

# Using Effective Communication to Showcase Program Success

Webcast Transcript

December 18, 2013

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## Webcast Agenda and Meeting Logistics

### Slide 1 and 2: Introduction Slides

Operator: Good afternoon my name is Charlone, and I will be your conference operator today. At this time I would like to welcome everyone to the U.S. EPA Webcast, “Using Effective Communication to Showcase Program Success.” All lines have been placed on mute to prevent any background noise. If you should need assistance during the call, please press star then zero and an operator will come back online to assist you.

Thank you. Ms. Emma Zinsmeister, you may begin your conference.

Emma Zinsmeister: Thank you, and welcome everyone to our Webcast today, I am with the U.S. EPA State and Local Climate and Energy Program and this is our third installment of our Webcast series on communication and outreach strategies for state and local governments running climate and clean energy programs. Today we are going to be focusing on effective strategies for showcasing program results.

### Slide 3: How to Participate Today

Emma Zinsmeister: Before we get started here is some information on how to participate into today’s call. You’ll need to access the GoToWebinar control panel on your screen; this can be opened and collapsed by clicking on the arrow in the orange box. Audio is only available through the conference line, and as the operator mentioned, you are all placed on mute.

However, we do want to get your questions that you may have for any of the speakers on their presentations. So please enter any questions throughout the Webcast that may come up and you can do this by typing into your GoToWebinar panel. There is a section for questions. Just type those in, please indicate which speaker you are directing those questions to and then hit send, and we will compile those for the end of the Webcast.

And if at any point today you experience technical difficulties, Lauren Pederson from ICF International is the on the line to provide technical assistance. And you can reach her via e-mail at [lauren.pederson@icfi.com](mailto:lauren.pederson@icfi.com).

### Slide 4: Webcast Agenda

Emma Zinsmeister: We have a full Webcast agenda today. I’ll start off by providing a little bit of background on our program here at EPA and the series that we’re hosting. We’ll then hear from Karina Castillo with the CLEO Institute about its program to help provide opportunities and

training for folks to get engaged in climate and to share those and celebrate the results of their programs.

We'll then hear from Eileen Quigley and Elizabeth Willmott with Climate Solutions on some innovative strategies for visualizing data in a really compelling way to help programs with their communications. And then we'll hear a couple of case studies, first Keith Canfield from the Clinton Foundation will be talking about a program that they're doing with home energy retrofits. Then we'll hear from Kelly Lucci of the Vermont Energy Investment Corporation on the interesting programs Vermont is running in a variety of sectors to get energy efficiency programs off the ground.

#### Slide 5: U.S. EPA's State and Local Climate and Energy Program

Emma Zinsmeister: Before we launch into any presentations just some background on EPA's State and Local Climate Energy Program. Our program is designed to help state and local governments reduce their greenhouse gas emissions. And we do this by focusing on the multiple benefits that can be achieved through strategies to reduce emissions.

We help to promote collaboration across many levels of government. All of our resources are available free and to the public on our Web site, which is listed at the bottom on the screen. These include best practice policy, examples and case studies, analytical tools, a lot of quantification tools and information on opportunities to participate in training peer exchange calls, like today's Webcast. So I do encourage folks to check out that information when they have a chance after the Webcast.

#### Slide 6: Communications Methods for State and Local Climate and Clean Energy Programs

Emma Zinsmeister: As I mentioned, today is the last of a three-part series that we've been doing on communications. And as you can see here on the slide our previous two Webcasts focused on how to attract participation in your program through communication strategies and then how to promote behavior change.

All of the recordings and copies of the presentations will be made available at the Web address at the bottom of the screen in the coming weeks. So please do check those out and share those with your colleagues that you think may be interested.

#### Slide 7: Communications Framework

Emma Zinsmeister: In conjunction with this Webcast series, EPA has been developing a new portion of the State and Local Program's Web site that will provide how-to information, in-depth

on communication strategies, as well as other parts of the design and implementation process of energy programs.

For the framework that we've developed for designing and implementing communication strategies, the diagram that you see on the slide here is just an outline. Once we have this material finalized on our Web site it will be accompanied by much more in-depth step-by-step text that will help guide programs through the process – defining objectives of the program, identifying the right audiences to reach out to, how to consider those audiences' challenges, the right times to engage them, and the subsequent steps on the screen here. You'll have multiple opportunities through today's Webcast to provide your feedback on this framework. We welcome your comments since it helps us refine the material that we will be developing.

#### Slide 8: Contact Information

Emma Zinsmeister: This is my contact information, if you have any questions about these Webcasts or our program at EPA, I welcome you to contact me and let me know. I'm always also interested in hearing about the programs that you are running in your governments. So please feel free to reach out to me with suggestions or ideas.

## Poll Question #1

Emma Zinsmeister: Before we start getting into our feature presentations here today, we're going to pull up a poll question here to get some of your initial feedback and reactions to our communications framework. So Lauren is going to go ahead and pull up a poll question; if you could just take a second to take into consideration the steps that we've outlined here and how that resonates with your experience, that would be great. So Lauren if you want to pull up and read off the poll question that would be great.

Lauren Pederson: Sure for the first poll question, please evaluate our draft communications framework based on your experience. You can choose multiple answers, so select all that apply. Do you think all steps are captured? One or more key steps are missing? One or more steps are unfamiliar to me? One or more steps should be renamed and/or the order of steps needs to be adjusted?

Emma Zinsmeister: As you think about how this framework relates to your experience, feel free to type into the GoToWebinar panel any specific suggestions you have for what you think might need to be changed, revised, or added. As I mentioned there will be other opportunities as well during the Webcast to comment on this, so as you hear the speaker's presentations today that may also generate some ideas. But we do definitely appreciate all the feedback we can get from you. All right Lauren if you want to go ahead and pull up the results.

Lauren Pederson: So for the results, 53 percent thought that all the key steps were captured, followed by 26 percent said one or more key steps are unfamiliar to me, and 14 percent said one or more key steps are missing. Then nine percent said the order of steps needs to be adjusted, and eight percent indicated one or more steps should be renamed.

Emma Zinsmeister: Great, thanks for the feedback. It's helpful for us to hear that what we're developing resonates with your experience and the presentations that you'll hear today as well as in our previous two Webcasts that you'll be able to access the recordings of. I hope we'll provide ideas and information for some of these steps here that might be unfamiliar to folks on the line. So thank you for that.

# Tools to Encourage Continued Engagement

## Slide 1: Title Slide

Emma Zinsmeister: Now we are going to move into our first presentation by Karina Castillo from the CLEO Institute. Karina is the CLEO Institute Program Manager; she has a Bachelor of Science degree in meteorology and applied mathematics from the University of Miami, and a Masters in professional science in weather climate and society from the Residential School of Marine Atmosphere Sciences University of Miami. She was born in New Orleans but considers herself a native of Miami, since that where she has spent most of her time.

She has worked for the National Oceanic and Atmospheric Administration and for the Miami Date County Office of Emergency Management. While with the county Karina created and developed a natural hazard database to analyze the frequency and intensity of natural hazard occurrences in Miami from 1950 to 2010 and she joined the CLEO Institute in August of 2010. So with that Karina I will turn it over to you.

