



CCI HEAL

home energy affordability loan

AN EMPLOYER SPONSORED
ENERGY BENEFIT PROGRAM

by



CLINTON CLIMATE INITIATIVE

“The idea behind HEAL is to make workplace retrofits the norm and to create both the demand and the financing for employee residential upgrades.”

President Bill Clinton, [Back to Work](#), 2011

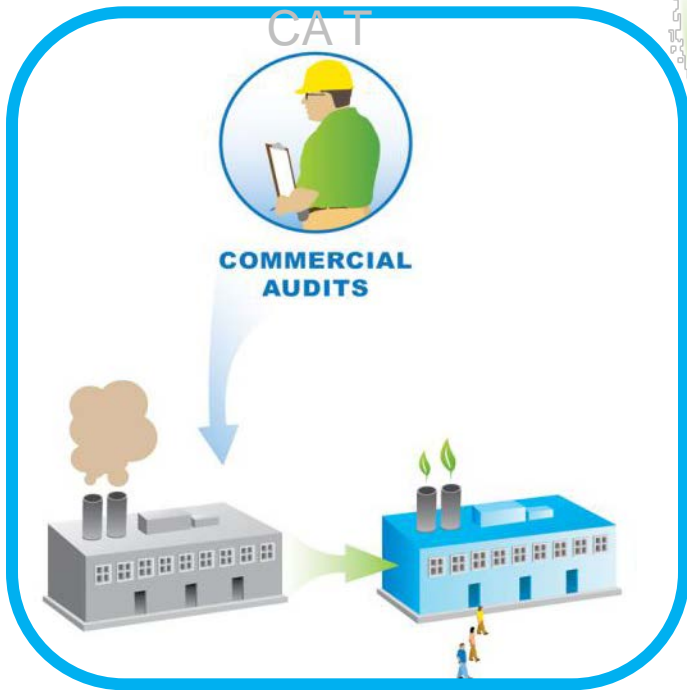


Original Social Network



HEAL Model Design

COMMERCIAL SAVINGS



RETROFIT FINANCE



RESIDENTIAL UPGRADE DELIVERY



Marketing Campaigns



The Modern Sales Funnel:



