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Marketing and Promotional Plan

Final Report



Bonneville Power Administration • Hood River Electric Cooperative
Natural Resources Defense Council • Northwest Public Power Association
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MARKETING AND PROMOTIONAL PLAN

Final Report

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September 1985

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Prepared for
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Introduction

The Hood River Conservation Project (the Project) is a research effort designed to identify and document the potential of residential electrical energy conservation in a limited geographic area over a short period of time. The Project will determine the levels of achievable penetration of various energy conservation measures when offered through a vigorous marketing program. The Project, initially proposed by the Natural Resources Defense Council, is sponsored by Bonneville Power Administration (Bonneville), and operated by Pacific Power & Light Company (Pacific) in cooperation with the Hood River Electric Cooperative (HREC).

The weatherization measures to be marketed represent higher levels of retrofit than are currently available through existing programs in the region. These measures will be provided virtually free to all qualified residential customers within the Hood River study area. The effectiveness of the marketing program will be assessed by means of a comprehensive evaluation program.

In general, a marketing plan is a document recommending future action based upon an analysis of both the current market situation and of the product involved. It is also known as an "action plan." The marketing plan brings together all elements involved in the development and implementation of strategies used to market the product. A promotional plan is based upon the promotional and advertising requirements of the marketing plan.

Project Objectives

The principle objectives of the Hood River Conservation Project are summarized as follows:

1. To determine the maximum realizable penetration rate of potentially cost-effective residential weatherization measures.
2. To determine the impact of the conservation measures at both the individual customer level and the utility transmission/distribution system level.

3. To determine the effectiveness of selected marketing approaches.
4. To assess the characteristics of community dynamics under the conditions of a maximum conservation effort.
5. To determine the costs associated with the development and implementation of a maximum conservation effort.

Marketing activities will "trigger" community acceptance and individual homeowner participation in the Project. As such, these activities will frame the arena within which the essential research will be conducted.

Marketing Plan

As utilities and service organization adopt the marketing concept, planning is needed. It is necessary to lay out the steps necessary to achieve goals as well as to identify outside factors that may affect performance.

Following a brief discussion outlining the major components of a marketing plan, the marketing plan for the Hood River Conservation Project is presented as an example of how marketing concepts can be used in planning to ensure program success. The plan addresses both internal and external organizations involved in weatherization planning, research studies, and regional programs.

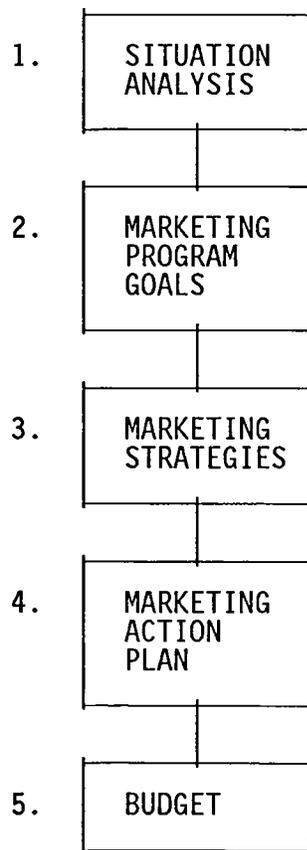


Figure 1. Steps in a marketing plan.

A marketing plan is a working document which analyzes past experience and recommends future action. The plan starts with a situation analysis. It is here that the question might be asked: "Where are we now?" The plan examines the key features in the environment that could have an effect on program implementation. Marketing plans must be tailored to individual situations and may include some or all of the following elements:

Situation Analysis

External environment

The external environment affects the attainment of marketing goals. These factors are outside the scope of the planning process and may be political, regulatory, economic, social, or technical in nature. The organization may or may not have some control over these factors, which include:

Consumers: A study of the size and composition of the current and potential market(s). In this section, "segmentation bases" (delineation of special groups), and consumers' awareness of and attitudes toward the organization and its offerings might be included.

Employees: The role of employees in fulfilling the marketing plan.

Distributors: The nature of the relationship between organizations and their wholesalers and retailers.

Competition: Industry success factors and competitive structures.

Internal environment

Internal factors which are central to the creation of marketing goals include:

Objectives: What are the organizational objectives? What does the organization want to achieve?

Risks & Opportunities: Identification of risks or threats and opportunities ranked in order of importance.

