

- Describe ways in which a joint marketing strategy between the municipality, the volunteer team, and the selected Installer could increase the number of sign-ups for a clean heating and cooling site assessment and expanded adoption within the community.
- Provide a plan for implementation, including methods to engage additional community members and volunteers.
 - This could include an outreach activity timeline, expected volunteer activity hours, preliminary goals for community participation and clean heating and cooling adoption during the program.
 - Include a description of what types of marketing and outreach channels will be employed.
 - Include information on where community events could be held, including the Meet the Installer community meeting.
 - Consider including specific strategies to target low- and moderate-income residents as part of the marketing and outreach plan.
- If the Community chooses to include more than one clean heating and cooling technology in the HeatSmart Mass campaign, discuss how the volunteer team will promote multiple technologies.

For examples of past marketing proposals for Solarize Mass program available at <http://www.masscec.com/get-clean-energy/residential/solarize-mass> under the Program Background tab.

Joint Marketing Strategy

The key strategies underlying our marketing and outreach plan are outlined below.

Community-Based Social Marketing

Underlying our marketing strategy are the principles of Community-Based Social Marketing, developed by Doug McKenzie-Mohr. The emergence of community-based social marketing can be traced to a growing understanding that programs that rely exclusively on media advertising or providing information can be effective in creating public awareness, but are limited in their ability to foster behavior change. Community-based social marketing draws heavily on research in social psychology, which indicates that initiatives to promote behavior change are often most effective when they are carried out at the community level and involve direct contact with people. Personal contact is emphasized because we are most likely to change our behavior if we see that behavior as widely accepted and socially supported.

The principles of Community-Based Social Marketing provide a systematic approach to identifying the barriers and benefits associated with the purchase of ASHPs and using behavior-change tools to address key barriers. Behavior-change tools that we will use include:

- Identify those most likely to benefit
- Make action easy
- Social and financial incentives
- Make commitments public
- Support of key influencers
- Coaching by role models
- Tailored and vivid communications
- Feedback about the impact of homeowner actions on their families and communities.

Target Audiences

We view home energy audits as one of the most promising ways to identify and target our audience. Using data from past and ongoing home energy assessments, we will identify and target the following groups whom we believe to be the best candidates for ASHPs. Target audiences include residents who:

- **Heat their homes with oil, propane or electric resistance heat**
- **Have already taken action to reduce their energy use.** Households that have had home energy audits, installed solar, added installation, or purchased hybrid or electric cars are more likely to be interested in additional ways to mitigate climate change, and be in a good position to influence their peer groups.
- **Are particularly concerned about fuel prices.** Low- and moderate-income homeowners are most vulnerable to increases in fuel rates.

Tailored, Vivid Communications

All messaging will be easy-to-understand and empowering to make action easy. When possible, these messages will be communicated through real life stories of peers—these are often the most compelling. Communications will address the key issues outlined below.

Comfort & Health of Families. Many residents will be drawn to ASHPs as a way to provide year-round comfort, low-guilt air conditioning, and reduction of mold and airborne pollutants.

The Power of Our Community to Mitigate Climate Change. Concerns about climate change are high in our communities and many people want to be part of a community effort to reduce emissions. This population is likely to weight environmental impacts highly in their purchase decisions.

Return on Investment. Many in our communities also bring an investor’s mindset when purchasing heating and cooling systems. We recognize challenges with projecting an ROI when usage patterns vary widely, weather is unpredictable and fuel rates are in flux. Other financial benefits will be emphasized including increased housing values for homes with heat pumps and other energy saving technologies.

Affordability. The up-front costs of ASHPs are considerable, and are only realistic for low- and moderate-income families if no- or low-interest loans, bulk-purchase discounts, and rebates provide an affordable solution.