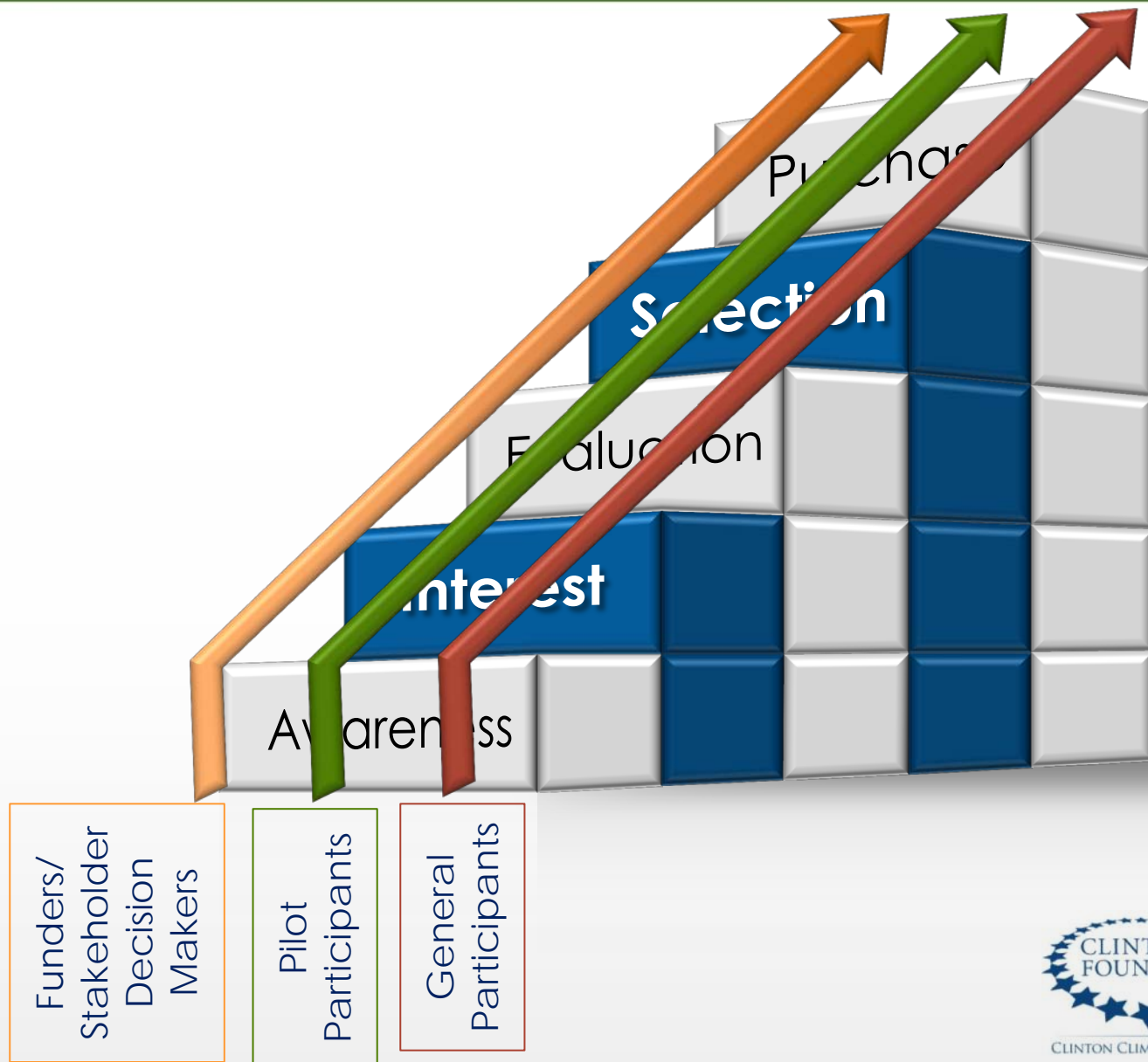
Classic Purchase Funnel



Not as Easy as A Funnel



Not as Easy as A Funnel



Write Your Ending First

Determine upfront what it will take to convince the next round of stakeholders

Four Key Considerations

1. What Data Do You Need, How, Where Do You Get It?
2. Who Needs to Be Convinced and Who Do They Respect?
3. When to Retell Your Story to Connect Delivered Value?
4. Use Earned Media Sparingly- Don't be a PR Junkie



I. Design Your Data Capture

Make a rock solid case
(on paper) before you
begin

- 1) General Population Baseline
 - a) Randomized Sample
 - b) Target Audience
- 2) Participant Baseline
 - a) Initial Perceptions
 - b) Baseline Knowledge
- 3) Participant Post-Service
 - a) Satisfaction
 - b) Knowledge
- 4) General Population Post Service



94% of employees participating in HEAL view employers more positively for offering the HEAL energy benefit program.



Source: HEAL Participant Survey, June 2013



II. Use Organization Specific Stories

Find peers for each constituency that can speak for you



residential CASE STUDY

"Energy efficiency has always been a concern, and it was a godsend that this program came along. I would highly, highly recommend HEAL!"
- Winfred Batch

Winfred Batch Residence
Little Rock, Arkansas

SE Improvement.....	25%
BT Utility Savings.....	57% Annually
BT Savings and Savings.....	1,000 lbs. Annually
BT Savings.....	\$200
Insulation.....	\$204
Door Sealing.....	\$271
Lighting.....	\$111
Appliance Replacement.....	\$641
Total Costs.....	\$2,696
APD Appliance Rebate.....	\$275
EnergyCape.....	\$1,349
Total Incentives.....	\$1,624
Net Cost.....	\$1,072
Simple Payback.....	4.73 Months

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residential CASE STUDY

"UAMS offers various benefits to the employees, but this benefit is just awesome. This benefit is right up there with health insurance!"
- Shirley Stokes

