



**New Jersey's Clean Energy Program
Fiscal Year 2018
Outreach and Interim Marketing Plan**



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Outreach Plan

On July 13, 2016, the TRC Team initiated outreach deployment as described in *Enhanced Outreach Plan for Program Administration and Management Services, New Jersey Clean Energy Program*. The FY18 Outreach Plan updates and replaces the original plan based on experiences in FY17 and feedback from BPU staff and stakeholders.

The TRC Team has developed a comprehensive Outreach and Interim Marketing Plan for FY18 which describes activities for deploying efforts essential to supporting NJCEP participation.

Enhanced Outreach Plan Summary

The Enhanced Outreach Plan (Outreach Plan) will continue efforts deployed in FY17 and will support NJCEP participation throughout the State. The Plan will continue to incorporate best practices from the Team's experience nationwide while making adjustments based on Plan implementation experience and growth. As stated in the original Plan, the Team will continue to "implement a reasonable and solid structure that provides flexibility as individual programs evolve".

Program-wide Outreach Themes

The Outreach Team supports the entire NJCEP offering. While some outreach themes are unique to particular markets, there are multiple themes that resonate across the all sectors. These include:

- Focus on completed applications
- Outreach Goals with monthly and annual targets
- Facilitate Commissioner participation in speaking engagements for trade organizations, trade shows, and customer meetings
- Coordinate outreach efforts with BPU Ombudsman's Office, and grantees
- Account Management Outreach
- Refine event outreach strategy and prioritize events ensuring equality across residential and C&I sectors and maximum benefits
- Leverage team cross promotion
- Leverage relationships with various organizations where NJCEP has membership to share NJCEP message
- Refine tailored education for sectors such as architectural, and homeowners through speaking engagements and web based training via the Clean Energy Learning Center (CELC)
- Coordinate outreach with all New Jersey Utilities

Focus on completed applications

Promoting energy savings is a primary objective of NJCEP by providing "financial incentives and support for energy efficiency (EE) technologies, distributed energy resources, and solar renewable energy."¹ The Enhanced Outreach primary mission is to engage and educate homeowners, business customers, trade allies and stakeholders to drive participation in NJCEP by implementing EE measures and submitting applications to the Program. The Outreach Plan describes the initiatives

¹ *New Jersey's Clean Energy Program Fiscal Year 2018 Program Descriptions and Budget, Energy Efficiency and Renewable Energy Program Plan Filing for Fiscal Year 2018, TRC, June 28, 2017*

and actions we will implement or explore in FY18 to accomplish this. As Residential and C&I markets differ, the Outreach Plan tailors strategies and goals to each market as described in respective sections.

Outreach Goals with monthly and annual targets

The Outreach Plan establishes monthly and annual targets for various key performance indicators (KPI) separately for Residential and C&I efforts. These KPI are designed to measure specific actionable items over the course of FY18 that will drive program participation. The monthly targets are established as a guide to reaching the annual targets, but we anticipate that monthly performance will fluctuate above and below the target.

The Team will capture and corroborate KPI data through the NJCEP Customer Relationship Management (CRM) tool launched in FY17 and the Residential and C&I program databases. The CRM provides tracking of Outreach activities, contact information, event participation and project progress available in real time to the entire Outreach Team.

Facilitate Commissioner participation in speaking engagements for trade organizations, trade shows, and customer meetings

The Team will specifically research, share and support potential speaking and promotional opportunities for participation by Commissioners. These engagements may include stakeholder meetings, presentations to trade organizations, panelist opportunities at trade shows, meetings with large energy use or strategic participants, ribbon cutting ceremonies for completed projects and customer acknowledgment for milestones achieved. The objective of Commissioner participation is to further support NJCEP and demonstrate program enthusiasm across the BPU. Commissioners will receive feedback first hand from program participants and stakeholders related to the program participation experience.

Coordinate outreach efforts with BPU Ombudsman's Office, and grantees

Coordination across the various outreach teams supported by the BPU such as the Ombudsman's office, and grantees such as Sustainable Jersey and NJIT's Clean Energy Learning Center is important for providing consistent messaging to the rate payers across the various NJCEP paths. In FY17, the Outreach Team conducted regular, but separate contact with these various organizations to discuss specific events, speaking engagements and presentation content. In FY18, the Outreach Team will explore combining these separate meetings into a regularly monthly meeting with all organizations and through one central point of contact at the BPU. The Outreach Team will coordinate with these other groups to share event and speaking opportunities, and minimize duplication.