## Slide 2: The CLEO Institute

Karina Castillo: Good afternoon my name is Karina Castillo and I am the Programs Manager for the CLEO Institute. We are a small non-profit located in Pinecrest, Florida, which is a suburb of Miami. We focus on amplifying civic engagement on environmental issues.

## Slide 3: The CLEO Project on Climate

### Slide 4: A Working Model

Karina Castillo: At the CLEO Institute we decided that climate change was the defining environmental issue of our time so we designed and created the CLEO Project on Climate with the main objective of bridging the divide between science and society. We consider the CLEO Project on Climate a working model for education on engagement to build an engaged citizenry who can support climate resilience in our communities and who include stakeholders in their projects.

## Slide 5: Two Phases

Karina Castillo: So really our design is very simple, we have two phases – in the first phase we ask people to find and share their voice by answering within the project questions such as, what is climate change all about? And what is my role? In the second phase we really try to broaden the conversation and get people trained through/via climate leadership training. We ask them to

come and spend one to two hours a day or a full two days and listen to the science, talk about some of the solutions that are out there to adapt to and mitigate the effects of climate change, and also how to talk about the issue.

Slide #6: Merge the everyone's efforts

Karina Castillo: So we try to merge the efforts of everyone. Take a minute and look at this list and you should fit into one of those categories. If you do feel that you don't fit in one of those categories, we will work to include you. Because we really think that by including all stakeholders and merging everyone's efforts together is really how we're going to move forward on the issue.

Slide #7: Promote, Provoke, Celebrate

Karina Castillo: When we were designing the CLEO Project on Climate (CPOC), with our director's experience she realized that there is one key ingredient common to program success; we need to "promote, provoke, and celebrate" engagement by everyone and all our audiences. So in the following slides I will go through a little bit about how we do each of those and hopefully you can see how you can draw some parallel in your program that you're either designing or already have launched in your communities.

Slide #8: Promote: Give Multiple Access Points

Karina Castillo: When we promote we like to say that we give multiple access points. To do so we offer multiple engagement opportunities. As I mentioned before you can enter the project question, you can come to climate leadership training. Or, if you have, if you're not inclined or interested to do one of those, we give you opportunities to attend our science cafés. Or participate in a high school forum if you're still in school, or you come to a movie night. We also have a communication concept: currently our Youth Task Force is launching a Twitter campaign, where we're asking for the best tweet on the science of climate change and also the best tweet on what your role is.

Slide #9: Engagement & Showcasing = Accountability

Karina Castillo: Really we like to say that in engaging and in showcasing all of our participants this translates directly into accountability of our work and of the program in the community. If you think about that, we're creating ambassadors of not only for the broader issue of climate change but also ambassadors of our work and they are helping us tell our story.

Slide #10: Science Cafes

Slide #11: Photo of meeting/social gathering

Karina Castillo: I'm going to go through really quickly some of the opportunities that we have. This is a science café where we brought four climate experts together and created a climate expert panel and asked everyone what the burning questions were or what taboos did they want to address about the issue.

Slide #12: Think Tanks

Slide #13: Climate Leadership Trainings

Karina Castillo: We also have a CLEO Society where we bring together professional people and ask them to gather together and have it in a fun, social way and talk about climate change. We also bring together volunteers and community partners to talk about the solutions and how we can move the issue forward and where are some of the major problems that need addressing.

Slide #14: Promote: Give Everyone A Place at the Table

Karina Castillo: We also host our climate leadership training and as you can see we try to bring everyone to the same table. So in keeping with our PPC (promote, provoke, and celebrate) we also like to promote and give everyone a place at the table. In this panel discussion you can see that we bring together teachers and elected officials and also young school children. We also give them a chance to answer what climate change is all about and what's my role.

Slide #15: Encourage Collaboration

Karina Castillo: We also highly encourage collaboration and really bring people together and let them brain storm. In this picture they were coming up with a poem about climate change. In also keeping with PPC we're provoking using social media, we have a Facebook page, and we have our Twitter feed.

Slide #16: Provoke: Social Media

Karina Castillo: We also engage with people across all the social media platforms and then we also use this to provoke people to ask our question, which we highlight one specific individual every Thursday on our Web site and quote them and invite others to answer the question.

Slide #17: Provoke: Encourage (healthy) Competition

Karina Castillo: We also promote healthy competitions; we put out everyone that has participated in our project and answered the questions, "what is climate change all about?" and

“what’s my role?” We highlight these on our Web site and list their names and their institutions and ask them to join teams and then in turn we have banks participating; banks are competing against each other. It’s really provokes people to want to participate and want to engage and to stay engaged.

Slide #18: Provoke: Let everyone know they have a role

Karina Castillo: We also let everyone know that they have a role; we have the university professors and known affiliates and also senior students who really take the time to answer and realize they do have a role to play, in that entering their carbon footprint has direct effect on the future.

Slide #19: Celebrate: CLEO Celebrates Participants

Karina Castillo: With everything we do we celebrate participating, for everything that everyone participates in they get a certificate or thank you e-mail. You really can’t underestimate the power of just saying “thank you, you did a great job,” “thank you for being a part of us.” We also have a leadership circle where we invite people annually and those are people who have helped us advance the course.

Slide #20: Certificates

Slide #21: Celebrate & Applaud Their Efforts

Slide #22: CLEO Partners

Karina Castillo: There is one of our certificates and again our participants’ showcase. If they make a video answering the project question we put them on YouTube and we highlight them and celebrate them weekly as well.

Slide #23: CLEO Leadership Circle Induction

Karina Castillo: We also celebrate our diverse community partners in our leadership circle induction that we hold yearly.

Slide #24: Social Learning

Karina Castillo: With our program we’ve found that what we do is social learning. We often find that it’s very hard to measure but there are things that you can do. When you’re implementing a program or moving forward with your program and you may think that you don’t have a measure, there is always something you can do.

Karina Castillo: For example we use surveys where we gauge what their participation issues were, how they feel about it. We do a pre- and post- answer-the-question analysis, where we look at how their answers have changed from the beginning of training to the end of training. We also collect feedback quotes.

#### Slide #25: Sharing Program Components & Successes

Karina Castillo: What we also feel is very important is that you need to share your program information and the success and in sharing is really where you're creating the accountability of your program. Also getting your program out there and letting others be the ambassador in sharing their voice.

#### Slide #26: Take-Aways

Karina Castillo: So a couple of take-aways are that to build engagement in education you have to use PPC: promote, provoke, and celebrate. And you need to include all stakeholders. You also need to realize that open-ended learning is hard to measure but once you do it's very meaningful. Always our long-term goal is attracting and retaining diverse audience engagement.

Karina Castillo: Thank you very much and if any of you would like more information you can visit our Web site or my e-mail and contact information is right there on the last slide. Thank you.

Emma Zinsmeister: Thanks Karina that was a great presentation and I think really hit on key ideas about how folks can think about their communication strategies. For folks who may have participated in our call last week, where we talked a lot about community based social marketing strategies, I think the PPC system that Karina has described really meshes well with that in the sense of getting people to make commitments and celebrating those and recognizing folks that do participate in your program. Some really great ideas there, and also the idea of creating accountability not only for the folks participating but on the program itself--going back and sharing with your audience what the program is accomplishing. I think you shared some really great points, so thank you for that.