Strengths & Weaknesses: Identification of organizational strengths and weaknesses in product design and corporate environment.

Marketing Program Goals

After working through the situation analysis, the company should be in a fairly good position to determine marketing goals. Marketing goals are used to help ultimately meet organizational objectives, and should be specific, quantifiable, realistic, and attainable. Goals should be prioritized and time frames assigned for completion.

Marketing Program Strategies

Marketing strategies are created using "positioning," or differentiation of the products or services, to outline how the goals may be achieved:

Positioning: Statement of the image to be conveyed to customers or competitors, and description of the needs the product or service is filling in the marketplace.

Marketing Mix: Positioning strategies are implemented through elements of the marketing mix: product, price, distribution, and promotion.

Contingency Strategies: A list of strategies addressing what should be done if marketing goals are not met, or if crisis situations arise.

Marketing Action Plan

The action plan contains a detailed breakdown of activities that may be implemented for each goal or strategy, including tangible and intangible results expected from each activity.

Marketing Budget

Costs should be identified for the various marketing functions. Areas which might be considered include: resources, money, people, and time.

THE HOOD RIVER CONSERVATION PROJECT MARKETING PLAN

Situation Analysis

Overview

The Hood River Conservation Project (the Project) is a research and development effort designed to identify and systematically document the effects and potential of conservation when implemented within a limited geographic area during a short period of time. The study will identify the levels of penetration that can be achieved by vigorous marketing of residential conservation services and measures.

The conservation measures to be offered represent a higher level of retrofit than are currently available through existing federal, state, and utility programs. These measures will be provided without direct expense to qualified electric customers within the study area. The information which results from the study will provide vital data to those involved in long-range regional energy planning.

Background

The Project evolved out of needs identified following passage of the Pacific Northwest Electric Power Planning and Conservation Act (the Act). Under this legislation, the Northwest Power Planning Council (Regional Council) is required to prepare a plan which defines how the region's long-term power needs will be met. The Act specifies that Bonneville must develop conservation and renewable co-generating resources to the maximum cost-effective extent before turning to conventional forms of power generation.

Unfortunately, there is much about the potential of conservation that is unknown or is based on limited experience. The Project is designed to answer many of the key questions essential to the creation of a responsible and reliable regional energy plan.

The Project is a joint effort of Pacific, the HREC, Bonneville, the Natural Resources Defense Council, the Regional Council, the Pacific Northwest Utilities Conference Committee, and the Northwest Public Power Association.

External

Consumers

Within the targeted 3,100 households in Pacific and HREC service districts, several community groups (segments) are defined. They include five distinct community groups plus three groups involved directly in Project experimental studies.¹ These groups exhibit distinct attitudes, some of which may affect the Project goal of 100 percent penetration. These groups are:

- 1) The Business/Executive Community
- 2) The Counter Culture
- 3) Orchardists
- 4) The Working Class
- 5) Residents of Mosier
- 6) Research Groups
 - A) Load Study Group
 - B) House Doctor Sample
 - C) Mobile Home Residents

The Business/Executive Community. This includes business owners and managers in the Hood River area. It appears that most members of this group live in town and the Lower Hood River Valley. Members of this group are very cost-conscious. Many have already done some weatherization of their homes. This group should be receptive to the Project, although some resistance may be expressed by those who have previously weatherized their homes, or from those who use gas or oil for space heating.

The Counter Culture. Approximately 1,000 people in the county live a non-traditional lifestyle. Many have moved to the Hood River area for the quality of life. Most have labor, social service, or craftwork jobs to support their lifestyle. This group conserves energy as part of their philosophy. There will be no problem getting members of the Counter Culture to participate in the program.

Orchardists. There are about 15,000 acres of orchards in Hood River County, with over 300 commercial orchards throughout the upper and lower

¹Brown, Cynthia Flynn (1983). Community Assessment, Preliminary Report, Hood River Conservation Project, DOE/BP-11287-15.

valley. The Orchardists are important to the Project because they are responsible for the weatherization of three groups: themselves, the seasonal migrants, and the settled-out migrants. Seasonal and settled-out migrants generally live in housing owned by the Orchardists. The Orchardists should be interested in Project participation primarily for economic reasons.