We will work closely with the Ombudsman's office to support and monitor cross-team outreach efforts like NJCEP promotion on cable community access channels in various townships statewide. We will explore tracking efforts such as using vanity URLs and specific phone numbers to capture customer reaction and engagement resulting from promotional campaigns.

Account Management Outreach

Account Management remains the cornerstone to supporting the broad arch of the Outreach Plan to encourage Program participation and drive toward submitted applications. Based on continuous feedback since Team deployment, we know potential applicants and trade allies benefit from Account Manager assistance to guide them toward the appropriate NJCEP path and help them align

project plans with potential incentives. Account Managers tailor engagement to participant knowledge and expertise and share techniques and equipment knowledge best suited for each unique project.

In FY18, we will focus C&I Outreach efforts on one-on-one meetings with potential program participants while also leveraging trade allies and other stakeholders who can help deliver information about the programs to their customers. These one-on-one customer meetings will focus on larger potential opportunities that will bring in the most energy savings and most likely be targeted towards the C&I sector.

Account Managers will offer strategic program education to various trade, certification and civic organizations as needed to educate people about NJCEP participation paths and benefits. We will provide education in the form of presentations detailing Program features and benefits, while formal trade ally certification, technical and application preparation training will be provided separately.

Refine event outreach strategy and prioritize events ensuring equality across Residential and C&I sectors and maximum benefits

In FY18, we plan to take a very strategic approach to choosing events (as presenters or exhibitors). We will analyze the yield of events attended in FY17 to review cost and available resources vs. results. We will also gather input from BPU Staff on what events have been most successful. Previously successful events will be measured by the number of qualified leads obtained at specific events and/or the number of attendees at NJCEP presentations during these events. Beginning in FY18, we will also track the quantity of people visiting the NJCEP booth for future evaluation.

Leverage Team Cross Promotion

Building upon practices begun in FY17, the Outreach Team will focus their efforts on opportunities that promote the Program across Residential and C&I markets, most effectively. As demonstrated while participating in various events, the Team understands that participants at seemingly specific C&I or Residential events may have interests or needs across both markets. For example, a Chamber of Commerce member may also have a home where they would like to improve EE. And a Residential customer at an Earth Day event may own a business that requires EE upgrades.

Each of the Account Managers is cross-trained in both Residential and C&I programs and able to initiate a conversation with a potential participant by sparking their interest and generate a potential lead. Account Managers maintain inventories of collateral they can use to distribute to prospects.

Leverage relationships with various organizations where NJCEP has membership to share NJCEP message

The Outreach Team has identified, or continued memberships in, various organizations statewide to network with and promote NJCEP to organization participants. Many organizations will share mailing lists with the Outreach Team, forward program information to their constituents at no cost, or include information in their membership newsletters. We will leverage these memberships to help distribute NJCEP information and updates.

Refine tailored education for sectors such as architectural, and homeowners through speaking engagements and web based Clean Energy Learning Center (CELC)

In FY18, the Outreach Team will continue its focused educational efforts with several objectives: (i) engage membership organizations to discuss their plans and participate in NJCEP; (ii) have Account Managers participate in key monthly association meetings to provide access and support to the memberships; and (iii) educate homeowners on the benefits of implementing EE measures.

We will explore the most appropriate groups to target such as the builder and contractor community. These educational efforts may be modified for webinars developed and managed by the Outreach Team and on-demand recordings through the Clean Energy Learning Center in cooperation with NJIT.

Coordinate outreach with all New Jersey Utilities

In FY18, we will collaborate with utilities regarding monthly NJCEP promotion through utility electronic publications and community events. In an effort to proactively promote NJCEP, the Outreach Team will coordinate with the implementation teams for various Programs to identify the best communication cycles for each program and prepare promotional language approved by BPU Staff. We will offer Program presentations and support in customer meetings to utility account reps and customer service specialists to support their efforts to educate their customers about NJCEP.