Effective Program Management, Communications, and Continuous Improvement

We have secured a Lead Coach who has demonstrated highly effective program management skills through decades of program management experience. We will leverage that experience to ensure efficient use of resources, adherence to the marketing and outreach plan, full engagement with MassCEC and the Technical Consultant, and continuous improvement throughout the Program. Key elements include:

- Leverage the technical and marketing expertise of MassCEC and the Technical Consultant, including their past and ongoing experiences with Solarize Mass, Solarize Plus, and Heat Smart Mass to continually improve our approach throughout the program
- Engage the installer to:
 - Review our marketing plan and provide ongoing feedback
 - Ensure we deliver accurate and relevant information to our residents
 - Leverage the installer’s technical and marketing expertise
- Leverage the combined resources of the three participating towns to gain greater impact per volunteer-hour and per dollar spent.

We will hold Team meetings biweekly to review status, coordinate activities, and identify appropriate adjustments/corrective actions. These are in addition to status update calls with MassCEC and the Technical Consultant.

Securing Additional Volunteers

The energy committees for each town, as well as several other organizations noted in Table 2 above, have offered to help secure additional volunteer resources, as needed, throughout the Program.

Proposed Program Goals

Table 3 summarizes our proposed goals for ASHP installations under the Program. We derived these goals based on past experience with solar and weatherization programs (adjusting for differences in technology awareness levels), and the estimated size of the target market—our goal represents roughly 5 percent of the target market for ASHPs. We are confident that installations accomplished through HeatSmart Mass will help seed long-term growth of the heat-pump market in our towns.

Table 3: Proposed ASHP Installation Goals

Metric	Concord	Lincoln	Carlisle	Total
Number of Outdoor Units	65	20	20	105
Heating Capacity (kBtu/hr)	1600	500	500	2600

After Program award, we will review these goals with MassCEC and the Technical Consultant, and revise them as appropriate.

Implementation Plan

Outreach activities will intentionally employ tactics effective in community-based social marketing campaigns as outlined below. In particular, we will engage trusted messengers and opinion leaders to help establish a norm that clean heating and cooling is prudent and fashionable.

Specific Marketing Efforts for Low- and Moderate-Income (LMI) Residents. Using census data and American Factfinder, we estimate that LMI residents comprise roughly 35 percent of the population in Concord, 34 percent in Lincoln, and 24 percent in Carlisle. We will promote Heat Smart Mass for this population through communications and agencies that directly target this population. The Concord Municipal Light Plant (CMLP) offers a 120% Income-Based Rebate and 80% Income-Based Rebate in amounts identical to those offered by MassCEC, in addition to offering a base rebate. CMLP makes the 80% Income-Based Rebate available to any household meeting the income eligibility criteria, not only households replacing or supplementing existing electric resistance heating systems. Information on CMLP's ASHP rebates can be found online at <http://www.concordma.gov/1873/Air-Source-Heat-Pump-Rebates#what>.

The Concord Council on Aging and the Concord Carlisle Community Chest, organizations with missions to strengthen our communities through helping those in need, have agreed to help us inform and educate LMI residents about the Program. The Lincoln Council on Aging, which also administers emergency funds for Lincoln residents, has offered to help us reach out to LMI households. We will post notices and hold workshops at condominium developments that house many LMI residents. Lincoln's housing commission invited us to present to their board to explore ways the commission can support HeatSmart Mass.

No-cost weatherization measures are available to certain LMI households in Concord, Lincoln, and Carlisle. We will work with the following non-profit organizations that oversee LIHEAP weatherization programs to inform them of our Program and request their assistance to target LMI households:

- South Middlesex Opportunity Council (for Concord and Lincoln)
- Community Teamwork (for Carlisle).

Further, after Program award, we will explore with MassCEC whether prospective installers can be given additional consideration if they offer special pricing to LMI households or offer a low-cost or free ASHP to one or more LMI households after achieving specific installation thresholds under the Program.

Educational Events and Tabling throughout the Program. We will hold five meet-the-installer presentations throughout the sign-up period. We will supplement this with tabling at places where large numbers of people tend to gather such as transfer stations, town meetings, parades and other town celebrations, local businesses, and Back to School Nights.