The Working Class. It appears that the working class is a large group, located in the city of Hood River and in the valley. This group is inclined to distrust government and utilities. The Project may encounter resistance from working class members who have completed weatherization or are not eligible for the Project.

Residents of Mosier. Mosier is a small community to the east of Hood River. It is not located in Hood River County, and its 1,100 citizens do not identify themselves with the Hood River area. Approximately half the residents of Mosier are retired people, and most of the rest appear to work either in The Dalles (in Wasco County), or as orchardists. Project acceptance should be high, as these people are interested in saving money by weatherizing their homes. However, a proud attitude of independence, which appears to occur throughout the study area, seems especially prevalent among retired Mosier residents. This attitude could affect their acceptance of the program.

Research Groups. Within these community groups, Project research groups with their own special needs have been defined. These include the load study group, a random sample of 320 households equipped with end use monitors in their homes. Four aspects of kWh usage are monitored: space heat, total load, indoor air temperature, and water heat. Wood stove monitors replace water heat monitors at 100 of these sites. The house doctor sample includes a randomly selected group of 150 households. These homes receive "envelope" conservation measures which reduce infiltration, such as caulking and weather stripping leakage sites. Structural performance is measured before and after treatment. Mobile home residents make up a third special group. Measures applied to these homes are experimental in nature, and may cause a delay until Project specifications become defined. Households in the three research-defined groups may be inconvenienced at times due to the experimental nature of their involvement. They receive no specific compensation for participation, and have been subject to Project delays which are perceived by some as Project inefficiencies.

Employees

The marketing plan for the Hood River Project is developed and monitored by the Research and Evaluation team, which is based at the Pacific corporate headquarters in Portland, Oregon.

Implementation of the plan is the responsibility of the Hood River Project Field Office in Hood River, Oregon, in coordination with the Research and Evaluation team.

Industry success factors

Factors which constitute a successful Weatherization program may vary from region to region. Within the Pacific Northwest, a successful program is defined as one which meets objectives, completes weatherization work to specifications, and provides an information function to consumers. The "rules of the game" are clear -- all cost effective measures are installed in a timely manner with few repairs. It is important that program management is sensitive to special needs of customers, contractors, and installers, while being flexible enough to deal with special cases.

To improve cooperation, successful small community strategies should be implemented. For example, key individuals who are long-time community residents can be invaluable in program planning. Use of (locally trusted) active community government is also important to this function, as is working with local media to publicize progress and results in the community. In addition, results should be publicized regionally.

Internal

The internal environment defines the Project's strengths and weaknesses, and its opportunities and risks. These elements influence the development of Project objectives:

Strengths

- * There is a general level of awareness of the program.
- * Measures are provided virtually free for qualified households.
- * The program cost-effectiveness ceiling is higher than other past programs.
- * Management has many years experience in serving the community of Hood River.
- * Local residents were used in Project planning.
- * A local Project Center was established as the focus of administrative, research, and weatherization activity.
- * There is an interest in weatherization in the study area.

Weaknesses

- * A negative attitude towards government and utilities is evident.
- * Residents could incur financial costs before homes can be weatherized.
- * Minimal incentives are available for non-electric households within the Project area.
- * There is no real compensation for Project research study participants.

Opportunities

- * The conservation retrofit potential of an entire community can be analyzed.
- * There is a potential for reduction in kWh usage.
- * Residents may benefit from increased home comfort provided by weatherization.
- * High participation rates are possible.
- * Good community relations for utilities and government are possible.

Risks

- * Consumer distrust of government and utilities exists.
- * There is a potential for hostile feelings because some customers are not included due to non-cost-effectiveness or fuel type exclusion.
- * There is no specific compensation for participation by the load study group, aside from Project weatherization to cost-effective levels.
- * Negative perceptions are possible due to the potential for poor quality installation or slow processing of weatherization requests.

Objectives

The Hood River Conservation Project seeks to achieve the following objectives:

- * Determine the maximum reasonable penetration rate of weatherization participation and measures within a limited period of time (between March 1984 and December 1985).
- * Determine the relative effectiveness of varied approaches to conservation marketing.
- * Determine the costs associated with the development and conduct of a maximum conservation effort.
- * Determine the characteristics of community social interaction and impacts under maximum conservation conditions.
- * Determine the effects of conservation on distribution and transmission systems, load management, and savings.