Residential Program Focus

During FY18, the residential outreach efforts will continue to focus on maintaining and expanding the relationships with HVAC equipment manufacturers and distributors, to identify those potential contractors that have the aptitude and resources to expand their business scope and participate in the Programs, specifically the *WARM*Advantage and *COOL*Advantage programs and Home Performance with ENERGY STAR®. In addition, the Account Managers will seek new builders that can build above IECC 2015 to ENERGY STAR Homes or Zero Energy Ready Homes (ZERH). A new focus for FY18 will be to reach the remodeling industry and encourage remodelers to participate and promote the above-mentioned programs. The Account Managers will continue to promote the programs at events and trainings prioritized by the BPU and the Outreach Team and those that can result in most opportunities equating to trade ally conversions and applications.

While the main goal is to expand contractor and builder participation, the Account Managers will serve as an ongoing resource to contractors and builders as they will provide useful guidance, helpful tools and tips to navigate the process of becoming a participating trade ally. The Account Managers will provide information regarding upcoming trainings, technical information when asked, and also may be used as a resource for sales and marketing information to help the contractor become successful at bringing in applications and completed projects into the programs.

Cooperative (co-op) marketing will serve as an incentive to become a participating trade ally. This supportive platform helps contractors target homeowners directing them to their company and respective NJCEP programs they serve. Co-op marketing and any outreach conducted to educate the homeowner ecosystem will also be heavily researched and explored. NJIT's Customer Journey will serve as a useful, educational tool for New Jersey's residents and will be featured on NJCleanEnergy.com and communicated through social media and the monthly newsletter.

FY18 Strategies

- Co-op marketing
- Maintain and expand Manufacturer/Distributor relationships
- Establish Builder Connections
- Educate Homeowners
- Promote the Customer Journey
- Explore outreach Efforts to the Remodeling Industry

Co-op marketing

The Co-op Marketing program offers cost sharing for pre-approved advertising placed by contractors participating in Home Performance with ENERGY STAR. Each contractor may receive

up to \$50,000 per fiscal year in co-op reimbursements. The advertising is reimbursed at a percentage of the total cost of the ads. In the case of HPwES the percentage amount is 50%.

Co-op gives a contractor the opportunity to use various methods to reach homeowners in the territories they serve. Not only are they promoting NJCEP programs through their ads, but they are enabling prospective customers to reach their businesses directly by providing a direct point of contact. Co-op advertising also sparks potential business to other contractors because customers are told to contact at least three contractors to find out what they offer. One contractor advertising the program in their territory also potentially increases awareness and leads to customers contacting other contractors in that same area sparking fair competition in the marketplace. It is important to note that the Program, the BPU, or its partners cannot recommend any contractors; therefore co-op marketing is the gateway to first level outreach and is an effective way to reach prospective customers.

Maintain and expand Manufacturer/Distributor relationships

The plan for FY18 is to continue to develop manufacturer/distributor relationships as they are a common resource for HVAC contractors. HVAC manufacturer and distributor facilities are spread out across New Jersey. For example, one distributor can have several branches throughout the state. The HVAC manufacturers and distributors sell their products to HVAC contractors and also host technical trainings at their facilities. The goal is to reach these HVAC contractors through the manufacturer and distributor facilities and provide them with information regarding our programs, specifically HVAC and Home Performance to encourage their participation as a trade ally. The enhanced outreach team accomplishes this by visiting these branches and speaking with the branch managers, providing our program information to display at their counters and also identifying opportunities to speak in front of the HVAC contractors whether be at trainings or events. We will also continue to use any opportunity to present at the northern and southern chapter of the NJ Air Conditioning Contractors Association (ACCA) monthly meetings in addition to speaking in front of contractor groups, e.g. at NJCEP and utility sponsored trainings, contractor program update trainings, other technical trainings, etc.

Each Account Manager is given time prior to each technical training to provide an overview of the programs. By attending the trainings in person, the team has the opportunity to meet potential contractors and collect their contact information to follow up with more details regarding the programs. While we are focusing on residential outreach, the slide deck includes information regarding the Commercial and Industrial (C&I) programs. The residential Account Managers will forward any contacts they meet who are interested in the C&I programs to the C&I Account Managers. The team will make every effort to cross promote the programs.