## **Poll Question #2**

Emma Zinsmeister: Before we move onto our next presentation, we're going to pull up our next poll question, to see at what stage your agency or organization is in educating and engaging your audiences. So have you done any of the promoting or celebrating that Karina described? Please just take a second to put your responses in; thank you.

I think we can go ahead and pull up the poll results. Great, so it looks like at least just about half of our folks that are on the line have engaged in promotion and about a quarter have done all three. So it looks like this strategy is really resonating with people. Thank you so much for providing that information.

# Telling Your Climate Story with Carbon Math

## Slide #1: Title Slide

Emma Zinsmeister: Next we're going to be hearing from Eileen Quigley and Elizabeth Willmott with Climate Solutions. Eileen is the director of strategic solutions at Climate Solutions and she oversees the new energy cities project "Sustainable Advanced Fuels" and "North West Bio-Carbon Initiatives." She speaks regularly and blogs about the Northwest and how it is demonstrating the pathways to a low-carbon future. She is a seasoned executive leader of four profit and non-profit businesses. She is a former magazine and newspaper business and politics reporter and she has been a civic leader in the Puget Sound area since moving from the east coast in 1988. She holds a Master's of Science in journalism from Columbia and a Bachelors in literature from Yale.

Elizabeth Willmott is the New Energy Cities Program Manager, working with cities in Washington and Oregon to help them meet their carbon reduction goals through innovative programs and policies, with experience with the World Bank, U.S. Department of Housing and Urban Development in King County, Washington.

Elizabeth brings a deep and wide background in community planning to the New Energy Cities team. Elizabeth holds a double degree in biology and Chinese language from Williams College and a Master's degree in public policy from Harvard Kennedy School.

## Slide #2: Presentation Agenda

Eileen Quigley: Thank you very much, for this opportunity; we are really grateful for all of the effort that has gone into putting together this Webcast. We will learn as much as we hopefully will teach, so we thank you for this opportunity. This is Eileen and I'm going to speak very briefly about the New Energy Cities Program.

We're just going to talk very briefly about carbon efficiency and the New Energy Cities program and then Elizabeth is going to walk you through a case study on Beaverton, Oregon and then we will be done.

## Slide #3: Climate Solutions Mission

Eileen Quigley: So Climate Solutions is a Northwest clean energy non-profit organization. We've been around for 15 years and we are working on accelerating practical and profitable

solutions to global warming, focused in the Northwest as a national world leader as clean energy economy.

#### Slide #4: New Energy Cities Program

Eileen Quigley: The New Energy Cities Program started in 2009; we work with small to medium size cities and we focus on cities because cities globally are responsible for approximately 70 percent of all greenhouse gas emissions. So we believe that a focus on cities is highly leveraged and we focus on cities that are under the population of 250,000 because we feel that they don't have as many resources as the larger cities.

We are very blessed because we happen to have in our region Seattle and Portland, which are national leaders in addressing climate change. So we're able to learn from them as well as many other cities throughout the country. But we focus our practice on the communities that surround Seattle and Portland.

The tenets of the program are to help communities build highly efficient buildings with a wide range of renewable energy built into their utility portfolio, eco-mobility (which is a wide range of strategies around transportation), and then smart technology that ties it all together.

#### Slide #5: Logos of cities

Eileen Quigley: I just put up some logos up, which are the communities that we've been in, so you can see we're in both counties as well as cities, Clark County for example, Thurston County in Washington, and then most recently we've been doing a lot of work in Issaquah out here which is sort of the gateway to the Cascades and also in Beaverton, which is outside of Portland.

#### Slide #6: City-Led Clean Energy Innovation

Eileen Quigley: We published a study on city-lead clean energy innovation two summers ago, where we looked at communities throughout the nation that were really leading in climate solutions and demonstrating the economic value of those benefits. If people are interested in that study, we can make sure that the link is available to others later.

#### Slide #7: New Energy Cities Approach

Eileen Quigley: Our approach is that we work with communities, we require the communities we work with to set aggressive but attainable greenhouse gas targets over a 20- or 30-year period. We then do the GHG math which is what Elizabeth will walk you through. And ultimately we create what we call sustainable energy strategies to complement their local comprehensive plans.

So one key goal of our program is to imbed an understanding of energy in local plans and the impact of energy in climate and how important it is for regions to learn how to manage their energy needs sustainably. We then work with communities to help them figure out what the specific tactics are for the built environment, transportation, waste management, and waste water and then of course carbon storage because we also need to remove as much carbon as we possibly can from the atmosphere. A key tenet of our program is that we are aligning our efforts with state, regional, and utility policies and programs. Thank you this is now Elizabeth.

Slide #8: Beaverton, OR

Elizabeth Willmott: This is Elizabeth Willmott and I appreciate the opportunity as well. We were approached by Beaverton, Oregon earlier this year to look at its comprehensive plan which included setting a very specific goal around greenhouse gas reduction.

Slide #9: 2012 Beaverton Energy Flow

Elizabeth Willmott: Beaverton already has an excellent green reputation regionally and nationally. I wanted to research what it would take to achieve a greenhouse gas reduction of 80 percent by 2050. So we essentially took a snap shot of their current energy systems in 2012 and we looked specifically at energy sources and uses, as well as greenhouse gas emissions.

Slide #10: Beaverton GHG Emissions 2012-2030

Elizabeth Willmott: We collected data from the utility and from the transportation agency and we essentially presented that data in what is essentially an adaptation of a larger scale map that Lawrence Livermore has published in the past for the United States. Mayors tend to love this map because it depicts the city's energy system in a single graphic that folks can get their arms around.

Slide #11: 40 Percent Reduction by 2030: What Will It Take?

Elizabeth Willmott: This next graphic we created to show the scale of necessary reduction for Beaverton relative to its potential growth and we essentially said, OK, what would it take to achieve that 40 percent reduction by 2013 which is a halfway mark to their 80 percent by 2050 goal.

Slide # 12: Beaverton GHG Emissions 2012-2030: Estimate Reduction Due to CAFÉ Standards

Elizabeth Willmott: We said there are several existing state and federal laws that are already in place that will have a greenhouse gas emissions reduction, the corporate average fuel economy

standard, Oregon renewable portfolio standard and Oregon's clean fuel standard which is currently expected to sunset in 2015, but is under consideration for extension.

Slide # 13: Beaverton GHG Emissions 2012-2030: Estimate Reduction Due to CAFÉ Standard and Oregon RPS

Elizabeth Willmott: So we looked at the reduction that would come from full implementation of the corporate average fuel economy standard, we looked at what the Oregon renewable portfolio standard would do and we looked at the impact of the Oregon clean fuel standard. What we concluded from this as you can see here, from the blue line associated with Oregon clean fuel standard, that only gets the community down to approximately stabilizing their emissions to the 2012 level.

Slide # 14: Beaverton GHG Emissions 2012-2030: Estimate Reduction Due to CAFÉ Standard, Oregon, RPS, and Oregon CFS

Elizabeth Willmott: So that remaining wedge is what's necessary for the community to mobilize on its own.

Slide #15: What Would it Take (Part 2)

Elizabeth Willmott: Then we said what would it take for them to achieve that, to close that gap and what we did was estimate the greenhouse gas emission reductions associated with targets in three areas. We lined this up specifically with Governor Kitzhaber's ten year plan and national best practices, so that it could be scalable to the state level and also that Beaverton was staying current with national best practices.