Marketing Program Goals

To meet the Project objectives, the following goals have been identified:

- * Increase awareness, acceptance, and support of the Project within the Project boundaries.
- * Generate a level of requests that will achieve maximum participation in the Project by December 31, 1985.
- * Develop a strong employee and contractor commitment to serve as the foundation upon which to build a variable and effective community-based effort.
- * Position Bonneville, Pacific and the other entities involved as innovative, knowledgeable, and credible managers of electric energy, working in the best interests of citizens of Hood River, the region, and the country.
- * Develop a strategy designed to neutralize the possible impact from those parties that are not eligible to participate.
- * Develop strategies to satisfy post-Project community commitments.

Marketing Strategies

Positioning

The weatherization "product" should be repositioned as "cost-effective" weatherization, and the definition of cost-effective made available to households with electric heat. Project audits should be positioned as a benefit which are available to everyone.

Core benefits of increased comfort, including reduced noise, must be stressed, rather than savings (which vary with individual households).

Product

Project weatherization is providing benefits that meet customers' needs, for example, increased comfort or a decrease in monthly fuel consumption. This product is not available to all members of the target market because only cost-effective homes (where kWh savings are greater than unit cost) will be permitted to receive full product benefits.

Weatherization should be presented as several products, directed at the specific needs of target groups. Residents in cost-effective homes are offered free Project weatherization, with enhancements at added cost. Non-cost-effective homes may receive the same package if homeowners are willing to pay the balance between unit cost and savings. Mobile home owners receive a specially tailored weatherization package, while all groups may receive Project electric or non-electric audits.

Availability

In the future, weatherization should be made available, as in the past, through the Project office in Hood River. In addition, as the last potential participants become more difficult to reach, Project weatherization contractors may solicit program involvement.

Marketing communications

As presented in the Hood River Project Promotional Plan, information concerning Project weatherization will intensify until penetration goals are met. Attention must be paid to special Project groups including the load study and house doctor samples, mobile home residents, and hard to reach groups. Literature should reflect positioning strategy.

Controls

Performance against marketing program goals will be measured in terms of audit requests and completed weatherization jobs. When the rate of increase for these measures declines, marketing communications will intensify and target especially difficult to reach groups.

Contingency strategies

Possible problems and contingency strategies have been identified.

Cancellations

If the cancellation rate exceeds five percent in any three month period, remedy through personal contact using Project field staff.

"Revolt of the working class"/ineligible non-electric

Interview members of this community group to ascertain the nature of complaints. Remedy through personal contact using influential local persons.

Potential indoor air quality problems

Monitor the home for radon levels. Interview all affected households and document the severity of the situation. Install properly sized air-to-air heat exchangers at no cost to the homeowners.

Positive radon levels

Notify the customer and Bonneville immediately. Send team of experts to isolate and document source(s) and severity. Mitigation options include the removal of weatherization if necessary, or installation of a properly sized air-to-air heat exchanger to restore the home to pre-weatherization air change levels. Sub-slab depressurization may be an alternative remedy. Communicate finding using local media and organizations.

Marketing Action Plan

The following goals are the yardstick by which this marketing plan is monitored. Specific strategies and tactics are presented to ensure clear understanding of each goal.

GOAL: To increase awareness, acceptance, and support of the Project within the Project boundaries.

Assumptions

Local news coverage, Open House activities at the Center, and limited paid advertising since the Project began have created awareness of the project to many citizens in the county. The level of actual Project knowledge is not known; however, it is monitored over time.

Strategy

Establish the Project Center as the focus of administrative, research, and weatherization activity.

Tactics

Continue to utilize the logo that was developed for the Project.

Coordinate the local business/professional groups like the Rotary, social organizations like the Elks, and schools for walk-through Open House activities and status updates on a regular basis. This will give a local involvement with an "Our door is always open" feeling.

Develop a literature display for easy access for citizens that just want information without personal one-on-one contact with office staff.

Ensure that office staff is kept updated on the Project's status in order to answer any and all questions.

Employ and regularly update the aerial photo map as a visual status report of activity.

Strategy

Develop a consistent communications program that will visually increase awareness and at the same time raise the understanding level of the Project.