Establish Builder Connections

While we have seen successful completions under the ENERGY STAR Homes Program, our efforts in FY18 will also focus on building awareness of the ZERH standards in order to increase participation levels. Outreach will be conducted to custom builders, who express interest in building ZERH. The key is to raise awareness about ZERH, so the custom builder lets the rater know they want to build to that standard. We will leverage partner groups and memberships, e.g. Shore Builders Association, to reach custom builders and look for opportunities to educate them about ZERH and also help identify potential partnerships with remodelers, sub-contractors or associations such as an affordable housing alliance, which may provide financial and design support of a project.

Educate Homeowners

Homeowners continue to be a target market for the residential EE programs. In FY17, teaming up with partners at lighting fairs proved to be successful. After a customer purchased their LED kits,

an Outreach Team member approached the customer to describe all of our residential EE programs. This “hands-on” educational approach should continue to raise more program awareness because we are engaging the customer, who is the decision-maker.

Events especially relating to sustainability and EE to engage customers will be explored in FY18. We will also explore speaking opportunities where we can reach larger audiences to present about the programs. Additionally, we will make sure to leverage and coordinate any speaking or event engagements with the BPU, utilities, Sustainable Jersey and other partners.

The team will network with the Property Owners Association of NJ to schedule speaking opportunities to discuss the full breadth of what the NJCEP programs offer regarding multifamily incentives. This association has a wide array of property owners that may benefit from the programs.

Enhanced Outreach has been connecting with municipalities via municipal clerks, communications staff, etc. to determine if the townships will agree to showcase NJCEP content wherever they find helpful to reach their residents, e.g. via the municipal website, via social media, postings at municipal buildings, e.g. libraries, town hall, etc. We will also work with the BPU to leverage program information through local government access channels.

Promote the Customer Journey

As part of the NJIT Clean Energy Learning Center, a customer journey will be developed in FY18 and used as an educational tool, featured on NJCleanEnergy.com. The goal is to illustrate the importance of achieving comfort, safety and durability in homes and stress the health benefits associated with EE. The journey will also link the recommended solutions to the available NJCEP residential program offerings. The enhanced outreach team will use this as a tool when promoting the programs to potential customers, so they obtain a more in-depth description of the steps to EE.

Explore outreach Efforts to the Remodeling Industry

The Outreach Team will support HPwES focusing on the remodeling industry by recruiting remodeling contractors, informing them about the program’s available incentives, and identifying potential partnerships. Account Manager efforts to recruit within the remodeling sector will build off of currently successful Outreach efforts with supply houses and HPwES contractors. The remodeling industry has a different pool of potential contractors to promote EE, so depending on their area of expertise they may be candidates for HPwES, HVAC or Residential New Construction programs.

Residential Goals – Monthly and Annual Targets

The Residential Enhanced Outreach goals will focus on recruiting new trade allies (contractors and builders) to participate in the HPwES, HVAC, and RNC programs. Once enrolled in the programs, we will measure how many applications/projects each contractor is contributing to the programs on a monthly and annual basis.

- Number of Trade Allies Recruited
- Applications received attributed to Outreach

Number of Trade Allies Recruited

The goal for the number of trade allies recruited is a combined target for HPwES, RNC and HVAC, and will be based on identifiable Account Manager activities related to the trade ally prior to participation. The three different residential programs have different requirements for enrolling

trade allies. In FY18, we will identify recruited trade allies through one of three methods depending upon the program.

1. HPwES: Count contractors as recruited once they have completed the program overview training and signed a participation agreement;
2. RNC: Count builders as recruited trade allies after they submit their first application through RNC;
3. HVAC: Count contractors as recruited trade allies after their first submission of an application through *WARM*Advantage or *COOL*Advantage.

Trade ally enrollment across residential programs varies greatly as the timing depends on seasonality and how busy contractors and builders are with their current work. For example, Home Performance requires special, labor-intensive training and testing. In order to become a HP contractor, they must take a week-long Building Analyst course through the Building Performance Institute (BPI) and then pass the final test. They also need to be designated as a BPI GoldStar contractor (which is an accreditation), attend a day long program overview training about Home Performance and sign a participation agreement. In addition to the BPI certification, they also have to meet the following requirements:

- Have been in business for at least one year
- Be registered with the NJ Department of Revenue
- Be registered with the state of New Jersey as a business and have a NJ Home Improvement Contractor (HIC) License
- Have at least a \$1 Million general liability insurance coverage
- Have a federal tax ID number

It could take anywhere from four to eight months before a contractor is officially participating in Home Performance.