Partnering with Schools and Faith Communities. Our Interfaith Community and Public School partners have agreed to help us:

- Promote the program through communications that target their members
- Co-sponsor, promote and host events
- Publicize the support of key leaders
- Involve young people in educating parents.

Working closely with the installer to provide easy-to-understand, accurate and relevant information to our residents.

Neighbor-to-Neighbor Coaching. Residents who have ASHPs in their own homes will be available to assist neighbors through the decision making and installation process, and host open houses. These "role models" often provide the reassurance needed to help consumers move forward. We have lined up volunteers in each town who have offered to host open houses, and we will recruit additional volunteers as we install ASHPs under the Program.

Communication Channels

All three towns will distribute information through the following channels. Over the course of the Program, we will distribute multiple communications, emphasizing appropriate messaging throughout the Program:

- Local newspapers
- Electronic newsletters (schools, faith communities, community groups)
- Energy committee web site (CoolerConcord.org, LincolnGreenEnergy.org)
- Heat Smart Website. We will use a single HeatSmart website for all three municipalities, allowing us to

maximize the benefit of this important investment. We anticipate hiring a professional website designer to help ensure an appealing look and user friendliness.

- Facebook:
 - Cooler Concord Facebook page: <https://www.facebook.com/coolerconcord/>
 - Concord Town Facebook page: <https://www.facebook.com/concordmass>
 - Green Carlisle: <https://www.facebook.com/Green-Carlisle-MA-1470386046595367/>
- Community TV
- Communications to targeted audiences using existing email lists (e.g., Carlisle Solar Challenge participants, Cooler Concord Fair attendees, customers who had recent home energy audits, Concord Green Your Heat participants, CMLP electric heat customers, CMLP solar customers, Lincoln’s Green Energy Committee contact list)
- Direct-mail postcards
- Posters in key business and community establishments
- Lawn signs in Concord and Carlisle.

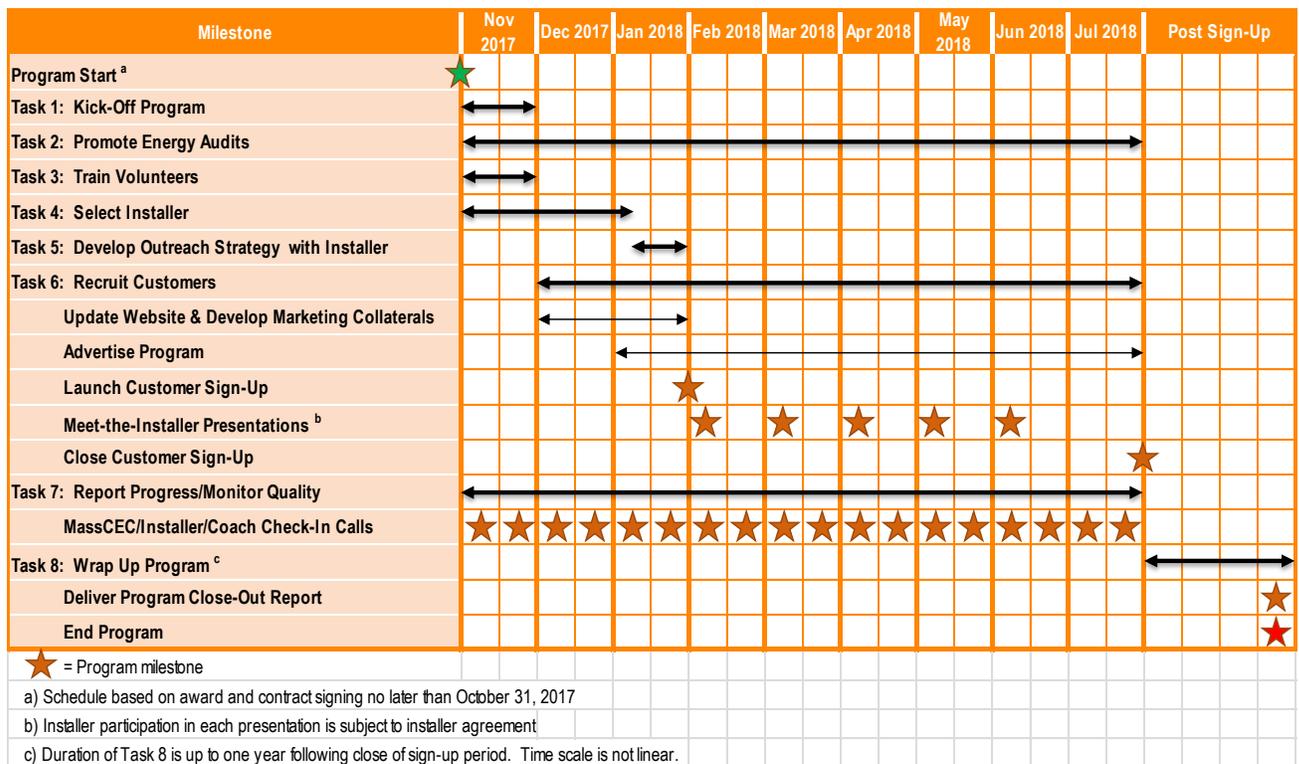
Ongoing Evaluation of Marketing Strategy and Implementation Plan