Shirley Stokes

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residential CASE STUDY

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commercial CASE STUDY

HEAL delivered a truly turnkey program that benefits both the facility and our employees!"
- Bob Sherman, General Manager, Arlington Resort

Arlington Resort Hotel and Spa
Hot Springs National Park, Arkansas

Company At A Glance

Building Size.....	300,000 sq. ft.
New Build.....	1904
Estimated Energy Savings.....	\$104,069 Annually
Net Cost/Incentives.....	\$209,424
Implementation Time.....	4 months
Estimated GHG Savings.....	1,240,000 lbs. Annually

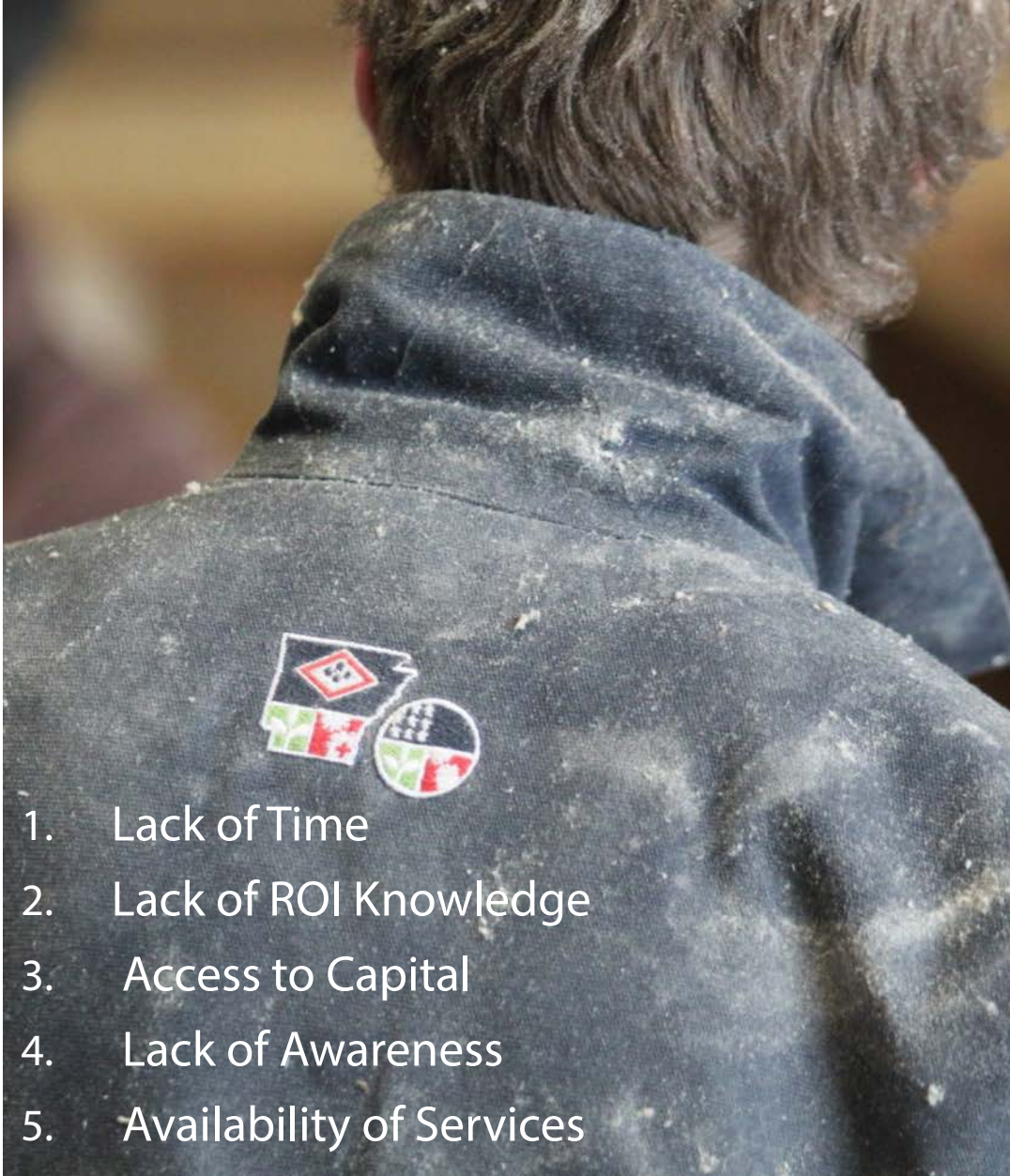
Project Cost:

