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Publicity & Marketing Strategy

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Section 1. Overview

The vision behind Community Energy and TECs in particular is to " **achieve the widest possible community engagement** " with Energy, how it is used, generated and it's contribution to Climate Change.

This strategy sets out how we plan to do this for both Site/Stakeholder Selection and Share Offers as managed by TECs. It also provides some suggestions on engagement techniques for the different stages.

An essential pillar of this approach is to link TECs' strategy on engaging the community to invest (sites & shares) with users' long-term engagement on their energy use. The latter is the responsibility of stakeholder groups/organisations and supported by TECs through grants and advice/support when requested.

While the focus for TECs will be to manage the legal and financial elements of Community Energy, we also want to ensure that the overall vision of this initiative is achieved.

Section 2. Site and Stakeholder Selection

Renewable Energy is only one part of what is needed to address Climate Change caused by carbon emissions. The more effective, but more challenging part, is our use of Energy and how careful we are in not wasting it. While a site may be ideal for a particular Renewable technology, the engagement of the user community and those making decisions on Energy and Carbon usage at that site are equally, if not more, important.

TECs has therefore developed a set of criteria to identify the suitability of a potential site and its users. This will take the form of questions to be answered by the stakeholder organisation, usually the owner/occupier, putting a site forward for consideration. It is important that such criteria are applied fairly and openly and have a clear purpose which achieves both financial viability and meets the overall TECs vision.

In 2015/16 a number of sites were selected to develop the process from stakeholder selection, share offer, installation, user engagement to operation. These pilots became early indicators of capability and therefore acceptance by other stakeholders. This made the selection and success of any initial site critical for the longer-term success of TECs. Avoiding high risk and/or controversial sites became an important driver, and remains so today.

The stakeholders supporting TECs early on during the pilot stage was also a critical factor. This was particularly relevant for persuading new stakeholders as TECs is effectively competing with commercial organisations who are likely to have more immediate access to investor funding. Organisations such as councils, academic providers, social housing providers, churches and health/care sector represent the longer-term community drivers more strongly than the narrow financial benefit resulting from installing certain Renewable technologies.

Longer term, the most powerful publicity and marketing approach will be the success of, and continued support from, TECs' key stakeholders.

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Section 3. Share Offers

Once a stakeholder site/project has been agreed, we will focus the engagement effort to raise funds from that organisation. Investors will initially be sought direct from users of the site and 'associates', as well as existing TECs members who may be individuals or organisations. The stakeholder site provides a ready-made and discrete audience with the interest of the organisation in common, allowing our engagement to be targeted.

The use of existing 'champions' from within the stakeholder organisations and their established communications networks will be important, not only for publicising the share offer, but also longer term for engagement and awareness of Energy use. In effect making the transfer from financing/installing to ongoing Energy Awareness a seamless process in which responsibility is transferred from TEC's to the stakeholder.

First preference for the share offer will be given to the users of the site and others associated with the site and/or TECs members. Either a lower investment minimum will be set or they are given a pre-public launch window to apply. Match Funding minimum investments to encourage younger and those less able to afford buying shares may also be considered.

Where a share offer is launched to cover more than one site/stakeholder or for larger installations where the user community may be small, this may require collaborating with other nearby organisations or even the use of external share offer platforms to attract investors from a larger pool. Some form of 'preference' for the local community should still be incorporate, as ownership is an important driver for ongoing support which goes beyond the monetary investment.

TECs' aim is to have a broad cross-section of Members from within Teignbridge. Ideally we would like to have Members invest £1,000 or less, but recognise that some projects will require investors with a higher individual investment.

We will include low entry (from £1 to £49) 'rolling' investment mechanisms in order to maximise the number of Members willing to make an effort to be part of the TECs initiative. This will be provided on a long-term basis as it relies on existing personal networks to get the 'message' out.

3.1 Market Segmentation

The diagram in Appendix A reflects how we have grouped the different investors to achieve our stated aims and approach. This segmentation allows us to prioritise the share offer using two possible mechanisms:

- minimum investment level > nominally set at £50-100 for segment A ; £250 for segment B ; £1,000 for segment C
- phased availability > nominally allowing 1 week delay for sectors B & 2 weeks for sector C after the share offer has been launched for sector A.