We will ask and document how participants heard about the HeatSmart Program. We will summarize this data monthly, and use it to inform/adjust our marketing activities for the subsequent month, as well as to adjust the overall plan or messaging, as needed. Participant action often results from repeated messaging or activities in one’s social group, so it is difficult to definitively attribute participant action to any one activity or communication.

Implementation Timeline

Figure 1 shows the preliminary program timeline, including the implementation plan. We provide further details below.

Figure 1: Preliminary Program Timeline, Including Implementation Plan



Task 1: Kick-Off Activities (First Month)

Upon program award, we will publish notices of program award and timing, and encourage residents to request home energy audits, through:

- Articles in local newspapers

- Announcements on town websites, energy committee websites, and through the online newsletters of supporting organizations
- Posters in libraries and Town Halls
- Initiate design of HeatSmart Mass website.

We will meet with MassCEC and the Technical Consultant to review our proposed marketing plan (including goals) and make revisions based on inputs received to maximize the effectiveness of our efforts. In addition, we will complete other kick-off activities consistent with the recommendations outlined in Attachment F of the RFP.

Task 2: Promote Energy Audits

The CMLP (Concord) has agreed to:

- Promote home energy audits in Concord after Program start through the sign-up period
- Provide HeatSmart Mass collaterals to good ASHP candidates during energy audits, and have auditors talk with homeowners about CMLP's ASHP rebates and the opportunity to participate in HeatSmart Mass.
- Request permission from good ASHP candidates to follow up with them. *The CMLP will conduct follow up using its own staff.*

Carlisle and Lincoln Team members will seek support for promoting energy audits from:

- Eversource, the utility serving Lincoln and Carlisle. Eversource informs us that it is open to having such discussions post-award.
- Mass Save
- Mass Save home energy auditors. Lincoln has proven the effectiveness of this approach through its ongoing Home Energy Challenge.

In addition, we will directly encourage residents to obtain home energy audits through the outreach channels available through the supporting organizations listed in Table 2 above. We will launch an initial version of the HeatSmart Mass website to help promote home energy audits and capture contact information for residents who are potentially interested in ASHPs.

Task 3: Train Volunteers

All Coaches will participate in the HeatSmart volunteer training activities as outlined in the RFP. We anticipate that many of the additional volunteers on our Team will participate as well.

Task 4: Select Installer

Upon Program award, we will begin developing installer selection criteria, and communicate to MassCEC any suggestions we have for the installer RFP. In addition, we will participate in selecting the installer as outlined in the RFP.