The residential enhanced outreach team will continue coaching these contractors throughout the process by educating them about the programs, the benefits they would receive, the requirements they would have to meet, but also providing them with exact dates, locations and times of where BPI training and testing is available. They are a valuable resource to these new contractors as the majority of them have to be closely guided through the entire onboarding process.

While the team may recruit new raters to participate in RNC, the focus is on expanding the builder network. This also is a time intensive process as projects take in some cases up to two years (for multi-family projects) to be completed through the program. The builder works directly with a rater, who is responsible for providing third party testing and verification and rating each home that is brought into the program.

Out of all the programs mentioned above, HVAC takes the least amount of time in onboarding a contractor. An HVAC contractor is on boarded when they submit a *WARM/COOL*Advantage application. However, each contractor has to be taught what incentives and eligibility requirements should be met and how to properly submit an application. The Account Manager again serves as a coach in this process, especially with how to submit an online application and also guides them through the technical Manual J&S equipment sizing requirements.

Based on last year's results, we are targeting to recruit 130 contractors/builders annually, which would equate to roughly 11 trade allies on a monthly basis. The monthly target will certainly fluctuate based on seasonality concerns throughout the year.

Applications received attributed to Outreach

The goal for the number applications received attributed to Outreach is a combined target for HPwES, RNC and HVAC, and will be based on identifiable Account Manager activities related to the applicant or trade ally prior to application submittal. We will monitor the trade allies recruited to the programs to see how many applications they are contributing. Projects/completions will be tracked for the HPwES and RNC programs while applications will be monitored for the WARM/COOL Advantage programs. We will label projects/completions as “applications” submitted.

As an example, from November 2016 to June 2017, 369 HVAC applications were attributed to Residential Enhanced Outreach, which was 1.9% of the total HVAC applications that came in for FY17. Our goal is to attain even more applications in FY18, especially because we will have the entire fiscal year to recruit contractors and will also track the applications from contractors and builders, who began participating in FY17 as a result of the enhanced outreach efforts. Our annual target of applications across all three programs is 720, which equates to 60 applications on a monthly basis.

Table 1: FY18 Residential Outreach Goals and Targets

Residential Goals	Monthly Target	Annual Target
# of Trade Allies Recruited	11	130
# of Applications received attributed to Outreach	60	720

C&I and Renewable Programs Focus

The C&I outreach effort will focus on those sectors and customers that present the highest potential for program participation and significant energy savings.

FY18 Strategies

- Focus on engaging program participants;
- Program training preparation;
- Distributor/Supply House Engagement;
- Developing strategies to promote Customer Tailored Pilot (once launched);
- Continue and improve LEUP Market Segment Focus;
- Continue and improve LGEA Post Audit Account Management follow-up;
- Support Distributed Energy Resources and Renewables Programs.

Focus on engaging program participants

Building upon Outreach networks established in FY17, the Team will further encourage customers, trade allies and stakeholders to participate in the various C&I programs. We will accomplish this through a three pronged approach as follows:

- One-on-one customer meetings;
- Leveraging top performing contractors and partners to promote programs;
- Developing strategies to energize the second tier contractors and partners to increase participation.

One-on-one customer meetings

We will proactively engage large businesses, municipalities, state agencies and schools in direct one-on-one meetings. Large businesses may include pharmaceutical, transportation, retail, hospitality, restaurant chains, food preparation/processing and others with single large locations or

multiple facilities. Smaller entities will be directed toward the trade ally community for one-on-one engagement.

Leveraging top performing contractors and partners to promote programs

Contractors and other partners such as distributors, manufacturers, architects and engineers represent an “indirect channel” to customers and customer engagement. The importance of the indirect channel in advancing the goals of NJCEP cannot be stressed enough. Those contractors that are currently producing the majority of the projects should be leveraged to make sure that their efforts in promoting the program to their target customers continues. Direct outreach to this top 20% of the Trade Ally database will include a review of desired training development. We will explore the development and implementation of surveys as a tool to solicit feedback on training needs and challenges to program participation. Engagement methods may include but would not be limited to the use of webinars, one-on-one meetings, and training development. We will also explore the use of phone surveys as another tool for developing best practices for trade allies.

