

Marketing and Outreach Plan

Education and marketing of the program will start with the two towns and their volunteers. As the installer will not be on board until sometime in January, the marketing of the program will begin as soon as the grant is awarded. Given that residents must first have an energy audit before participating, our initial efforts will be to promote the MassSave energy audit program. We have already released a survey (see **Local Interest**) about the potential HeatSmart program and about 90 residents expressed interest within one week of limited advertising about the potential program. Our marketing plan will start with these residents and include educational information, energy audit contacts and process, and initial information about the HeatSmart program. Targeting these first responders will also help us pilot and refine our educational and promotional strategies as we expand to reach out to all residents quite quickly as noted below.

Our initial planned actions, within the first two months of award, include:

- Team (see **Team Description**), led by the two HeatSmart coaches, will meet to develop more detailed marketing plan and strategy. By having two towns working together, we will have input from both towns' experience with the Solarize Mass programs. This gives great opportunity to learn from each other and develop one plan, accounting for town specific nuances.
- Team will identify more volunteers to help with promoting the program. We have some volunteers already identified from the Solarize Mass program and anticipate that we will be able to recruit more, as noted below, through our community efforts.
- Team will develop materials to distribute and post online about the HeatSmart program. This will also include news stories for the local newspapers.
- Team will train volunteers who can assist in distributing information at various forums as noted below.
- Volunteers will contact residents who showed initial interest, based on the survey
- Several outreach channels for getting the word out will be scheduled (community forums, meetings with community organizations, website).
- In January, once the installer is selected, the Team will meet with the Installer, determine how the team, volunteers and installer will interact, and create additional materials about the technology, options, pricing, savings, etc. Team will update volunteers who are promoting the program.
- Team will identify community forums in which the team/volunteers and the installer will present the information about the HeatSmart program technologies.

Marketing and Outreach Channels:

The towns of Bolton and Harvard pledge to use marketing and outreach approaches similar to those used to obtain high response rates to their Solarize projects. Marketing techniques will be twofold: (1) General visibility and education, and (2) one-on-one interactions.

General visibility and education: Harvard and Bolton plan to market HeatSmart through a number of community events, forums, cable television, print media, website and social media, direct mail programs, and signs/banners/posters.

Examples of specific marketing opportunities include:

- **Community Gatherings/Local organizations:** Many local organizations have overlapping membership and a willingness to work together. HeatSmart would reach out to these other organizations to allow HeatSmart Volunteers to come to their meetings and present the program. Examples include: Rotary Clubs, Lions Clubs, League of Women Voters, Conservation Commissions and Conservation Trusts, Energy Committees, and Council on Aging (with specific information to address low and moderate income options). Special events in both towns will allow for organizations to set up booths to provide education about the HeatSmart program. These include such events as the Bolton Local Repair Café, which happens quarterly, and Annual Town Meetings, which have significant number of attendees. Other gathering places where volunteers can be present include: transfer stations, local eateries, sports events and libraries.
- **Community Forums:** The League of Women Voter conducts meetings for the purpose of educating town residents and we expect we can work with them about the HeatSmart program. Harvard had its first spring environmental

forum and plans to repeat this event. Forums can also be set up in the local libraries. Some of these meetings can also be recorded and publicized on the town cable stations.

- Cable Television: Both towns have cable TV stations and will be able to film and run information about the HeatSmart program with the potential for the development of a video not only explaining the program, the cost and benefits and how to seek an evaluation/installation but also showing an installed system. The Harvard Bromfield School has TV production classes and requirements that seniors do a 40-hour senior service project, of which HeatSmart would be a perfect project. There is also a “Green Team” school organization in both towns that will be tapped to be part of these efforts. Students may be some of the volunteers for the program.
- Open House: There are several homes in each town that already have HeatSmart technology for their heating and cooling. We anticipate having at least one home in each town where residents can see the technology. One of these open house homes is already secured, as the home belongs to a team member in this application
- Print Media: Both towns have weekly newspapers with significant readership. We will ask that they report on the program and we will write letters to the editors to create visibility for the program. The Harvard Press has a column, “Consider This” in which a resident can write a half page article. We can use this forum for HeatSmart education. Harvard is also restarting its Welcome Wagon for residents new to town and materials about the HeatSmart program can be included in the packet of information given to new residents.
- Website and Social Media: We will create a joint HeatSmart website, re-using relevant components from <http://www.solarizebolton.org/home.html>, with technical information, cost and benefits of the program, installer information, community contacts, and other information deemed relevant for this project. “Nextdoor” a social media network already exists in both towns, allowing residents to post information, seek volunteers, and advertise services/programs. Harvard has over 3000 individuals (61% of households) and Bolton has close to 1000 (29% of households) that subscribe to Nextdoor. This social media site has already been used to for a preliminary survey of residents regarding their interest in the HeatSmart program and currently we have 153 responses with close to half who are requesting additional information about the technology and the pilot program.
- Direct Mail: Direct mail pieces have worked well for town elections, school and town communication and local events. Part of the marketing budget would be used to provide information about HeatSmart – what it is, what the benefits are and who to contact for further information.
- Sandwich Boards/Banners/Posters: The **Marketing Budget** will support high visibility means of getting the name of the program in front of residents. The towns have used Sandwich Boards on Town Commons, Banners, and Posters in town offices, libraries and local eateries. Name recognition is important in building interest. These large yet simple announcements will build the branding (HeatSmart) needed to get conversation going about the program.

Bolton ran a survey asking residents how they learned about their Solarize program and learned that the local newspaper, signs/banners and information from friends/neighbors were more effective than other means. We will keep this in mind as we strategize what is the first and best way to educate residents about the HeatSmart program.

One-on-one interactions: We understand that face-to-face interactions are the most effective marketing effort in converting interest in the HeatSmart program to actual homeowner adoption. There are numerous events and places in the towns for HeatSmart volunteers to meet local residents and talk about the program.

- Early Adopters become HeatSmart Volunteers: We will ask early adopters to be spokespersons for our program, by asking them to tell their friends and neighbors, become a volunteer at local gatherings such as the Transfer Station, Town meetings, or sports events and to allow us to use their name as a reference for others who might consider the program. The early adopters one on one personal experience will go a long way to selling the program.
- Follow-up to Marketing Events: Given the marketing avenues noted above, we expect many of these events to lead to one on one interactions about the programs. We will create some Frequently Asked Questions materials for Volunteers to use in one on one discussions, and have at least several volunteers available by phone or email to answer questions from residents.
- Outreach to low – moderate income residents: Harvard and Bolton are middle class communities and recognize that there is a smaller than average percentage of low- moderate income residents, mostly seniors who have been in the communities for many years and live on fixed incomes. We will reach out to these individuals through our Councils on Aging. We will need help from MassCEC and the installer to determine what low cost options would be available and the payback periods (as our initial research shows payback is longer than Solarize Mass).

Given the success both communities had with the Solarize Mass program, we expect that we can have similar outcomes for HeatSmart. We have learned from these past efforts and expect we will have a similar experience and outcome.