Tactics

Continue to employ the Project manager's news column on a consistent basis in the Hood River News. If not every week, at least on an every-other-week basis, the column should carry up-to-date status reports of the last week's or the future week's activities. It should answer questions -- who is eligible, why Hood River, etc., as well as give progress reports. Its style should maintain a low-key, local feeling.

Expand outdoor advertising to reach traffic coming from both east and west on Interstate 84, as well as from the south side of town.

Develop radio spots to report the Project activities and answer questions. Have Project personnel interviewed on the local radio talk show to answer questions in person.

Maintain lawn sign program and ensure contractors utilize same on a consistent basis.

Maintain vehicle sign program and have an adequate supply for all vehicles. This acts as a moving outdoor board of the logo.

Regularly participate in such activities as the Hood River County Fair, Cherry Blossom Festival, etc., with the portable display unit that has been developed.

Place advertising in the annual Hood River News "Panorama" and other special editions.

Develop simple line art of the Project logo and reproduce as coloring sheets for children.

Display poster of logo in as many public centers as possible.

Encourage use of the logo patch for clothing and caps with employees and contractors.

Strategy

Utilize and guide the Citizens Advisory Committee to enhance the success of the Project.

Tactics

Conduct regular committee meetings at the Center in order to maintain local involvement and support for the Project.

Utilize each member of the committee as an information conduit to reach the constituency they represent.

Utilize Pacific's local manager, the HREC manager, and members of the committee in a series of radio spots to endorse the Project.

GOAL: Generate a level of requests that will achieve maximum participation in the Project over the two year period.

Assumptions

The awareness and acceptance communications activities will be employed, and will generate a certain level of requests for participation.

Strategy

Create communications vehicles that will generate manageable requests for participation in the Project.

Tactics

Develop and place, as needed, direct solicitation ads. The ads would describe the program and have a coupon to be filled out and mailed back to the Center.

Develop and run, as needed, direct solicitation radio spots that would describe the program and ask citizens to sign up.

Develop a series of testimonials from recognizable individuals in each of the target audiences -- professionals/business leaders, blue collar, orchardists, etc. -- recommending participation in the Project.

Develop a direct mail piece that could be mailed to a select market by a geographic or usage variable. This vehicle should be a hard sell as to why participation is important to that customer. It should be designed to include a prepaid return card that would facilitate a reply. After the card is returned, a follow-up letter should be sent to acknowledge receipt of the request and to inform them when to expect action to take place.

Utilize the door-hanger sales piece when in neighborhoods performing audits, etc. The door-hanger was designed with a perforated return card and follow-up activities should follow the direct mail procedures.

Mail a managers' letter from Pacific and HREC managers to customers as a direct mail piece.

Develop a telemarketing plan to quickly spur activity should requests fall off suddenly. Develop a telephone sales call format and train office staff to quickly implement this procedure.

Strategy

Maintain consistent communications with those individuals that have signed up for the Project, but have not yet started the process.

Tactics

Develop a simple card to notify the homeowner when he or she may expect the weatherization process to start. Update and send new card if the situation changes.

Several days before the first appointment is scheduled, make telephone contact to confirm.

Updates in the Hood River News should also help to keep the lines of communications open. For example, running ahead of schedule; due to so much response, we are further behind than expected; etc.

GOAL: Develop a strong employee and contractor commitment to serve as the foundation upon which to build a variable and effective community-based effort.

Assumptions

Normally in an effort of this nature, to achieve maximum participation the agency would recommend an employee incentive program be implemented to the staff that meets or exceeds their "sales" efforts.

Strategy

Use employees of Pacific and HREC as well as contractors and Project staff as ambassadors of good will to enhance the Project's success.

Tactics

Provide adequate Project literature so that employees are well informed.

Allot adequate time in staff meetings, coffees, etc., to discuss the Project and supply staff with up-to-date status reports.

Stress the importance of the Project and encourage them to endorse it with their friends and neighbors.

Use the news column in the Hood River News to recognize outstanding achievements of staff members, contractors, inspectors, etc. Subtle recognitions of this nature will further motivate employees to assure the Project's success.

<p>GOAL: Position Bonneville, Pacific, and the other entities involved as innovative, knowledgeable, and credible managers of electric energy, working in the best interests of the citizens of Hood River, the region, and the country.</p>

Assumptions

The open house and accompanying media activities have generated some awareness about the Project to opinion leaders throughout the region. However, the level of awareness is not known.