Specifically we looked in the areas that will be familiar to most climate planners across the country, transportation energy efficiency and renewable energy. I want to point out a report that was really helpful to us that we were not involved in producing but has been extremely ground breaking I think in distilling the best practices of climate plans from around the country.

And that's called "Energy Benchmarking In Seattle: The Road to 2050". That was published in March 2013 and I think has been among the most articulate distillations of the different climate plan lessons from around the country.

Slide #16: Beaverton GHG Emissions: Estimate Reduction Due to Metro Climate Smart Communities Target

Elizabeth Willmott: And so we said OK, based upon achieving specific transportation targets associated with metro government in the Portland area, this yellow line represents the reduction that they would achieve.

Slide #17: Beaverton GHG Emissions: Estimate Reduction Due to Metro Climate Smart Communities Target and 25% Building Energies Reduction

Elizabeth Willmott: We then said what if Beaverton were to achieve a 25 percent building energies reduction community wide, essentially an energy efficiency goal, that's what that grey line represents.

Slide #18: Beaverton GHG Emissions: Estimate Reduction Due to Metro Climate Smart Communities Target, 25% Building Energies Reduction, 40% non-hydro renewable Use

Elizabeth Willmott: Then last but not least if Beaverton were to achieve 40 percent renewable energy for electricity and heating, community wide, that combination of things (the transportation, energy efficiency and renewable energy targets) would essentially help Beaverton to achieve a 40 percent reduction by 2030.

That's not to say that these targets are at all easy to accomplish but they do at least outline a roadmap for the community based upon what's in place already as well as what they can stretch to mobilize to achieve. What we found is that the feasibility study, (not a technical feasibility study) does show communities the roadmap of what's possible.

Slide #19: Carbon Wedge

Elizabeth Willmott: We've used these graphics specifically in community workshops involving local government, utilities, chambers of commerce, and community groups and we found the carbon that's in the energy wedge analysis to be really galvanizing for action. And specifically because they are user friendly, they cross divides of the utility folks who typically I think have a very deep technical expertise that local government may not have.

Slide #20: Contact Information

Elizabeth Willmott: Or the chamber of commerce comprised of business leaders who are really data driven and want to see the bottom line and want to see the numbers on how these otherwise sometimes abstract goals will be achieved. I look forward to our dialogue later on in the discussion and happy to share any resources that you may find useful.

Emma Zinsmeister: Great thank you Eileen and Elizabeth. So Eileen and Elizabeth's presentation definitely highlighted some really effective visuals that can be used to help communicate with a variety of audiences about what actions can be taken. Not only in a planning process but also providing projections and estimates of what can be accomplished that can then be used in the evaluation process and looking back at what programs have achieved. A very interesting and innovative opportunity for visualizing your data.

## **Poll Question #3**

Emma Zinsmeister: With that we're going to pose another poll question, folks on the line; how are you sharing your climate and energy solution stories? By that we mean the ways you're approaching making reductions possible in your communities. There are some options here include videos, and writing contests, blogs and chat rooms, storytelling sessions. You know are you doing other options like that. So please go ahead to take a minute to provide us with some information with how you are communicating the opportunities in your community.

Great, we can go ahead and pull up the results of the poll. It looks like a little over half of the folks aren't really looking at storytelling and story sharing yet, so hopefully the presentations today will provide some good ideas on how that can be done and effective methods for communicating stories. Then about 20 percent or so are using live story telling sessions which I think we've heard from multiple channels those messages in a live setting can be very effective.

Thanks folks for providing that information. If anyone has any questions for Eileen or Elizabeth, please go ahead and type those in to GoToWebinar and indicate who the question is for and we will compile those for the Q&A session at the end of the Webcast.

## CCI HEAL: An Employer Sponsored Energy Benefit Program

Slide #1: Title Slide

Emma Zinsmeister: So next we will be hearing from Keith Canfield of the Clinton Climate Initiative. With 20 years in the corporate world most recently as the global marketing director for a British bio-tech firm, Keith Canfield is entering the seventh year of what was originally meant to be a six-month leave of absence to work in the non-profit sector. Keith joined the Clinton Foundation Climate Initiative after they worked together on a post-Katrina energy efficient rebuilding project that he designed in New Orleans. The project was a large scale rebuilding effort which renovated 44 homes in New Orleans damaged by the storm in 100 days, cutting energy usage for their low-income residents an average of 48 percent from pre-Katrina levels, which is very impressive. The project received a Home Depot Foundation *Affordable Housing Built Responsibly Award* in 2009.

Keith received a BBA from the University of Mississippi, a MBA from Vanderbilt University and also holds the designations of New Product Development Professional and LEED-AP. He has been with the Clinton Foundation's Home Energy Affordability Loan (HEAL) program in Little Rock, Arkansas since its inception in 2009 and currently serves as its Deputy Program Director.

With that I'm going to turn it over to Keith.

Keith Canfield: Great thank you, Emma, and thanks to the EPA in particular for putting together this three part series. I think it's been great and we appreciate the opportunity to participate today.

Slide #2: HEAL: Home Energy Affordable Loan Program

Keith Canfield: I'm here to talk about the Home Energy Affordable Loan Program or as we affectionately call it HEAL, and specifically our experience in implementing it in the city of Little Rock, Arkansas as well as our largest health care university in the US, the University of Arkansas Medical Sciences.

A couple of brief comments about HEAL and why that approach. We see the employer as great creator of demand for residential retrofits, and it's a great way to really bring all the key parts of getting the residential retrofit done together under one roof. The financing, the demand, the information and the workplace has been used before to do this kind of thing.

### Slide #3: Original Social Network

Keith Canfield: If you think about 401Ks and employer-provided healthcare, both of those are ideas that really caught fire and got more than 50 percent market share in the workplace in a relatively short period of time. Very briefly I just want to show for those of you that aren't familiar with HEAL, how it works.

### Slide #4: HEAL Model Design

Keith Canfield: There is really just three components: there is a commercial saving side where we all go work with the employer, audit their facilities, find energy saving opportunities in their facilities, and then have them take some of those savings and create an employee loan fund so that their employees can also do similar energy saving opportunities in their homes, and pay that loan back through payroll reductions.

What we did with the city of Little Rock (we were a successful Climate Showcase Community grantee with the city of Little Rock), was to do a variation on this model. And that variation was for entities like municipalities and state-owned institutions that may have restrictions from employee lending and we replaced that employee lending function with the (inaudible) lender, which for the most part has been a credit union.

Again that was what we piloted at the city of Little Rock and the University of Arkansas Medical Sciences. So if you think about it, the workplace I would argue is the original social network. There was a great presentation last week from Liz [Schlegal] about community based social marketing and the workplace operates just like a community; it is a community.

The good news is that word travels fast when things are going well and bad news travels probably even faster if things aren't going so well. So it's a really important place to plan and manage communication strategies. So what we learned from this project and the communication aspects...and I'll be quite frank and honest and say we didn't have this figured out on the front end when we probably stepped into the city of Little Rock to start our employee presentations (but we think we've got a pretty good feel for it now)... is to write your ending first. I'm not talking about some kind of hokey new age idea of visualizing your success. I'm really talking more along the lines of: what will you be judged by? What data are you going to need to make a case of success, who is going to need to see it? What type of proof will they require, that kind of thing?