Developing strategies to energize the second tier contractors and partners to increase participation

The volume of applications and projects that come from the top producing trade allies (first tier) has remained relatively consistent. In order to truly engage the indirect channel and leverage the volume of program representation that they can provide, the second tier of trade ally needs to be energized. Second tier trade allies sporadically participate in and promote NJCEP, but have the potential for increased participation. The Outreach Plan will explore the use of direct outreach to those contractors that have submitted fewer than the average number provided by top performing trade allies. This outreach could include one-on-one meetings with select trade allies and phone outreach designed to gather information about trade ally business practices, marketing initiatives, and program support requirements that might be provided to help advance participation.

Program training preparation

The Outreach Team will work closely with program managers to prepare and deploy program specific trainings in collaboration with outreach. The Team will provide feedback to program managers on what training customers and trade allies are asking for. We will explore various deployment options from in-person presentations to trade organizations, webinars and on-demand training available through the Clean Energy Learning Center.

Distributor/Supply House Engagement

In FY17, the Outreach Team catalogued electric distributors across NJ and began to engage them in NJCEP promotion. Engagement was cross-promotional across C&I and Residential markets. In FY18, the Team will explore distributors with the best potential for NJCEP engagement and promotion, and continue a proactive approach by training sales staff, participating in counter days and providing distributors with collateral they can share with their customers. Based on successful models for programs in other territories, distributors often work directly with customers to develop energy efficient projects, and are an invaluable resource for daily contact with contractors and installers. Account Managers will work with distributors to review stocked products compared to program eligibility requirements. The goal is to train a resource that contractors already consider a trusted advisor, and make qualifying products readily available for easy program participation.

Developing strategies to promote Customer Tailored Pilot (once launched)

The Customer Tailored EE Pilot Program supplements the current New Jersey Commercial and Industrial incentive programs by offering a streamlined approach to developing and implementing

EE projects for mid-to-large customers. Among other things, it allows customers to bundle multiple prescriptive and custom measures into one application with one project delivery approach.

Eligible customers for this pilot will be identified by Account Manager through one-on-one contact or via contractors who participated in training about the pilot.

The launch of this pilot is expected in early FY 18 and the outreach team will be prepared to assist in promoting it.

Continue and improve LEUP Market Segment Focus

The FY18 C&I Outreach plan, includes the successful engagement with large energy users (LEUs). This market segment is relatively small in the number of qualified participants in comparison to the larger C&I market, but the opportunity to influence larger overall savings is greater. It is estimated that recent changes to the contribution threshold requirement should increase the number of eligible participants while also addressing the lower usage profiles or existing participants.

In FY18, Account Managers will engage this expanded group of users and relay not only changes to the LEUP program, but also stress that the availability of larger incentives can dramatically effect capital expense modeling. Additionally, this segment will be broadened to include large customers that may not qualify for LEUP, but have potential for program participation. The particular challenge within this market segment is that projects tend to be much larger and the business cycle is much longer. The goal is for Account Managers to provide continuous interaction with those responsible for capital expenditures, building operations management, facility maintenance, and construction which is critical to LEU participation.

Continue and improve LGEA Post Audit Account Management Follow-up

The LGEA program presents an opportunity to provide beginning-to-end customer engagement. As was done in FY17, an Account Manager will be assigned for all post audit interaction with the NJCEP. This includes participation in customer audit exit meetings and all subsequent follow-up. The municipal/local government/schools segment has particular needs related to Outreach. The decision process within these institutions are typically by committee or through a board of directors. As such they can be influenced by member term limits, calendar restrictions, and other influences that if not monitored can lead to missed opportunities for conversion to actual EE projects. The goal is for the Account Manager to engage LGEA entities through their decision-making process by maintaining project focus and offer program assistance as needed. The Outreach Team will work the Ombudsman's office coordinate messaging and participant contact to most efficiently use resources.

Support Distributed Energy Resources and Renewables Programs

The C&I Outreach Team will continue to support Distributed Energy Resources (DER) and Renewables programs in FY18 which include Combined Heat and Power (CHP), Biomass and SREC programs. Account Managers will first assist customers by discussing their EE plans augmented by asking additional questions. Simply asking, "Are you installing a generator?" or "Have you considered solar power?" can identify potential for participation in additional programs beyond the initial customer request. Participants installing generators have the potential for installing CHP measures to take full advantage of the technology. Participants installing solar power equipment have the potential for participating in the SREC program. After reviewing all the potential measures, the Account Manager can explain the programs and guide the customer to the appropriate programs.