Strategy

Develop an on-going public relations program locally to educate citizens about the Project, and regionally and nationally to educate readers, listeners, and viewers about the significance of the Project and its progress.

Tactics

Assign one person as spokesperson for the Project so that the information released is consistent and timely.

Develop a tabloid insert for the Hood River News to be used about six months into the Project. It would not only include information on the Project as a reinforcement, but would be an involving piece: a children's page including puzzles, cartoons and questions on energy issues; a teenagers' page cataloging how much energy their age group uses; and a page entitled "What you can do while you wait" cataloging tips for residents on weatherization and home improvements.

Environmental groups -- statewide, regionally, and nationally -- should be kept abreast of the Project's progress.

Regular testimony and progress reports should be provided to the Northwest Power Planning Council and other regional power interests.

Regular contact should be made with regional and national trade publications interested in weatherization and energy related issues. Case histories of area residents willing to discuss their energy consumption and participation in the Project should be used with these publications as well as overall Project updates.

Other popular publications such as Sunset and House & Garden should be approached to do a feature on an entire community dealing with home environment issues.

The Community Advisory Committee will be a focal point for continued public relations efforts. Additional ideas and support will come from committee members and their contacts within the community, as well as the constituency they represent, i.e., business/professional, blue collar, etc. Regular news releases would be issued about the Committee's work. Timely political and public updating is important to maintain the level of interest that is needed to ensure the Project's success.

A vigorous speakers bureau should be established, directed by the Committee, to book appearances at school, church, business, and community events within the Project area. If appropriate and feasible, other speaking engagements outside the affected area should be coordinated through the Committee and the Center.

GOAL: Develop a strategy designed to neutralize the possible negative impact from those parties that are not eligible to participate in the Project or not satisfied with the package offered them.

Assumptions

There will probably be some resentment towards the Project and possibly toward eligible parties by those that do not qualify for weatherization.

Strategy

Develop a communications program targeted to the citizens of Hood River that are not eligible to participate in the Project, or are in some way dissatisfied with Project offerings.

Tactics

Coordinate, with the local Pacific office and the HREC, the development of a simple direct mail piece that discusses other options to obtain low cost or interest free financing for weatherization.

Have available at the Project Center literature that describes programs for gas or oil heat customers who might stop by.

Escalate home energy audit requests to those not eligible so they will not feel they are the last ones being cared for.

GOAL: Develop strategies to satisfy post-Project community commitments.

Strategy

Develop communications guidelines to address post-Project inquiries.

Tactics

Develop a certificate that acknowledges participation in the Project and recognizes the weatherization measures taken.

Coordinate with local Pacific and HREC offices to ensure follow-up procedures are in place in order to respond to their customers' needs.

Strategy

Recognize the Project as a historic event.

Tactics/elements

Develop a commemorative plaque or memento that will be given to the Hood River/Mosier Community. It should be permanently placed in the City Hall or other appropriate public arena. The award should cite what the Project was about, and thank the community for their involvement.

Budget

<u>Line Item</u>	<u>Total Cost</u>
Direct Labor	
Marketing Materials Planning & Development	12,800.00
Audio Visual Presentations/Reports	47,900.00
Community Relations	20,600.00
Hood River Electric Cooperative Representative	16,776.00
Labor Overhead	
Energy & Conservation Services	5,247.00
Communications Department & Community Relations	28,078.00
Hood River Electric Cooperative Representative	4,481.00
Inventory of Treated Residences	4,500.00
Inventory of Untreated Residences	10,000.00
Special Equipment	3,660.00
Consultants	
Assessment of Project Implementation	39,976.00
Advertising	27,920.00
Printing	49,150.00
Other Direct Costs	9,075.00
General & Administrative Expense	<u>4,649.00</u>
TOTAL	\$ 284,812.00

Promotional Plan

The marketing action plan includes promotional and advertising activities related to achieving program goals. A promotional plan contains those tactics identified in the action plan which are economically and logistically feasible.

A promotional plan is characterized by activities which are initially general and informational in scope; subsequent levels of activity are then targeted and detailed.

The Promotional Plan was developed with detailed knowledge of study area characteristics, and with a view to the potential transferability of the Plan in its entirety or individual components to other regional settings.