### Slide #5: Funnel Marketing

Keith Canfield: Everybody is seeing some variation of the traditional marketing funnel and really what I'm suggesting is that you actually start with the end in mind and work backwards. In fact I think the funnel itself is a little bit of a misnomer, and everybody that works in energy efficiency I think will agree, it's not easy and having a funnel would indicate that gravity will just kind of pull you through.

Slide #6: Not as Easy as a Funnel

Keith Canfield: I tend to think of it more as staircase and each of those levels of building awareness and getting interest and all up to the purchase of a retrofit. It takes effort to get to the top of that staircase, so you've got to think about each step, what information or what testimonials or what communication is going to keep them on the path and help them make that next step. It's worth the effort to do that.

Slide #7: Not as Easy as a Funnel, II

Keith Canfield: By the way it starts with not making a really scary process or a process that looks scary from the beginning. So the way we think about it is that really you have a case to make to the funders and decision makers that are going to decide whether or not to do your program. So it could be city managers, it could be corporate executives. So you've got to have the data and analysis and the answers to their questions to be able to do that.

But that's not the only trip of that staircase of marketing you're going to do. You need to have pilot participants that are going to be the first to try this process out. We try to very deliberately pick those that will also be good spokespeople. Then of course you're going to do the whole process again, when you open up the program to general participation, which in the case of our program is to all the employees in a particular company or organization.

Slide #8: Four Key Considerations

Keith Canfield: So when we think about those four points again it comes down to what data do you need and where do you get it. Who needs to be convinced? How do you communicate back your success and when do you do that? Then, what is the role of media and how that can help tell that story.

Slide #9: Design Your Data Capture

Keith Canfield: The first step of that process is really data capture and this is one that we did not have in place when we first started with the city of Little Rock for example. But now we have a very deliberate way of capturing the improvement that's made and employee attitudes. We do

that with a baseline survey of the general employee population before we ever set foot in the organization to begin marketing the program.

#### Slide #10: Survey

Keith Canfield: Then we'll also do a survey for the participants, so when people opt into our program, they get a little survey that kind of compares them and then they'll also get a survey at the completion of their retrofit on how their experience was and how their views have changed. Then after the program is over or at a concluding point we'll also do a general population survey.

So the point is to get a baseline and also the improvement in a way that is measureable and you can then use that when you make your case to continue the program or to roll it out somewhere else. In the case of our program we were able to go back in this case to the University of Arkansas Medical Sciences and talk about how their employees viewed the program and whether it contributes to a better workplace.

#### Slide #11: Use Organization-Specific Stories

Keith Canfield: The second thing that we feel very strongly about is and Emma touched on it and I think Cara Pike did a great job last week talking about it [in the second Webcast in the series] is, connecting with your audience through organization-specific stories. So we really looked for spokespeople within the organization that represent the different parts of the organization that can speak very clearly to the benefits, in the case of again the UAMS we had someone from admin, we had someone from the medical side.

Then we also had one of the vice chancellors who talked about the program so that we can show that to other hospitals and municipalities that are interested, so they can hear what a decision maker thinks about the program. We did it in multiple media, again not everybody is a video junkie, so we have case studies that are printed, we have e-mail blasts, but it's important to really have a wide variety of these, that really speak to the different constituencies and targets that you're going to be working with, within this organization and the next one that you'll be offering the program to.

#### Slide #12: Retell the Story with Specific Results

Keith Canfield: We also think it's really important to retell the story once you do have results. And again if you think about that on the front end, this is something, this is one of the slides that we talk about with employers on why they should offer this program. You know the question always comes up, well if energy efficiency is such a great opportunity for home owners and the environment – why aren't they doing it themselves?

### Slide #13: Arkansas Results

We reference this 2010 building performance institute study, and had these five reasons why people tend not to self-include on energy efficiency. Then we go back at a point in the project, we actually retell the story with actual results. So here are those five reasons and here are some of the things that your employees are saying about the program and about what you've enabled them to do and the return on investment that they've gotten and the money that they've saved.

So you're using real data to go back and convince the decision makers that this is a great program, it's worth continuing, or data that you can use with similarly situated employers to give them reasons to offer the program.

### Slide #14: Plan to Use Targeted Earned Media

Keith Canfield: Then the fourth thing again to consider carefully on the front end and then again on the backend of a project is when to use targeted earned media. You know it really is important to think of your media and your story as being a perishable item. I mean we all like to see our programs in print; it gives us a little validation on what sometimes is a very long lonely slog to get people to convert to energy efficiency projects.

But keep in mind a story is only exclusive once, and it's only fresh a few times, then it's no longer newsworthy in some of the media circles. So make sure that you're using that precious media capital only when it's most beneficial to you to continue to advance the goals of your projects. Think of that as precious capital, not all of publicity is good publicity.

### Slide #15: Communications Framework

Keith Canfield: Lastly I'll just return to these four items again and put up the communications framework that the EPA is proposing, which is I think brilliant. I want to link that back to how our four little tenets on what to design on the frontend for, design for your outcomes to connect to the different parts of that process. Again we think it's a great one and it's a process we will actually use and probably a more direct linkage going forward.

### Slide #16: HEAL Replication

We are in the process of rolling this project out to other parts of the country, so all these tools and testimonials and case studies and most importantly data are absolutely essential if you're going to take your program and move it to other parts of the country. They're going to want to

see the experience the different municipalities had with their employers and it's important to have good and strong data.

#### Slide #17: Keep Calm and Replicate

Keith Canfield: Then I stole this from my friends at the EPA, but it is so true as you're rolling the program out or continuing to implement your program even though it sometimes seems to be a bit of an uphill battle, keep calm and replicate, it will indeed work.

With that I'll turn it back over to Emma.

#### Slide #18: Concluding Slide

Emma Zinsmeister: Thanks Keith. I'd just like to reiterate what Keith mentioned about the crosswalk between the framework that EPA is developing and the four key points that he outlined in his presentation, because I think the different examples that you're hearing today are very relatable back to the framework and that certainly the kind of data that we've based this step-by-step approach on.

I think Keith's crosswalk highlights how it is a process with a lot of two way communication between your program that you're developing and the audiences that you are working with and it is a learning process. So that's a really important point, thank you for pointing that out.

## Poll Question #4

Emma Zinsmeister: So we'll go to our next poll question. We'd like to hear from folks on the line, what your experience is with mentoring other organizations or encouraging program replication. As Keith demonstrated, the HEAL program is working to replicate across the country. We're interested to hear what experience folks on the line have had with similar types of work to promote replication of your project in other communities. So if you could just take a minute to fill out the poll, we would really appreciate that.

Also I'll mention that you can hear more about the work the HEAL program is doing on EPA Climate Showcase Community Website. That can be found at [EPA.gov/climateshowcase](https://www.epa.gov/climateshowcase) where we have a profile on each of our grantees and a lot of great information about the HEAL program.

I think we can go ahead and pull up our poll results. Great, so it looks like just over half the folks on the line have started to help share their successes with other agencies, and fewer folks have worked on successfully mentoring and replicating. And about 40 percent look like they have had key elements of their programs replicated by others.

I think that's something that we at EPA are seeing. With the Climate Showcase Community program we're really working on promoting replication of those models and we have seen a lot of people who develop key strategies that then get replicated and not necessarily the whole program. So we appreciate your insights and hopefully a lot of the conversation we're having today will help provide insights on how you can work on that type of replication.