C&I Goals – Monthly and Annual Targets

The C&I Outreach goals will focus on submitted applications and the actions completed to drive participation through a combination of individual outreach, sector focused education and program support across all C&I programs. In addition to establishing and tracking specific goals as shown below, the Outreach Team will also track the quantity of applications approved for payment, energy (kWh) savings, demand (kW) reduction, gas (MMBTU) savings and the number of booth visitors at events.

- Applications received attributed to Outreach
- Number of Trade Allies Recruited
- Outreach meetings with participants and trade allies
- Presentations to participants, trade allies and key stakeholders
- Number of attendees at presentations
- Utility/NJCEP joint customer meetings

Applications received attributed to Outreach

The goal for the number applications received attributed to Outreach is a combined target for SmartStart Buildings (SSB), Pay for Performance (P4P), Direct Install (DI) and LEUP and will be based on identifiable Account Manager activities related to the applicant or trade ally prior to application submittal. The targets were established based on application attribution to the Outreach Team in FY17. The intent of this goal is to demonstrate the level of program participation directly attributed to outreach efforts and to track the corresponding energy savings. We have not included LGEA in the applications goal as LGEA projects are reported to the BPU as entities and buildings rather than applications, and do not directly capture energy savings at completion. Separate from the applications received, we will track the quantity of LGEA entities and buildings submitted through the program.

Number of Trade Allies Recruited

The goal for the number of trade allies recruited is a combined target for all C&I programs, and will be based on identifiable Account Manager activities related to the trade ally prior to participation. The different C&I programs have different requirements for enrolling trade allies. For C&I programs, trade allies could be contractors, ESCOs, suppliers, manufacturers, architects or engineers. In FY18, we will identify recruited trade allies through one of two methods depending upon the program.

1. SSB, P4P, and LEUP: Count prospects as recruited trade allies after they submit their first application through the programs;
2. P4P and DI: Count prospects as recruited trade allies once they have completed the program overview training and signed a participation agreement.

SSB, and LEUP programs do not have any specific trade ally registration or training requirements to participate in the programs. Conversely, P4P and DI programs have specific and rigorous training requirements to become a qualified trade ally.

Outreach meetings with participants and trade allies

The goal for the number of Outreach meetings with participants and trade allies has been derived by correlating average meeting quantities in FY17 with program changes in FY18. Meetings are defined as face-to-face or phone/conference call meetings with potential or existing participants and trade allies. The intent of this goal is to demonstrate the level of outreach to specific participants.

Presentations to participants, trade allies and key stakeholders

Presentations to participants, trade allies and key stakeholders are defined as standalone presentations to organizations or groups of companies to promote the various programs. These presentations are differentiated from presentations at events which will be tracked separately. The intent of this goal is to demonstrate educational activities with the express purpose of engaging potential participants.

Number of attendees at presentations

We will measure the number of attendees at each presentation to show the volume of potential participants that we have educated about NJCEP. By planting the message of NJCEP program offerings and energy efficient benefits, potential participants will be more aware of energy efficient measures and program offerings that might assist them with their projects. While we often do not obtain individual presentation attendee names and contact information at the time of the presentation, we will track post presentation activities, meeting requests, and project/application leads in the CRM database when information is available to measure presentation effectiveness. We will explore development and use of presentation surveys to identify attendee program understanding and support needs from Outreach, and to establish post-presentation communication.

Utility/NJCEP joint customer meetings

In FY17, we established relationships with several of the utility account representatives who collaborated with us to participate in joint meetings with their customers. We will continue to leverage and cultivate these utility relationships to encourage continued joint customer meetings.

