), presentations at community meetings (Outreach Network, Attachment E), and through stakeholder and partner outreach channels
- Line-up and secure partnerships, co-marketing opportunities, and media sponsorships.
- Initiate targeted advertising campaign
- Confirm door-to-door approach(s) and plan for contacting target of 1,000 Retrofit Ready and 19,000 Retrofit Persuadable homeowners
- Design and initiate Energy Upgrade Employer Campaign (Sonoma County Employer Campaign for Energy Upgrade-CA, draft plan Attachment D)
- Leverage regional and statewide marketing of Energy Upgrade CA – Sonoma County

Deliverables:

Marketing Committee structure, timing, priorities; Outreach Network plan, recruitment and training; Printed collateral (may include but not limited to brochures, flyers, posters, banner(s), inserts); Media Plan and Press Kit; Exposure through earned media coverage (print and radio); Cross training with partners (including city and county staff; Early Adopters campaign kicked off; Tabling at community events; Advertising Plan (including

media sponsorships); Door-to-door plan; Employer Campaign design and plan; Co-marketing plan; Social Media networks launched

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Phase 2 (July, August, Sept, Q3)

This phase will continue outreach strategies in Phase 1 (outreach network, events/tabling, media/advertising, Early Adopters) and will expand to include Home Tours and Door-to-Door canvassing.

Emphasis: Speaker's Bureau, Early Adopters, Employer Campaign, Direct approach with Residential RR/RP

Ongoing

- Outreach through speakers' bureau, stakeholder, partners, and contractors
- Energy Upgrade Employer Campaign; contests, incentives, promotions
- Media outreach
- Targeted advertising campaign
- Early Adopters Campaign; profile testimonials, enroll in speaker's bureau, outreach to neighbors, friends, co-workers, social media networks
- Participate in tabling and workshops at select events and retailers
- Leverage regional and statewide marketing of Energy Upgrade CA – Sonoma County

Initiate

- Home Tours in select neighborhoods
- Direct contact through door-to-door canvassing, utility bill inserts, and direct mail with select neighborhoods and in phased roll-out

Deliverables:

Outreach Network launched; Employer Campaign launched; Media and Advertising Campaign (including print, electronic, and web); Early Adopters testimonials; Tabling and participation in community events; Home Tours; Direct contact with Residential RR/RP through utility bill inserts and/or door-to-door

Phase 3 (Oct, Nov, Dec, Q4)

Phase 3 will include an opportunity to evaluate marketing and outreach strategies in Phase 1 and 2 to identify the strengths, weaknesses, opportunities and threats. Consumer messaging should build upon testimonials.

Emphasis: Direct to RR/RP, Winter Prep Message

- Shift consumer messaging to focus on getting property ready for winter efficiency and comfort
- Assess outreach and marketing tactics; adjust and re-align as needed
- Continue outreach strategies from Phase 1-3 with heavier concentration in October and early part of November; lighter activity and investment during late November/December

Deliverables:

Marketing Program evaluation; Collateral focus on pre-winter message; Advertising shifts to pre-winter message; Ongoing consumer outreach (driven by evaluation of results of previous marketing strategies) through event/retail tabling, door-to-door, home tours, media and advertising.

Phase 4 (Jan, Feb, March, Q1 2012)

Phase 4 will also be an opportunity to evaluate and re-align as needed. Message strategy may include a final push for limited offers on rebates and on helping reach the goal for Sonoma County. Other actions include:

Emphasis: Direct to Residential RR/RP, Reaching Targets, Celebrating Successes

- Evaluate, re-align and make final push with most successful outreach tactics
- Celebrate success; acknowledge homeowners, Energy Champions, community leaders
- Determine and plan for Energy Upgrade CA in Sonoma County beyond March 2012

Deliverables:

Marketing Program evaluation; Collateral and message focus on final push for incentives/rebates; Ongoing consumer outreach (driven by evaluation of results of previous marketing strategies) through event/retail tabling, door-to-door, home tours, media and advertising; Celebration and acknowledgements of Energy Champions, Employer Campaign successes;

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Proposed Budget Allocation

Program Marketing Manager	10,000
Events/Promotions	20,000
Mailing	5,000
Printing	18,000
Photography	2,000
Advertising	25,000
Canvassing	30,000
Total Budget:	\$110,000

Additional funding will be needed to sufficiently cover advertising, canvassing, multi-media (videos), and incentives. Need to leverage budget with RCPA marketing fund allocation, media sponsorships, retailer sponsorships, and co-op advertising with contractors.

