

Marketing Best Practices for Project Managers

Recruiting General Market Customers

Developing a Marketing Plan

Identify Outreach Partners:

- Work with community organizations, partners, or affiliates that can assist with lead generation. This is helpful for targeting specific audiences or communities that would benefit most from your project.
- Work with a customer lead organization or affiliates that are willing to advertise to their networks.

To learn more about outreach to low-income customers, reference the low-income outreach best practices section.

Customer Acquisition

Develop marketing and engagement strategies to target potential subscribers:

Digital outreach activities:

- Newsletters
- Email blasts
- Social media outreach

Direct customer activities:

- Door to door marketing
- Presentations and workshops
- Industry/partnership engagement

Marketing Dos and Don'ts

DO:

- Include program disclaimer on all materials
- Prior to pre-certification - represent all projects as pending OPUC approval in all materials.
- Clearly disclose all pricing and payment options and terms, including any financing offers, as well as future price changes or escalators and the availability period for any special offers.
- Provide objective evidence in support of all claims and provide assumptions regarding bill savings.
- Abide by program marketing rules, code of conduct, and guidelines for logo use and branding

DON'T:

- Refer to any subscription product where the participant provides any sort of payment to the project manager as “free.” *E.g. “Sign up today to receive free solar!”*
- Make promises or guarantees regarding performance or savings that are not included in customer contracts. *E.g. “Guaranteed to cut your energy bill in half!”*
- Promote a project prior to project manager registration.
- Promote a project prior to precertification without stating that it is pending OPUC approval.

If PMs are concerned about using specific language in their advertising and messaging, verify language with the Program Administrator.

Outreach Material Design

PMs may use existing materials already created by the PA team and the LIF. This includes flyers, brochures, videos, presentations, etc. It's perfectly alright to make materials in MS word or MS Publisher—even without a design team you can make simple, thoughtful content.

- Say it with fewer words.
- Bullet points can reduce redundancy
- Keep logos at the top or bottom of the page, not the middle
- Do not use more than two types of font (not counting logo fonts)
- San serif font (letters without small “feet) are good for bullets and headers
- Use serif font for paragraphs. The “feet” make text easier to read.
- Try not to go below 12pt font for anything other than disclaimers
- Do not use more than two sizes of font
- Do not use more than two colors of font
- Read sentences out loud to be sure they make sense
- Use either bullets or numbers for lists
- Use inclusive, realistic photos of people. A photo tells a person if a program is made for them or not.
People in posh homes with white walls and carpeting, massive yards, high-end clothes, etc is not something that will be relatable to most low-income people.
Translated materials should have pictures of people representative of the language.

Media

- Reach out to local media where panels are physically located. Small / rural media is often much more responsive as they have fewer exciting things happening within their scope of interest, though they have smaller reach.
- Advertising in newspapers that target the communities you're interested in can build a relationship with those papers and make them more inclined to report on you.
- Social media, especially post-COVID, is an enormous news source for rural communities.

Recruiting Low-Income Customers

Relationships with Community-Based Organizations (CBOs)

Examples of CBOs to connect with:

- Multi-family housing
- Energy Assistance
- Department of Human Services
- College campuses (FAFSA)

Building Connections / Trust Building:

- Does your program help them meet their mission?
- CBOs are often over capacity meeting the goals of multiple funding sources. Be patient and flexible as it's not their job to help do outreach for your project. They may take time to get back to you. They may want to partner but not have actual capacity to do so
- If CBOs are generating leads, consider making a general donation to them (many pay firms for their leads but do not pay nonprofits) to help them cover their overhead costs
- Be honest and clear about the pros AND cons of the program
- Utilize CEP - we are an experienced nonprofit organization that works with LI communities and will do income verification and education for participants as well. CEP can provide presentations to CBO's about the program and is available for follow-up questions about the LI experience, verification process, etc.

Messaging for Low-Income Participants

Community Solar is new and we are ourselves learning what works and what does not. But we've found that differentiating community solar from rooftop solar is one of the key components to getting attention (at least in person) and so we've been leading with messaging that won't cover every single customer, but gets the attention of new audiences.

Here are some messages we've found resound with CBOs so far:

"Solar for Renters"

"Solar you can take with you"

"Save money, save the environment."

Multi-Family Housing, Utility Allowances

Many forms of low-income housing have complicated, long-existing programs that interact directly with bills for those residents. CEP may request more information from certain housing providers, so that we can provide the information LI participants may need to make informed decisions. There are a couple of things to consider—one being whose name is on the meter, and how the program might interact with existing programs.

Whose name is on the meter: For participants to sign up for a program, the meter must be in their name, not property owners.

Three common MFH scenarios:

In some cases, signing up for community solar might cause harm or confusion.

Scenario 1: Section 8 vouchers

Likely no impact. It is illegal to discriminate against section 8 holders, and those on section 8 could live anywhere. In Multnomah County alone there are approximately 9,000 people.

Scenario 2: Tax Credit Buildings (OHCS has a list)

Rent is not based on actual incomes, but rather income brackets. 90% of these buildings use the same system as section 8 vouchers. Chart allowances are so generous that it's unlikely to hurt the LI subscribers, especially in older building. This may be an issue in newer housing where the energy allocations will be less generous because of high efficiency. If the housing provider itself is doing the project, as they may do a building-wide utility assessment that may change the rates. If rent is impacted, money will go to the housing provider.

Scenario 3: Section 8 Housing – direct contract with HUD

Red flag! Even if a portion of tenants had community solar – rent could go up for the entire building because they work with averages. Money would go directly to HUD, bypassing individuals as well as the housing facility itself. This is not a common scenario – but HUD has a list of these properties.