Table 2: FY18 C&I Outreach Goals and Targets

C&I Goals	Monthly Target	Annual Target
# of Applications received attributed to Outreach	30	360
# of Trade Allies Recruited	6	72
Outreach meetings with participants and trade allies	24	288
Presentations to trade allies and key stakeholders	2	24
# of attendees at presentations	30	720
Utility/NJCEP joint customer meetings	3	36

Conclusion and Look Ahead

As we have heard from program participants and implementation teams, the Outreach Team strongly believes that program-wide outreach services are already bearing fruit and will play a vital role in market education and successful participation. Driven by program evolution and participant feedback, we will continue to support successful strategies and we will work with the BPU to update and revise this Plan as market conditions change and evaluations of the programs occur. Based on program experience, evaluation is a key planning component. The Enhanced Outreach Plan aligns various strategies with those recommended in the *Process Evaluation Study prepared for The New Jersey Clean Energy Program (Process Evaluation)*² published in January 2016 as shown in the table below.

² *Process Evaluation Study prepared for The New Jersey Clean Energy Program, energy & resource solutions (ers)*, January 2016

Table 3: Excerpt from Process Evaluation Summary List of Recommendations³

#	Section	Page	Recommendation	Action Items
4A	Marketing & Outreach	66	Engage the IOUs to market NJCEP offerings to their customers.	<ul style="list-style-type: none"> ✓ Develop information that can be hosted on IOU websites (existing info varies dramatically) ✓ Collaborate with IOUs on targeted campaigns (bill inserts, utility emails) ✓ Explore how data might be shared between IOUs and NJCEP to target marketing and outreach efforts ✓ Work with utilities' key account representatives to target large customers (400 kW and up)
4B	Marketing & Outreach	68	Develop a comprehensive marketing and outreach plan to increase participation and energy savings with targeted spending levels of 3% to 5% of the total program budget.	<ul style="list-style-type: none"> ✓ Consider increasing digital advertising presence, use of email and social media (Facebook, Twitter, LinkedIn) ✓ Determine needs and functionalities for the website and implement a new platform. ✓ Develop specific metrics to track marketing success (website views, participation rates, program inquiries, energy savings, etc.) ✓ Develop and manage the Trade Ally Network ✓ Dedicate staff to actively conduct outreach to larger customers (400 kW and up) ✓ Consider a co-op advertising program for trade allies.

Interim Marketing Plan

This Interim Marketing Plan provides an overview of the marketing efforts that would be implemented if an Interim Marketing budget is approved for FY 18.

These efforts would be limited to the most critical marketing needs to continue to support the programs.

Website Redesign and Hosting

The NJCEP web site has not been updated in over ten years. A redesign of the site is critical to provide enhanced navigation for customers and partners as well as to ensure proper website security. The improved design will not only try to better reflect how customers and partners use the site, but also provide enhanced measurement and marketing systems integration to enhance the customer's journey. By removing the impediments from website navigation and making it easier for customers to find the most frequently used documents, submit applications, and identify relevant content, the redesign will help streamline self-serve capabilities and accelerate discovery-to-action timelines

This Plan will also support the hosting of the existing website as well as the new site once it is completed.

Marketing for Underperforming and New Programs

There has been no marketing in support of the NJCEP programs for over 18 months and several programs have seen a significant decline in participation since marketing ceased.

³ The bullets highlighted in green in the table are outreach focused recommendations that correspond with Plan. The bullets highlighted in red are marketing focused and are not part of the Plan.

This plan would allow for some marketing tactics for those underperforming programs, as well as any new pilots or programs that may launch during the year, to help increase program participation while also helping raise overall brand awareness within specific sectors.

Under this plan, low cost marketing strategies will be utilized and tracked. Examples of these strategies may include:

- Development of digital advertising strategies
- Updating or developing program literature for use by staff as well as program partners and trade allies.
- E-mail marketing campaign of specific program information to key lists of partners, contractors or members of trade/business organizations.
- Social media advertising to promote specific programs.
- Direct mail

Evaluations of program participation will inform which programs will most benefit from marketing and which strategies will be used.

Appendix A – Key Performance Indicators

The following table identifies the KPI (goals) and targets for both the Residential and C&I sectors.

Table 4: Residential and C&I KPI

Residential Goals	Monthly Target	Annual Target
# of Trade Allies Recruited	11	130
# of Applications received attributed to Outreach	60	720
C&I Goals	Monthly Target	Annual Target
# of Applications received attributed to Outreach	30	360
# of Trade Allies Recruited	6	72
Outreach meetings with participants and trade allies	24	288
Presentations to trade allies and key stakeholders	2	24
# of attendees at presentations	30	720
Utility/NJCEP joint customer meetings	3	36