The informational basis for the Promotional Plan was provided by resident employees of the serving electric utilities, surveys conducted within the study area by Oregon State University and GMA Marketing Research, and through a systematic Community Assessment performed under contract by Social Impact Research, Incorporated. Professional public relations counsel was provided by the Pihas, Schmidt, Westerdahl Company.

In keeping with the replicability of the marketing effort, the Hood River Promotional Plan incorporates only conventional elements which public and private electric utilities of varying sizes might be capable of undertaking. Finally, the inclusion or exclusion of individual elements and strategies was based on criteria of economic and managerial practicality.

THE HOOD RIVER CONSERVATION PROJECT PROMOTIONAL PLAN

Structure

The Promotional Plan is composed of three interrelated components: advertising, promotional activities, and community activities. Each component is described graphically in Figure 1 and described in narrative form in the following pages.

PROGRAM COMPONENTS		
(A)	(B)	(C)
ADVERTISING	PROMOTIONAL ACTIVITIES	COMMUNITY ACTIVITIES
1 Contract Announcement		1 "Key" Group Presentations
2 Billboards		2 Community Center
3 General Information		3 Community Committee
4 Activity Reporting		
5 Invitation to Participate	1 Bill Enclosure	
6 Testimonials	2 Door Hanger	
7 Progress Reports	3 Manager's Letter	
8 Recruitment Activities	4 Telephone Contact	
	5 Door-to-Door Contact	

Figure 1. Promotional program structure.

Each of the major components and their principle subcomponents are described below.

Advertising

Advertising (paid communications) is important to the success of the marketing program. It will occur on a regular basis utilizing the local newspaper, radio, and billboards. Initial advertising will be general in nature, emphasizing the purpose and goals of the Hood River Conservation Project. Subsequent levels of advertising will, if implemented, focus on Project activities, invitations to participate, participant testimonials, reports of progress, and specific recruiting activities. Each level of advertising is outlined below:

Contract Announcement. A descriptive article announcing contract signing will be placed in the Hood River News. This first official release will provide a general outline of the Project, its objectives, and fundamental organizational characteristics. The article will identify the Community Center as a source for information, but will not encourage or solicit public participation.

Billboards. Carefully located billboards displaying the logo and name will be the first activity designed to announce the presence of the Project within the study area.

General Information. If insufficient response is achieved from the initial contract announcement, the Project Administrator will initiate general informational advertising.

Activity Reporting. This level of advertising will focus on Project activity occurring within the study area. Special attention will be given to the Community Committee and homeowner activities.

Invitation to Participate. Weekly advertisements will be placed in local media which describe specific benefits and invite qualified homeowner participation.

Testimonials. The existing advertising activities will be supplemented with testimonials by citizen participants. Such testimonial will focus on positive experiences with Project staff and benefits received.

Progress Reports. Existing advertising activities will include reports of Project progress and accomplishments.

Recruitment Activities. Homeowners will be actively recruited. Advertisements will request participation, emphasize benefits, and provide registration materials.

"Last Chance" Offering. Newspaper and radio advertising will complete the formal promotional effort by announcing a deadline for Project sign-up. This announcement will confirm to the public that the Project has a definite ending date and should provide additional motivation.

Recruitment Activities

A second component of the promotional structure includes recruitment activities. These direct contact strategies are intended to be employed concurrently with advertising activities -- invitation to participate, testimonials, progress reports, and direct advertising. Each recruitment activity represents an increasingly direct and personal level of homeowner contact.

Bill Enclosure. A special descriptive insert will be enclosed with the monthly electric utility service statement. The enclosure will describe the Project, benefits which may accrue to the homeowner and region, and identify registration methods.

Door Hanger. A brochure designed to attach to any conventional form of external door handle will be prepared. The brochure will invite the homeowner to join the community effort, describe the benefits, and provide registration instructions. If possible, the method of delivery will be by area youth groups.

Specialty Items. Items in this category, including Project posters, clothing, and patches, serve to increase awareness and recognition of the Project.

Manager's Letter. A personal letter from the serving utility manager will be mailed to the homeowner. The letter will personally request the homeowner to join the community effort, provide reference to others who are participating, indicate the available benefits, invite questions and provide registration material.

Door-to-Door. A member of the Project staff will make personal contact with nonparticipating homeowners. The visiting staff member will identify himself/herself and the purpose of the visit, answer questions, and invite participation.