# Efficiency Vermont: Demonstrating Success and Sustaining Impact

Slide 1: Title Slide

Emma Zinsmeister: We are now going to go to last cast study and we'll hear from Kelly Lucci of the Vermont Energy Investment Corporation. Kelly has worked at the Vermont Energy Investment Corporation (VEIC) for the last two years. She manages public relations for the organization and has a particular focus on supporting the work of Efficiency Vermont, the statewide energy efficiency utility operated by the VEIC.

Before joining the VEIC, she served on the staff of Senator Bernie Sanders for six and half years leading his Vermont outreach on energy and environmental issues. With that I'll turn it over to Kelly, thank you.

Kelly Lucci: Hello and thank you Emma for including us in the Webcast today, I really appreciate the opportunity to speak and then learn from all the others.

Slide #2: Efficiency Vermont

Kelly Lucci: As Emma highlighted I work with the Vermont Energy Investment Corporation and we have operated programs in Vermont for the last ten years,

One of the key programs that the Vermont Energy Investment Corporation has operated for about a little over a decade now is a statewide program focused on demand-side management for electric usage. Having been around for more than a decade now we're in a place where there is a lot of knowledge of what we do and how you can participate in our programs perhaps not a lot of knowledge about the wide-scale impact of that. So I wanted to just share a little bit of our experience in the last couple years trying to do some broader education and perception with key influences in Vermont, to help drive participation in our programs.

Slide #3: Efficiency Vermont

Kelly Lucci: Efficiency Vermont as I said is a statewide program focused on electricity efficiency and we also do thermal efficiency and it is funded by a charge on electric bills in Vermont. It's pretty widely considered a model of successful energy efficiency programs.

Slide #4: Cumulative Impact of Efficiency on Growth in Annual Electrical Supply Requirements

Kelly Lucci: Now if you take a look at our broad impact over the last ten years you can see that it actually amounts to quite a lot. The red segment on this graph shows the cumulative impact of energy efficiency on electric needs in Vermont and at this point just to kind of sum up where it is; we're at about 13 percent less electricity than we would otherwise be as a result of these programs. That means less need for new transmission lines, new power plants, and everybody saves.

So context on that 13 percent: it is enough to power the entire city of Burlington, which is a largest city in Vermont. Small nationally but large for Vermont, it's enough to power that entire city for 12 years. So it's really added up to quite a lot.

#### Slide #5: Cumulative Impact of Efficiency on Growth in Annual Electrical Supply Requirements

Kelly Lucci: The next slide shows what a good deal energy efficiency is for this state. (even though the charge on people's electric bills has been a source of friction really from the beginning of our program). You know when you add up all the costs and you compare it with the cost of generating and transmitting electricity we're actually at less than half of that. So it's a good deal and it's cheaper than buying power.

So this is kind of broadly why Efficiency Vermont exists. So the question then goes with a range of programs touching the residential, the commercial sector, and really every single person in Vermont with brand recognition in the state that's over 70 percent. We've demonstrated success in meeting the goals of our program; now what are the communication challenges that we see ourselves facing.

#### Slide #6: How Do You Tell the Full Story?

Kelly Lucci: I think the key word is if you only know us through participating in our programs then you probably have a fairly narrow view of the impact of Efficiency Vermont and the benefits that we provide to the state. You're perhaps more likely to challenge the necessity for energy efficiency for the state as a whole, that investment that we're all making on our electric bills. So you really don't know the full story.

Our goal over the last couple years has been to address that challenge by helping to do some broader perception building and engagement with folks so they understand why the state has made this choice to invest in efficiency and the impact that that's really having, whether they participate in our programs or not.

#### Slide #7: Who is Are Target Audience?

Kelly Lucci: We stepped back and asked a couple of key questions, which are in the framework that Emma presented at the beginning. We said if we want to build perception in the state and get people to understand the value, we need to go beyond the targeting that we've done for the audiences for our programs.

We want buy-in from decision makers and policy makers and we want support from the folks from the state on energy issues and they should really be our natural allies. So our targeted audience becomes legislators and policy makers, local energy groups and other folks who are really engaged at the community level in Vermont. We have more than 200 town energy committees and/or coordinators who are working on a local level knocking on doors and engaging in person-to-person outreach on sustainable energy.

Slide #8: We Become Our Own Storytellers

Kelly Lucci: And then there are a lot of other folks engaged in the Vermont energy sector, utilities, and other non-profits who are working on efficiency. How can we make sure that our message is getting out to them and that they understand this investment the state has made?

Then we sort of talk through what are the most effective ways to reach them, working on a state wide basis, and I think we have the opportunity to leverage onto media a little more than with one targeted specific program. So we know key media outlets that policy makers are engaging with. Vermont is a small state so there's a lot we can do with our professional contacts, or person to person outreach and social media.

Then we asked ourselves: what motivates these folks? Especially for the key policy makers what they want to know is that Efficiency Vermont is delivering value to the state. They may come to that conversation with a perspective that is a little bit critical based on the fact that there is this energy efficiency charge. But we want to engage with them and have a conversation about what that investment really means for the state.

Then folks who are working with us in the local level, they really want to maximize the value that they're getting – you know how can they help businesses and homes in their communities benefit from energy efficiency? How can they expand that value at a local level? So in approaching these challenges as I said we're a mature program.

A lot of people in Vermont have been touched with our programs; have engaged with us over the years. Whether from buying a CFL at a discount or installing efficient appliances in their home or upgrading lighting in a business, so there's a lot of stories that are out there and how do we

tell them effectively in a way that's not just about "we want you to buy into the program a little more." We actually want to engage with you on a higher level.

#### Slide #9: Efficiency Vermont Blog Readership Trends

Kelly Lucci: So our first priority has been to build out content that highlights our broad impact on the state and shares kinds of strategies, our thinking and our expertise on energy issues. Our first effort in the last year to look at this has been through the development and launch of a new blog and a series of white papers, really looking further ahead to the state and how we can leverage a lot of the planning and the goals that have been set on a state wide level. And look into exactly what is going to be needed to meet those goals.

#### Slide #10: What Have We Learned?

Kelly Lucci: But really what we're launching in these new challenges is that we're becoming our own story-tellers. We're showing our value rather than just telling people we have value for the state. Some of the tactics are really thinking like a journalist. Don't just assume that people want to hear what you want to say, really try and be engaged in the conversations that they're having and find ways to deliver content that is of value and interest to them.

So, be transparent about the goals and the strategies that we're pursuing. Seek out those compelling anecdotes and statistics that really highlight the impact that we're having. And engage readers by asking their opinions on what they want to learn from us. So those are the general tactics that we've pursued through storytelling here.

If we look at the impact that we're seeing in terms of readership trends, which are the easiest numbers to pull, we are seeing numbers that are small because it is Vermont. But we are seeing a steady kind of growth in terms of engagement with readers. We're getting, it's not captured on this slide but, we're getting more comments. We're starting to do interactive polling and we're seeing a steady increasing trend over the last couple of years and we feel like that's one of the best endorsements we can have in terms of the content that we're putting out there.