Lighting.....	\$302,420
HVAC.....	\$57,147
Engineering.....	\$24,400
Developed Audit.....	\$14,840
Construction Implementation.....	\$16,200
Mechanical Insulation.....	\$15,000
Total Cost.....	\$529,807
Incentives/Rebate.....	\$327,960
Net Audit Cost.....	\$209,424
Estimated Energy.....	\$104,069
Simple Payback.....	4.7 years

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III. Retell the Story with Specific Results

“Why don’t they
do it themselves?”

- 
1. Lack of Time
 2. Lack of ROI Knowledge
 3. Access to Capital
 4. Lack of Awareness
 5. Availability of Services

Arkansas Results

Average HEAL client savings over 5 years could provide...



6 months
of Groceries



1.1 years
of Clothing



11.5 months
of Gasoline



19 years
of Flu Shots
(family of 4)

Annual Cost Sources: BLS, Consumer Expenditures, 2009-11; CCAA, Parents and the High Cost of Child Care: 2012 Report

Return On Investment



ROI for employees undertaking home energy improvements



Number of years in the last 35 that the stock market has exceeded that return



Number of years in that time period the stock market has had a negative return

Source: HEAL Participant Data, 2012



90% of participating employees are likely, or very likely, to make energy efficient improvements in the future...



64% would not have made improvements without HEAL participation

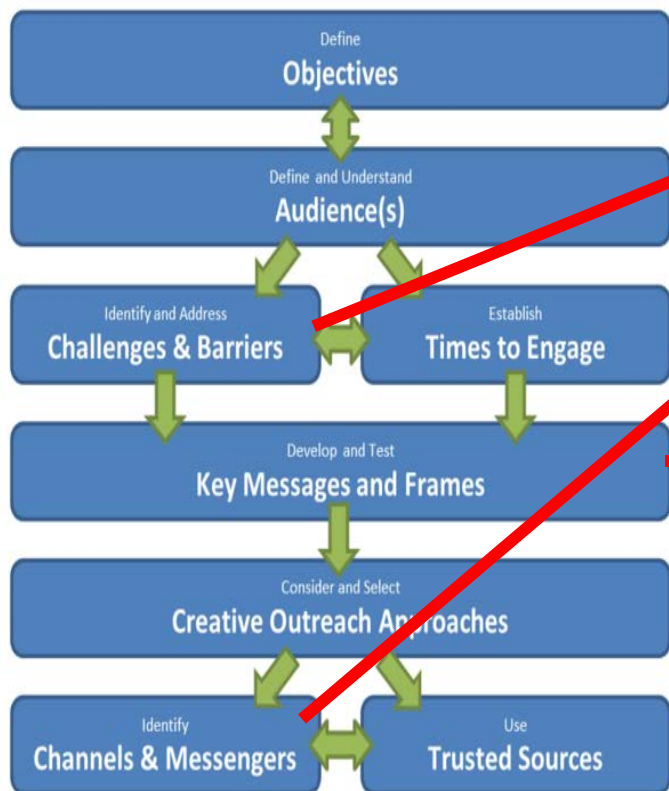
Source: HEAL Participant Survey, June 2013