Each share offer will identify the specific Stakeholder(s)/Project(s) and set appropriate priorities for each of the segments based on the nominal values suggested here. In effect we will have discrete share offers. To incorporate an element of a rolling share investment, we will use the short term loan investment which underwrites a share offer. We may also allow membership donations to be converted into shares, this is under consideration.

Consideration must be given to achieving a reasonable balance between our aim to include as many investors as possible (by offering a low entry threshold) and the effort/cost associated with a large number of smaller investors.

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Section 4. Publicity/Engagement Techniques

There are a number of external processes/relationships which will require different publicity/engagement techniques, although there will be significant overlap. Please refer to the process chart in Appendix B.

4.1 Initial Stakeholder Engagement

- Identify Ambassadors within TECs with a broad overview of the initiative and able to build a relationship with potential Stakeholder organisations. In the short term, these Ambassadors will make the initial approach.
- Personal approaches by TECs Ambassadors will be the main initial route to new projects.
- Longer term we will also rely on networks and contacts within the Stakeholder organisations to become Ambassadors. As the publicity spreads and TECs installations are up and running successfully, the approaches will come from interested parties to TECs.

4.2 Stakeholder/Project Assessment

- TECs to work collaboratively with the stakeholder on responding to the Assessment Criteria.
- Important to have early engagement with the stakeholders and their community to embed the TECs vision at early stage. This differentiates TECs from commercial companies and helps address concerns at an early stage.
- Gauging opinion via initial surveys and on-site presence will be key to inclusion of as many users as possible at this stage.
- Use existing forums and networks within the Stakeholder organisation.
- Stakeholder to identify energy champions from within the organisation to raise awareness and deliver on-going engagement.
- Work with the Energy Champion(s) to establish an appropriate engagement strategy.

4.3 Share Offer

There are likely to be two stages to raise funds for a stakeholder's projects(s). Initially TECs will issue a one year bond (private loan) from its existing contacts/supporters/membership. The terms for these are likely to be similar to the subsequent long-term community share offer an include an option to convert all/some of these bonds to shares.

Sufficient shares are allocated to cover the initial costs of a project plus adequate contingency. The amount must be financially viable based on the Financial Modelling undertaken. This includes being consistent with an equitable sharing of risk/benefit between; Stakeholder, members and the Community Fund.

We will make full use of preferential share offer to target the users in sector A (see appendix A) for longer term engagement.

The approaches used will include the following. It will be necessary to define which of these and their extent will be used for each Share Offer launch in order to achieve the right balance between raising the necessary funds and the level of effort/cost.

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- Personal contact, this may be one-to-one or small groups of family, friends, work colleagues and acquaintances.
- Existing channels within Stakeholder organisations.
- TECs newsletter, website & social media
- Public, on-line & traditional media
- Specific events organised by TECs
- Share offer platforms

4.4 Supporting Related Community Initiatives

- Set criteria for supporting such initiatives.
- Give preference to Stakeholder organisations whose projects will be generating the fund.
- Develop material which reflect best practice from other organisations engaged in delivering such projects.
- Monitor progress against agreed criteria/timetable.
- Foster co-operation with other CE groups and consider sharing effort/resources/costs.

4.5 General

- Use/develop existing characters, e.g. Dr Watt and team. Dr Watt helpline, video, Q&A sessions. A Dr Watt could be trained in every organisation.
- Offer Energy advice to members and other organisations.
- Use/develop a corporate identity for TECs.