The other key piece that I think is helpful to point out in the context of this slide is: it is an iterative process as we highlighted earlier in these presentations. So we're developing content that we're putting out on our own channels, but that's feeding into our outreach to earned media.

We're leveraging it on social media and it's giving us great content that we can say in our person-to-person and professional networks in Vermont, that we never had digitally before when all of our messaging was focused just to get people to participate in programs. Now we're telling a wider story and we're able to use the content that we've developed to really enhance that.

So what have we learned, just some of our key learnings have been around understanding that it's about the quality of the content we're developing rather than the quantity. You know we'll find that when we do fewer posts, but posts that we're really proud of and that we really feel like give it that deeper value story. That's when we tend to have more engagement and more interest and more readerships.

We've also found that big picture stories tend to resonate with folks, some of the topics we've done have been around home energy labeling and that generated a really engaged conversation among our readership around what that could mean for Vermont. If we show what the mile per gallon rating for people's homes are, what impact that would have on home sales?

And it's been really interesting to see feedback not just from folks who are engaged on energy issues everyday, but from folks perhaps who were only aware of Efficiency Vermont through our programs originally, now are starting to get more interested in this bigger conversation.

The other key point though I think is important to emphasize is that this enhances but it doesn't replace program-based promotional efforts and we never intend it to do that. It's about broader building of positive perception, really helping people understand what is going on and why Vermont has decided to make a big statewide investment in energy efficiency and why it is a great deal for them if they participate in some of the other programs that we offer on the residential and commercial level.

Slide #11: What Can You Do?

Kelly Lucci: So what does this mean for folks out in the wider world trying to think about what tactics and what channels might be effective for them in terms of communicating their program success? You know I think there isn't a one-size-fits-all approach, but some of the key understandings that we've walked away from are going back to the framework that Emma highlighted: doing your homework first, really evaluating what your broader strategy and goals are. And segmenting your audience based on that, evaluating them and catering the content and stories that you develop to speak to them, don't neglect that bigger picture impact of your program. It's not always just about reporting on the key successes you've had within the program but how does it fit into the broader picture. I think if people are more interested in energy issues and more concerned about climate changing and global warning, the more we can highlight how all of these impacts are feeding into a broader effort, the better off we are.

So don't neglect the bigger picture, collaboration with people who are out in the field implementing programs is key to finding and sharing great stories. And also stakeholder buy-in on this kind of long-term effort is really critical. We know when we're watching a blog or investing in white papers, it takes a lot of time and patience to develop quality content.

And just knowing if you have done your homework and you know that this is going to be effective method for you, you are making that investment and your stakeholders need to be engaged and bought in and understanding that it may not turn around results immediately but you are really investing in the long term and making sure that makes strategic sense. That's been our experience here.

#### Slide #12: Contact Information

Kelly Lucci: So that sums it up, again I appreciate you including us in the program today. If folks have any questions they can feel free to follow up with me directly at this contact info.

Emma Zinsmeister: Great thanks Kelly, that was an excellent presentation. If anyone has any follow up questions for Kelly or any of the other speakers please go ahead and enter them into the GoToWebinar control panel and we will get to those at the end of the Webcast.

I just wanted to reiterate a couple of things that Kelly said that I thought were really great points. She stressed the value of anecdotes as well as statistics and I think in the realm of storytelling it's just so powerful to have direct feedback of the experiences of program participants. And I think some of the other presentations today highlighted that as well; being able to convey a compelling story is something that's really huge for the results of a program. So thank you for pointing that out.

And also again reiterating the fact that this is an iterative process and I think the frameworks in all of the examples today have really set on that as well.

## Poll Question #5

Emma Zinsmeister: We'll go to our last poll question for the day. And as Kelly mentioned in her presentation, Efficiency Vermont has as a mature program figured out some of the best ways to convey successes. And I think they've come up with a pretty effective and compelling model.

What other stumbling blocks and challenges have communities faced in getting the word out about your programs? So if you can all take just a moment to provide us with some feedback via the poll, we'd greatly appreciate it.

All right I think we can go ahead and pull up our poll results. So it looks like just about half of the folks on the line have really struggled with a lack of capacity and not having dedicated outreach person and I do think that's something that we hear from a lot of the communities and states that we work with, and hopefully the strategies in this series have helped to provide some ideas about how folks can work with the resources that they have.

There are also some answers that resonate with folks that a lot of programs are new, and not quite at the point where they're ready to start sharing results but it's important, a point I think Keith stressed is to think about this early on in the program: how you're going to be reaching your stakeholders and what kind of data you do need to be collecting along the way.

So thank you to everyone for providing your feedback.

## Panel Discussion

Emma Zinsmeister: Before we go into question and answers based on the audience questions, we're going to move into the panel discussion. My first question is for both Keith and Kelly. Thinking about the topic of mentorship and working with other communities to promote replication of the work that the HEAL program and Efficiency Vermont are doing, can you provide some advice on how to be an effective mentor when sharing this information with other agencies and organizations that are interested in replicating your program?

Keith Canfield: OK, I'll jump in and go first and give Kelly a breather for a second. You know we're big fans of Efficiency Vermont and what they've done in Vermont. Down here in our neck of the woods we're not quite as mature from an energy efficiency standpoint. So we think it's really important to reach out to others like ourselves, other states or other municipalities, and really have an open dialogue about how we figure this out for our regional areas.

And to be very upfront and honest, we have some pieces of puzzle that we think are pretty compelling. But there is a lot that we don't have figured out. Being open and willing to, as we say, "have people tell us that our baby's ugly," we're OK with that, that's how we learn and that's kind of the feedback we want to have and get.

Kelly Lucci: Yes, I think Keith made a great point. It's really being open to engagement and willing to accept that criticism as a real opportunity for improvement and allows you to refine your efforts even further. The other piece I would emphasize is it's not a one-size-fits-all solution and there is just no substitute for doing that homework from the start.

In terms of the efforts that we're making we know these are long term and if we don't do that work in the beginning we could be wasting our time and energy on channels that we thought might be great but that aren't actually going to have the impact we were looking for. That would just be the key take-away for me.

Emma Zinsmeister: Thank you for those insights, my next question is for again, Kelly, and also Karina and Elizabeth and Eileen -- and of course Keith if you have thoughts you can jump in too. How can folks incorporate storytelling in the tools that they use to promote the success of their programs? And what makes storytelling a particularly effective means of communication? We've touched on this a little bit but I think the specific thoughts you have would be appreciated.

Eileen Quigley: Well this is Eileen and Elizabeth. I guess that I would say that we think that storytelling is crucial to the work we do, particularly given the technical side of a fair amount of it. And so that storytelling is the way that we get people's attention. Also I think people learn

with stories and we at Climate Solutions have a project called Solution Stories, which are two-minute videos people submit using our website. We encourage people to use as many images as possible in kind of a crisp, almost journalistic style, is very important.

We also use the case study approach as I mentioned during the presentation. We found that that is very important because you're able to tie together a lot of information, hopefully in not a dry manner. But then you can reuse that information in lots of different ways.

And we do we repurpose all of the information in lots of ways, so I think telling stories is crucial in the way that we deal with highly technical, at times highly technical material that can be dry and complicated. We're constantly looking for ways to demystify clean energy and climate solutions.