Task 5: Develop Outreach Strategy with Installer

Once identified, we will meet with the installer (preferably, at the installer's place of business) to:

- Become familiar with the installer's products and services, in particular, those offered through HeatSmart Mass
- Clarify all aspects of the installer's offer
- Meet the installer's key staff and develop a rapport
- Review the key HeatSmart Mass objectives
- Understand how the installer will ensure quality equipment sizing, selection, and installation, and establish a plan for quality assurance
- Obtain installer input on our marketing strategy and implementation plan, and update both to reflect those inputs
- Obtain installer commitment to support the implementation plan.

Task 6: Recruit Customers

Starting about two months before the start of the sign-up period, we will begin outreach, with the help of our partner organizations, to recruit customers and promote sign-ups, including:

- Announcing the sign-up period
- Publishing a schedule for the first 2 – 3 meet-the-installer presentations
- Contacting target candidates identified through home energy audits

- Scheduling ASHP open houses
- Scheduling tabling events at Lincoln and Carlisle transfer stations and local businesses
- Designing and printing direct mailing materials, posters, and lawn signs
- Updating the HeatSmart Mass website
- Coordinating outreach through key supporting organizations, in particular, schools and faith communities.

All three municipalities will use the same designs for printed materials to the extent practical to minimize printing costs and simplify outreach efforts.

During the sign-up period, we will step up our outreach efforts with the help of our partner organizations, including

- Launching the updated HeatSmart website
- Distributing lawn signs in Concord and Carlisle
- Issuing two direct mailings to residents
- Communicating with targeted audiences using existing email lists
- Posting notices in public buildings and outdoor sandwich signs
- Publishing announcements in local papers, online newsletters, and website posts
- Announcing schedule for remaining meet-the-installer presentations and home tours
- Staffing tables at transfer stations, local businesses, and community events to distribute fliers and answer questions.

Understanding the importance of direct contact with our community (see discussion above about Community-Based Social Marketing), we recommend heavy emphasis on community presentations, where the installer, Coaches, and other community volunteers can interact with attendees. We anticipate hosting five meet-the-installer presentations during the sign-up period. We will encourage the installer to have a table with relevant marketing materials and sample indoor and outdoor units for inspection at each presentation. If the installer is unable to attend a presentation, one or more of the HeatSmart Coaches will deliver the presentation (with MassCEC's prior review of the presentation materials). Each presentation will be open to residents of all three municipalities. We will vary the locations of presentations to accommodate residents of all three municipalities. Table 2 above lists the key organizations that can host presentations.

Task 7: Report Progress/Monitor Quality

In addition to the communication and coordination activities discussed under other tasks, we will set up a schedule for bi-weekly check-in calls with MassCEC and the Technical Consultant. Once we have selected an installer, we will revise the call schedule, if needed, to accommodate the installer.

In addition to bi-weekly check-in calls, the HeatSmart Coaches will be available for impromptu email and phone discussions to discuss progress, review approach, and take corrective actions, if needed.

Task 8: Wrap Up Program

After the sign-up period ends, we will conduct the following activities to facilitate completing all installations and to document the program.

Facilitate Remaining Installations. We will work closely with the installer to understand the schedule for all outstanding installations. If we identify potential delays associated with customers, we will, with the installer's consent, contact each customer to offer assistance and answer any questions. If we identify potential delays associated with the installer, we will discuss with MassCEC and the Technical Consultant to determine the best approach to resolution.

Evaluate Program and Provide Feedback. We will evaluate the program, including documentation of:

- The extent to which we achieved program goals
- Any unanticipated benefits
- Lessons learned—what worked well, what did not, and why
- Recommendations to MassCEC for changes that will increase the effectiveness of potential future programs.

Marketing Budget

Identify a preliminary marketing budget of up to \$9,000 community marketing grant. The budget should detail whether the Community plans to provide a stipend (of up to \$1,000) to the HeatSmart Coach.