Ecology Action: Regional Outreach & Coordination
Three Tiers of Participation

Statewide Services – All 58 California Counties – Program Level
- Marketing Toolkit and Support
- Web Portal
- Finance Clearinghouse
- Workforce Scholarships

Additional Regional Services – 30 Counties – Program Plus Level
- Finance subsidy
- Rebates for HERS II assessment and verification
- Additional Services – On the ground technical assistance, outreach and education to property owners, contractors and city/county staff, access to contractor

Pilots – Commercial & Residential PACE – 3 Counties, 1 City – Pilot Level
- Pilot Residential and Commercial PACE programs to demonstrate the viability and replicability of the PACE model

Your Program Plus ‘On the Ground’ Delivery Team

- Increase Energy Efficiency, Water Efficiency and Renewable Energy Generation System Installations and Upgrades
  - Conduct Locally Appropriate
    - Outreach and Education
    - Technical Assistance
    - Customer Support
  - Engage Stakeholders:
    - Contractors
    - Property Owners
    - Local Governments
Local Government Engagement

Local Governments will assist in the design of Energy Upgrade California by participating in:

1. **Local Government Advisory Committee (LGAC)**
   *Provides input, advice and feedback to guide local program design, development, roll-out, administration and local marketing within each target region; composed of representatives from the participating Program Plus counties and cities.*

2. **Technical Advisory Council (TAC), will provide analysis and feedback on the most appropriate opportunities for Program engagement, coordination, graduate promotion, and job placement**

---

Resources To Drive Change

- **Workforce Scholarships:**
  - BPI-BA / HERS II Certification Assistance

- **Property Owner Incentives:**
  - HERS II Test-In / Test-Out Rebates for Property Owners to encourage more ‘Whole Home Upgrade’ projects
Timeline & Next Steps

• Feb-Mar 2011
  – Discovery Process & Local Engagement

• Mar-May 2011
  – LGAC & TAC Engagement
  – Localized Program Planning, Enhancement & Initial Field Implementation
  – Customer Incentives & Contractor Scholarship Roll-out

• Mar-Mar 2012
  – Full Field Implementation

Program Launch Resources

• Statewide Program media rollout set for March 1st

• Press release announcing Program to be issued statewide via a wire service, reaching newsrooms throughout CA, including print, radio and TV.

• Boilerplate template language for use in localized press releases will be made available

• Press protocol guidelines will be issued shortly to promote success stories and help support earned media opportunities
Contact

Brennen Jensen, bjensen@ecoact.org

Energy Upgrade California: Web Portal

Reduce energy use. Save money. Create jobs.
Local Financing

Sacramento County

Sacramento Municipal Utility District (SMUD) Residential Loan Program

SMUD offers property owners within its territory the opportunity to finance energy- and water-efficient property improvements to encourage its customers to replace high energy use equipment with more efficient models. SMUD offers both secured and unsecured products.

Funding Terms for Unsecured Loans:
- Eligible Upgrades: Energy Efficiency
- Interest Rate: 10.74/yr
- Maximum Payment Terms: 7 years
- Maximum Finance: $30,000

Funding Terms for Secured Loans:
- Eligible Upgrades: Energy Efficiency
- Interest Rate: 8.19%
- Maximum Payment Terms: 10 years
- Maximum Finance: $93,000

Program Details:
- All applications must be completed and submitted with SMUD.
- All approved applications are subject to the terms and conditions of SMUD.
- All applications are subject to credit approval.

Participation

- Contractors
  - Go through utility training for whole house program or register for CEC solar list
  - Register for EUC site through unique URL sent to each qualified contractor via email

- Rebates
  - If already a participating organization, go through local Engage 360 organization administrator
  - If not currently a participating organization, sign-up (Engage 360 is not currently accepting new sign-ups but will again in the future)

- Local Content
  - EUC team is establishing criteria for customizing content
  - Will provide access and training soon
Contact Information

Renewable Funding
Annie Henderson
510-451-7911
feedback@renewfund.com

Energy Upgrade California
Marketing and Communications
Key Target Markets

- Homeowners, aged 35-54
- Women (college-educated)
- Incomes of $60,000-$120,000
- Multicultural
  - Asian (63%), Latinos (62%), African-Americans (59%), White (47%)
- With school age children at home (large families)
- Speak Spanish as a primary language
  - Took survey in Spanish—68% positive responses

Key Target Markets (continued)

- Homes built before 1940 (expand to built before 1978)
- Have made some energy upgrades already
- Transitioning (buying a house or increasing family size)
Key Messages