Kelly Lucci: I think that was a really great point. How can we make this approachable and accessible and help these stories really resonate with people. I think highlighting that journalistic perspective as well is really important. I mean the key is that we want our stories to show and demonstrate value, rather than just telling people that we have value. It means putting in that extra effort up front to think about the channels and the presentation and the information that you're sharing, that it really is compelling and interesting for people.

It's something that they want to engage with and we found that really highlighting through case studies and stories the perspectives of folks who have worked with us and framing up questions that are designed to really get feedback has been a much more effective way of drawing in folks than just telling them at a high level what we've achieved.

Karina Castillo: I would like to say that the points that Elizabeth, Eileen and Kelly made are very good. I also want to stress the fact that storytelling is one of the most effective means of communicating your success. We tell our project participants that they should never underestimate their power to influence. And it's really beautiful when you hear it from the people that are not entrenched in this daily work.

I think stories have the potential to really resonate with people in your community, your local leaders, and it's an effective way of communicating your success, we believe.

Emma Zinsmeister: Great thank you for those insights, my last question for our panel speakers today and in particular I think Eileen and Elizabeth may have something to add on this. What are some low-cost yet effective methods that state and local governments can use to share their programs success with others that may be interested in replicating their work (given that many programs are operating in a resource constrained environment)?

Eileen Quigley: I think that one of the lessons that we learned over the last four years (as indicated by the logos that I displayed earlier when I was showing you all the places we've been, scattered all around the North West) is that one of the most effective methods of galvanizing and organizing state and local governments is geographically clustering our work.

By creating these geographic clusters centered around Seattle and around Portland, but aligned upward with all state and regional policies and then locally to have the communities that are next to each other or close enough-- they are already collaborating, either because they have to due to transportation needs or other regional matters.

They're already sitting at a lot of different tables having conversations about how they can best serve their citizens and residents. And it's turned out that since those tables are already set, we just needed to make sure we've brought our appetizers and entrées at times. That's been one of the most important epiphanies we've had recently.

I think the aggregation of demand is another piece; having nine cities in and around King County all paying to the same utility that's serving them or two utilities. We are all moving in the same direction, rowing in the same boat. "We need your help." That is much more powerful than having a city of 20,000 or 30,000 saying to the utility we want you to invest more in renewable energy or whatever the request is.

They're also able to share resources, there is great opportunity and expertise among all of these cities that we're working with; they have a lot of skill that they're developing. But they develop them in silos and one of the things we are trying really hard to do is break down those silos because the budgets are so constrained in what they can do in smaller cities. In particular they may not even have a sustainability director, much less a climate planner.

We try very hard for scalability and replicability here and this one of the ways we've been working on that. By having the cities that are right next to each other share and collaborate.

Elizabeth Willmott: This is Elizabeth and I would also add that the state and county governments also play a really valuable low cost convening role. That's what we have certainly seen with the King County City Climate Collaboration. They don't have to expend a lot of energy to provide resources and share best practices among their cities. Simply convening that table goes a long way.

## Questions and Answers

Emma Zinsmeister: Thank you. I think now we'll start taking some questions from the audience. Before we go into that, I just want to mention to folks on the line that our communications framework is up on the screen and I know people are probably going start dropping off the line as we near to 2:30.

As you leave the Webcast today there's an option to provide some feedback through some questions that will pop up on your screen, the first of which will focus on your reactions this framework. Just a reminder to folks to take advantage of the opportunity to provide us with feedback as you leave today. With that I think we can jump in to the question and answer session.

We'll start off doing one question for each speaker and if we have time we'll go into more.

Lauren Pederson: OK, great, thanks Emma. I'm going to start in the order of the presentations. Karina, the first question that we received for you is; the participant thanks you for an excellent presentation and was wondering based on your experience if there were other environmental issues that have been addressed by the PPC (promote, provoke, and celebrate) method that you presented on.

Karina Castillo: That's a great question. I cannot speak directly to any environmental issues that have used this strategy. But I can tell you that with climate change being such an umbrella topic that covers your food and water and national security issues that really I would say that it can be applied to any other environmental issue. When you want to engage people, PPC, I think, is the most effective method. As long as you promote, provoke and celebrate people are always willing to come to the table.

And they're happy to be a part of a bigger issue and a bigger organization. And we found this has been really effective and growing our program. I think that method can apply to any environmental issue.

Lauren Pederson: Great, thank you Karina. The next question is for Eileen and Liz: Have you equated the GHG reductions to cost savings? Where I work the most effective presentations are ones where we can show monetary benefits.

Elizabeth Willmott: We have not although we have noticed that there are excellent examples around the country of communities such as Burlington, Vermont who have looked at costs

associated with different greenhouse gas reduction strategies. In Burlington I believe a consulting group named Spring Health Solutions actually adapted some analysis the Mackenzie Group had done, and applied that to a community process that included different greenhouse gas reduction strategies. But we have not [equated the GHG reductions to cost savings], specifically.

Eileen Quigley: Well we haven't in Beaverton and Issaquah with the energy map and (GHG reduction) that we've done, just in terms of where they are in their process; they're still testing their strategies and their pilot programs. We did do that work for sure in Jackson, Wyoming, and in Edmond, and in a couple of other places such as Albany, Oregon, but in specific projects only.

For a specific energy efficiency project, a specific community filler project and a specific waste to energy project in Edmond, we looked a lot at the costs and the benefits and the GHG reductions and all of that, on a project-by-project basis. In 2014 that is most definitely where we will head because our aim in 2014 is to see the sustainable energy strategies implemented. And you have to figure out the cost to make that happen and also obviously the funding, as well as the partnerships with the utilities and the government and the business community and the citizenry.

Lauren Pederson: Thank you for that response. The next question for Keith. Has the HEAL concept been piloted at the federal level (i.e., on a bigger scale such as partnering with a credit union)?

Keith Canfield: In terms of federal government level, no. But that would be an intriguing possibility, wouldn't it? On a national level in terms of rollout and multiple jurisdictions we have had some interest from employers, but interestingly not from credit unions, so if you have a credit union that does have a national footprint, or some federal agency that would like to try the HEAL program, we would love to talk to both of them.

Lauren Pederson: All right, thank you. Then lastly for Kelly we have this question: Looking at your graph of your blog, what happened, for instance in March 2013 that resulted in the spike in interest?

Kelly Lucci: I think we kind of got our feet under us and really started doing more promotions through our social media and we were able to leverage a couple of earned media placements to bring people to the blog in March. Then you know it's just a funny thing when we work on energy efficiency, there are times that people tend to be interested in the year and I think we had some cold weather, so there were more people coming to our site overall.

Emma Zinsmeister: Great. Thank you everyone for your responses to those questions. We did receive several more questions from the audience which unfortunately we're not going to have

time to get to on the call today. What we'll do is we'll make sure that all the speakers get those questions, and can provide responses in writing. So we will post responses to our Web site along with the audio and the copies of the presentations, in the coming weeks.

Thank you everyone for staying with us through the Webcast and for participating in the series. We greatly appreciate the time and expertise of all our speakers and the participation of everyone on the line. If any additional questions come up about EPA's program the state and local climate and energy programs, feel free to contact me and I can also get you in touch with the speakers if you have additional questions that come up about the presentations you saw today, later on.

Thanks again be on the outlook for updates for our e-mail newsletter of upcoming topics that we will be covering in the New Year, so with that thank you and go ahead end today's call.

**END**