ATTACHMENT A

Energy Upgrade Sonoma County

Marketing Committee

Purpose:

To work with the Program Marketing Manager in providing direction and resources in the successful execution of the local Marketing, Education and Outreach Plan. The Marketing Committee will lend their expertise, time and resources to the strategic planning and development of:

- Energy Upgrade CA Sonoma County branding and messaging
- Promotional opportunities
- Specific program design and messaging (e.g. Early Adopters Campaign, Business Campaign)
- Outreach and communication strategies
- Partner and stakeholder outreach
- Contractor support and engagement
- Media outreach
- Sponsorships

Phase 1 (May/June) Focus: messaging, collateral development, program design and approach method for door-to-door campaign, and homeowner incentive options

Members: (current)

Chair, Kathy Goodacre
Mike Sandler
Liz Yager
Chris Cone
Donna LaGraffe
Diane Lesko
Lori Houston
Stacey Meinzen
Contractor (proposed)

Structure:

Committee to meet monthly, or more frequently as needed, through March, 2012.

ATTACHMENT B

Early Adopters Campaign (Energy Champions)

The Early Adopter category comprises those property owners who need little or no motivation to participate in the program. They are often highly educated professionals with a strong concern for the environment and awareness of the benefits of energy efficiency and green building. Sonoma County is a prime market for Early Adopters with a strong community of environmentally aware and active citizens, leaders, and elected officials.

Sonoma County Target Audience

- Elected officials, city, county, state
- Non-profit directors, staff, and board members of environmental or progressive organizations
- Business leaders with a stake in Energy Upgrade CA
- CEOs and managers of companies with a sustainability mission and interest
- Donors and supporters of elected officials and organizations who represent sustainability and environmental concerns
- Celebrities and public figures with concern for environment

Approach

- Primary approach for Early Adopters should be directly in face-to-face meetings and/or in small group presentations
- Promote as a peer group of Energy Champions
- Peer-to-peer basis
- Utilize trusted messengers
- Utilize website and email of partner organizations
- Recruit through membership drives, events, group and board presentations

Energy Champion Actions

- Have a home energy analysis and complete a home energy upgrade on your own home.
- Host a home tour after you upgrade project is complete, or to show a demonstration of a home energy analysis
- Become a fan of Energy Upgrade in Sonoma County on Facebook and share it with your Friends
- Participate in our Outreach Network as speakers and advocates
- Refer and introduce us to influential individuals or groups who can help us reach out in their communities

Incentive

Consider incentive for first 50 or 100 Energy Champions; with additional incentive for those who agree to host a home tour (see Marin County model).

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ATTACHMENT C

Criteria for Participation Events, Sponsorships, Speaking Engagements Energy Upgrade California – Sonoma County *Residential-Single Family*

All activities should include Sonoma County focus with Sonoma County draw.

Primary Factors: Audience

- Sonoma County property owners who meet the Retrofit Ready and Retrofit Persuadable demographic
- County-wide
- Neighborhood specific opportunity relevant to hot spot map locations of RR/RP and/or WNA
- Sonoma County contractors/builders
- Environmental theme with an Energy component (Early Adopters)
- Stakeholders, partners, and early adopters
- Real Estate Agents (for Energy Analysis) testing for “energy score” (part of sale disclosure)
-

Secondary Factors: Impact

- Potential draw of audience in numbers relative to financial investment
- Potential draw of audience in numbers relative to time investment
- Energy Upgrade message is prominent and not diluted by other event messaging
- Expected outcomes and deliverables considering potential # of energy analysis and retrofits; value of consumer education; raising awareness
- Participation from other partners and/or stakeholders
- Politically or by brand we should be represented; “It’s the right thing to do or the right place to be seen”

ATTACHMENT D

Energy Upgrade Business Program *(Final Plan and Details to be developed)*

Energy Upgrade California™ in Sonoma County (Energy Upgrade) is launching a business outreach program that provides companies with two options to support local clean energy goals.