• Save with Rebates
• Save on Utility Bills
• Participating Contractors Save Money
• Help the Environment/Climate Change
• Reduce Foreign Oil/Fossil Fuels
• Increase Property Values
• Comfort and Indoor Air Quality

Messengers

• Neighbors and other homeowners
• Building Contractors
• Architects/design professionals
• Gas and electric utilities
• Environmental organizations
• Home improvement store staff
• Realtors
Market Capture Cascade

<table>
<thead>
<tr>
<th>Already There</th>
<th>Retrofit Ready</th>
<th>Retrofit Persuadable</th>
<th>The Next Phase</th>
<th>No Way</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environment</td>
<td>Save money on utility bills</td>
<td>Property Values</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fossil Fuels</td>
<td>Rebates Available!</td>
<td>Comfort</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rebates</td>
<td></td>
<td>Health</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Available</td>
<td></td>
<td>REBATES Available!</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Branding
Vision

- The Energy Upgrade California brand is inspirational and aspirational – motivating users to make energy efficiency upgrades to their homes by presenting a compelling vision of a better quality of life.
- The brand vision is dynamic, positive and upbeat, and conveys a lifestyle of personal comfort and connection to the environment.
- The brand reaches viewers at an instinctual and a rational level...
  - “That’s what I want!”
  - “How do I get it?”

Core Principles

- Quality
- Clarity
- Creativity
- Consistency
- Community
What are we asking CONSUMERS to do?

- **Get a contractor!**
- **Basic Upgrade Package**
  7 simple measures to “seal” their homes and to decrease energy use by 10%. ($1000 rebates available)
- **Advanced Upgrade Package**
  Customize efficiency package starting with the basics and adding on HVAC, windows, hot water heaters and others as defined by their contractor to achieve 20% decrease in energy use up to 40%. (rebates up to $4,000)

What are we asking CONTRACTORS to do?

- **Get BPI Certified!**
- Participate in Program Orientation and Training
- To be the front person to the homeowner
- To complete Energy Assessments for the Advanced Upgrade Package
- To do the work in concert with sub-consultants as needed
The Logo

Logo Elements

the logo

the icon

the wordmark

Reduce energy use. Save money. Create jobs.
Color Variations

- preferred full color
- acceptable one-color variations
- one color variations against dark backgrounds

Brand Guidelines

graphic standards guide
Vocabulary – Getting the Words Right...

Statewide Marketing Tools
Statewide Marketing Elements

- Advertising
- Website
- General Collateral and Templates
- FAQs
- Speaker Kits - Talking Points
- Video - 2 min. for web, 5-min. for presentations
- TV Spots - 30 seconds (English and Spanish)
- B-Roll for media/PR
- Social Marketing Tool

Statewide Advertising

Limited Statewide Advertising
- To fill in gaps and supplement local marketing

Online Advertising
- Paid search and banner ads

Radio Spots
- PSAs
- Energy tips
Statewide Marketing Collateral and Templates

- For all counties and cities
- Support for local efforts
- Some customizable—Add local information about rebates, incentives and financing
- Building blocks—Pick and choose to create a marketing program that works for you
- Decision Tool—Decide what your local marketing program looks like
- Support and coordination—Help when you need it

Delivery Channels

How do you get marketing collateral?

Statewide Resource Library
- Marketing Toolkits for Program Team, Cities, Counties
- Marketing Toolkits for Contractors
- Marketing Toolkits for Affiliates

Print-on-Demand Site
- Brochures, Fact Sheets, Marketing Materials
- Print what you need
Protocols for Use

Eligibility Requirements

• Who can use marketing materials?

What’s available?

• A comprehensive list of materials

Review Process

• If you customize, go through review and approval process

Powerpoint Template

Energy Upgrade California

• Statewide energy and resource efficiency and conservation
  energy generation improvements and multi-family resources
• Collaboration between Utilities Commission, private sector
• One-stop resource for upgrade benefits, find qualified contractor, energy ratings
• Coordinates federal, state, and government programs for contractor and participants
• Creates a foundation for sustainable programs
Brochures

High utility bills? Get over $4,000 for energy efficiency improvements!

Take a “Whole House” Approach
The sum is greater than its parts

Increasing your home’s efficiency isn’t just switching out light bulbs or lowering your thermostat. It’s taking a comprehensive, whole-house approach. High-efficiency water heater, energy-efficient windows, and new doors work together to make your home more comfortable, save money, and cut down energy costs.

Energy Upgrade California

Brochures

California’s Energy Efficiency Solution

Energy Upgrade Supports California

Reduce energy use. Save money. Create jobs.
Posters and Flyers

Outdoor Ads

Reduce energy use. Save money. Create jobs.