IV. Plan to use Targeted Earned Media

Don't confuse eyeballs with
influence- uniqueness has a
shelf life



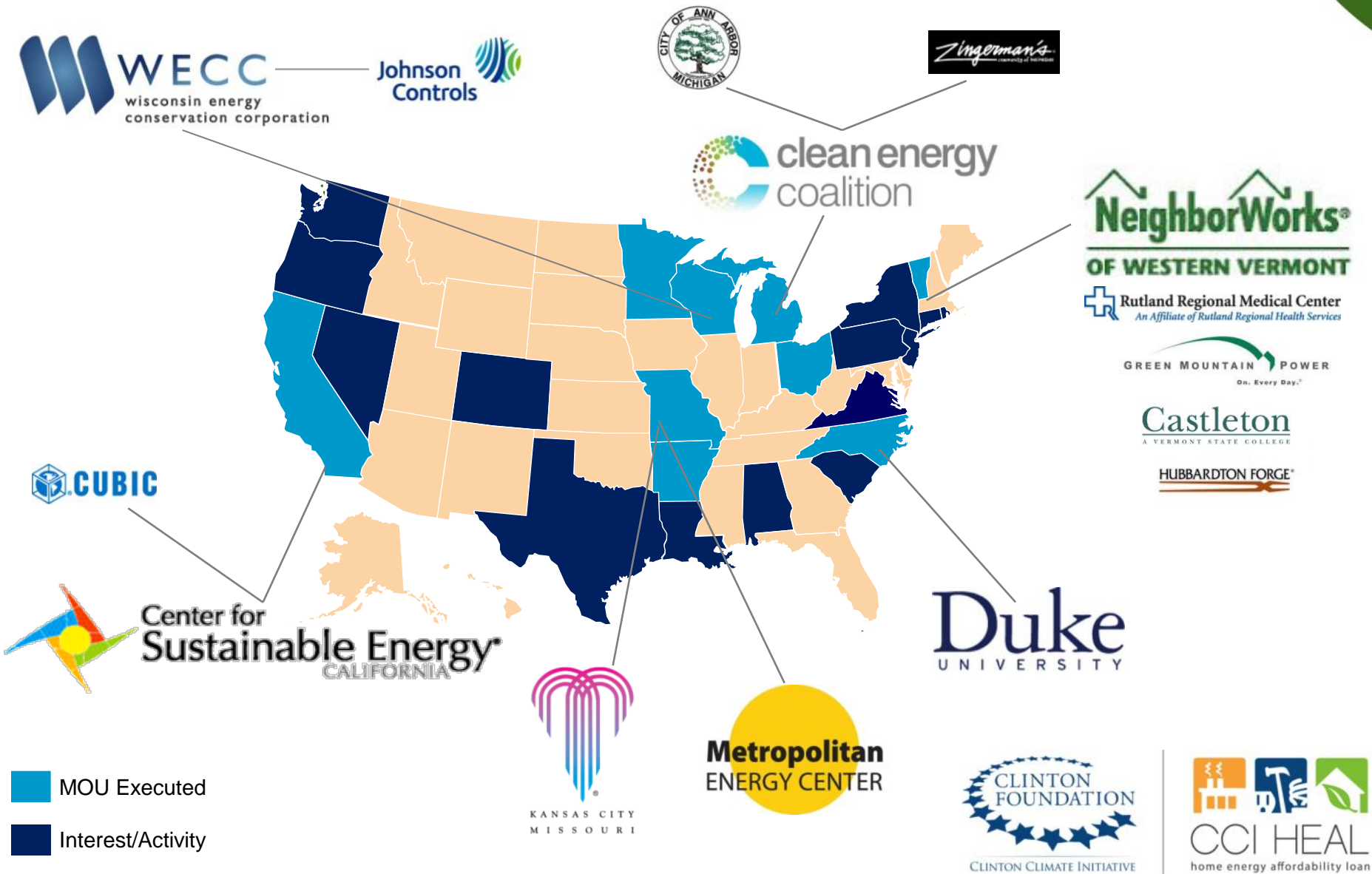
Communications Framework



Four Key Considerations

1. What Data Do You Need, How, Where Do You Get It?
2. Who Needs to Be Convinced and Who Do They Respect?
3. Retell Your Story to Connect Delivered Value
4. Use Earned Media Sparingly-Only When It Helps You Sell the Program

HEAL Replication Partners with Programs Underway





**KEEP
CALM
AND
REPLICATE**



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