These activities are replicable in nearly any conservation Project and, as such, should provide valuable information concerning the order of effectiveness that might be anticipated if employed elsewhere.

Community Activities

These activities are designed to create a vested interest within the community. Community activities will include both structured and unstructured events. Structured events will occur principally during the initial phases of the Project, and correlate to early advertising components. These events will include:

"Key" Group Presentations. Project management and administrative personnel will make presentations to selected influential community groups. It is anticipated that these activities will stimulate useful discussion within both formal and informal community communication mechanisms.

Community Center. The Community Center will occupy an existing strategically located facility within the study area. The Center will house the administrative staff and serve as the base of operations for all activities. No attention will be focused on the Center during the initial period of organization. An official public opening and open house will be held concurrent with the implementation of activity reporting in the local media. Subsequently, the Community Center will assume a high visibility and serve as a primary locus of Project-focused community events.

Community Committee. The Community Committee is a group of fifteen carefully selected study area residents who will act in an advisory capacity to the Project staff. Each Committee member is closely associated with one or more primary groups within the Hood River Valley. As such, these persons can be expected to serve as essential "windows of communication" to those with whom the Project seeks to interact.

Other unanticipated and unstructured community events will occur throughout the course of the Project. Included in this category of activity will be community programs, participant awards, and similar occurrences which

promote community awareness and communication. These events will be recorded, monitored, and their effects carefully analyzed within the context of the evaluation program.

Feedback Mechanisms

The Promotional Plan is dynamic and flexible. It is driven by structured feedback from both formal and informal sources. The formal feedback mechanisms are described below.

In-Process Assessment. Social Impact Research, Inc., Seattle, Washington has been engaged to conduct systematic third-party monitoring of community responses to Project activities. These data will be carefully reviewed and employed in adjusting Project promotional behavior.

Marketing Response Questionnaire. Each study area resident electing to participate will be asked at the point of the first confirming contact to respond to a Marketing Questionnaire (Attachment "A"). This instrument is designed to identify the source(s) of information, and the reason(s) which motivated participation.

Community Committee. This group of study area leaders will serve as an informal advisory group to Project administrators. The group has been broadly constituted to represent a wide spectrum of interest and influence groups. As such, the Committee will provide an important "window of communication" to the community, and serve as a primary source of feedback regarding promotional effectiveness.

Data derived from each of these formal mechanisms will be carefully and continuously reviewed for their potential value in modulating the effort in such a way that increased response is achieved.

Informal but nevertheless important sources of feedback include Project staff in community groups and organizations and resident electric utility managers and employees.

Implementation Strategy

The implementation strategy employed in the Hood River Conservation Project is intended to obtain the objective of maximum participation, while regulating the rate of citizen commitment to permit timely staff response.

In general, the three promotional components (advertising, recruitment activities, and community activities) will be implemented and articulated in response to formal and informal community feedback, and in direct relationship to the recorded level of reaction to the preceding blend of marketing components. That is, when the recorded level of response falls below the Project staff response capacity, higher level activity will be introduced to supplement earlier marketing and communication efforts. An optimum public response is projected as "Units of Accomplishment" (homes weatherized) in Figure 2.

Bonneville FY (October-September)	Quarter	Units of Accomplishment
1984	1	200
	2	350
	3	800
	4	800
1985	1	300
	2	200
	3	30
Total		2,680

Figure 2. Projected units of accomplishment.

It is not possible to accurately predict which promotional activity or combination of activities will ultimately achieve the Units of Accomplishment projected above. Identification of the process and content required to achieve this optimum response is a primary focus of the Study. Analysis of the resulting data will offer useful insight for those who subsequently promote the conservation resource.

Summary

This Marketing Plan has been presented as a customized plan developed to guide the Hood River Conservation Project, and provides a good illustration of how a plan's structure can be tailored for a conservation program, producing a document which helps attain organizational objectives. This Plan is a working document that analyzes the present environment and provides a detailed plan for future action. Once a plan is complete, it is essential that it be implemented and evaluated.

In the same manner the Promotional Plan is also a customized plan. This Plan is developed to satisfy the promotional goals set forth in the Marketing Plan. With the incorporation of all elements of the promotional mix -- advertising, promotional activities, and community activities -- maximum effectiveness can be obtained.

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