- **Energy Upgrade employee outreach:** This program provides tools and recognition to businesses that distribute and support employee participation in the residential Energy Upgrade program
- **Non-residential energy-efficiency pilot:** This pilot program is developing a new service to help medium and small business obtain the economic benefits of improving building efficiency

Employee Outreach Program

With the launch of the Energy Upgrade program, residents have a convenient and cost-effective service to make energy efficiency and renewable energy improvements to their homes. The employee outreach program provides businesses with (1) tools to educate their employees about the Energy Upgrade service and benefits and (2) a community recognition program to acknowledge sponsoring businesses.

Employee Outreach Tools

Co-branded Energy Upgrade brochures	Energy Upgrade content for company Web/newsletters
Employee presentations	Ideas for internal division contests or competitions
Additional outreach tools per NBLC	Energy Upgrade participation in current employee outreach

Community Recognition

Annual business sponsor awards program ¹	Employee projects featured on Energy Upgrade Web site
Web reports on employee participation ²	Business sponsor listing on Energy Upgrade Web site
News and feature articles	Co-branding opportunities for Web/collateral

Additional recognition strategies per NBLC

Non-Residential Pilot Program

The Energy Upgrade in Sonoma County program includes non-residential buildings. A pilot program is currently underway to make (1) non-residential energy efficiency and water conservation services easy to use and (2) facilitate compliance with [AB1103](#), which requires non-residential building owners to disclose ENERGY STAR® Portfolio Manager benchmarking data and ratings for the most recent 12-month period to a prospective buyer, lessee, or lender beginning January 1, 2010. Building owner benefits include: use of the Energy Upgrade financial tool to assess improvement value, lower building operating costs, lower vacancy rates, greater resale value, and early compliance with AB1103. Business owner benefits include: lower operating costs, improved comfort and healthier indoor air, and employee satisfaction and productivity. Pilot program information is provided on the following pages.

Insert KEMA's three-part pilot package in PDF here.

¹ Suggest winner based on percentage of employees with Energy Upgrade project during that year with different winner criteria based on company size (small, medium, large).

² This could be a thermometer graphic such as is used for fund raising campaigns.

ATTACHMENT E

Energy Upgrade Sonoma County — Outreach Network

To build the market demand and public support needed to conduct energy analysis and efficiency upgrades of Sonoma County buildings requires engaging the entire community in an economic and cultural shift. To do this, we need the participation of a wide range of community, government, and business stakeholders to establish a team approach to outreach that offers a clear consumer message, maximizes resources, and minimizes duplication of effort.

Establishing an Outreach Network provides the means to (1) coordinate activities of lead partners, (2) identify aligned community stakeholders, (3) engage stakeholders in a manner that complements their missions, and (4) maintain ongoing communication and collaboration for effective consumer education.

The Outreach Network will provide specific tools: (1) an online contact management service to help network participants track/coordinate outreach activities, (2) a consistent consumer message and one-stop-shop Web resource, and (3) outreach tools including presentation content, marketing collateral, and training on outreach best practices.

Outreach Network Team

The Outreach Network team consists of:

- **Energy Upgrade California™ in Sonoma County partners**, Regional Climate Protection Authority and Sonoma County Energy Independence Program teams, Energy Upgrade contractors, and Advisory Committee members
- **Local organizations with directly aligned missions** and programs such as the City of Santa Rosa Clean Energy Advocates, Solar Sonoma County, Sonoma County Energy Watch, and Climate Protection Campaign

Outreach Channels

The Outreach Network will help coordinate (1) presentations to community, business, and government groups (e.g., chambers of commerce, civic groups, homeowners associations, real estate, and professional groups), (2) presentations and workshops at community events, and (3) tabling activities at community events and retail venues. In addition, the Outreach Network will support an Energy Champions campaign to encourage opinion leaders to implement Energy Upgrade improvements and share their experiences with their constituents.

Tools

- **STAKEHOLDER LIST:** List of stakeholder groups, group leaders, and individual community opinion leaders
- **CONTACT TRACKING:** Contact management database to track communications
- **EXPERT SPEAKERS:** Speakers' bureau composed for RCPA and SCEIP representatives and select stakeholder and industry leaders trained in Energy Upgrade program features, value proposition, and process
- **PRESENTATION MATERIALS:** Suite of presentation materials customized to each audience's interests
- **EVENTS:** Schedule of existing community events for outreach participation
- **SOCIAL NETWORKING TOOLS:** Appropriate Web-based social networking resources to support active communication
- **ENERGY UPGRADE MARKETING RESOURCES:** State, regional, and local marketing materials and Web resources