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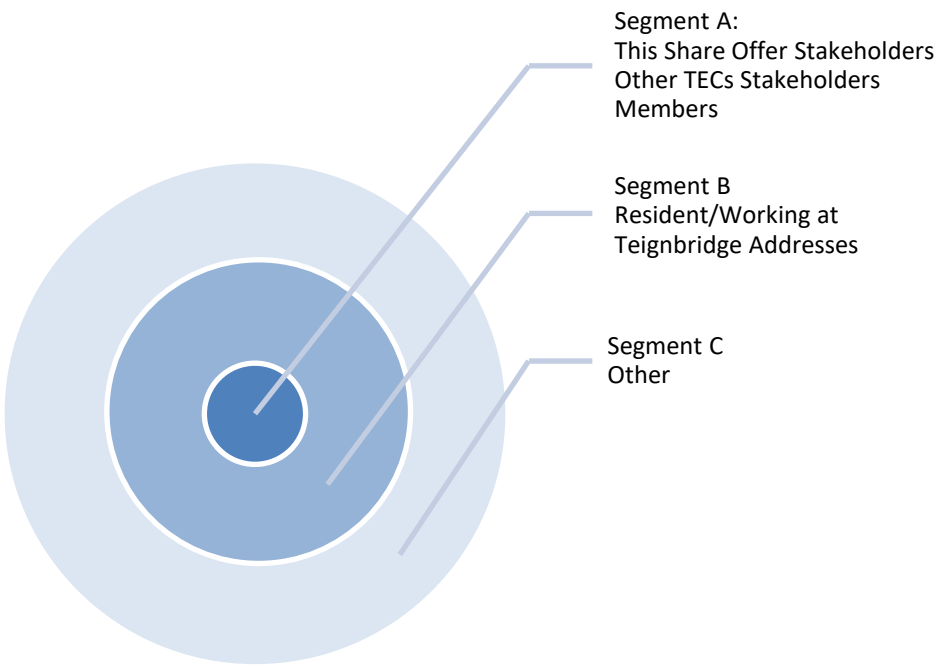
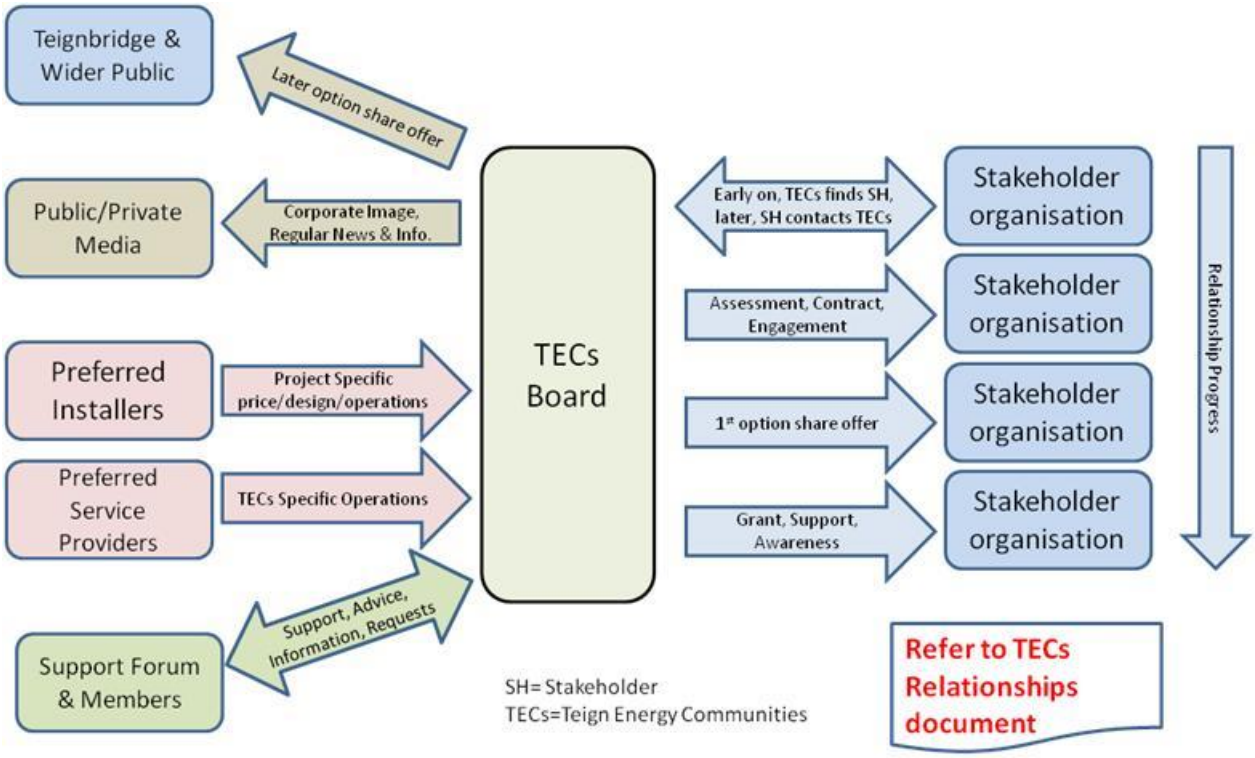
Section 5. Appendix A - Investor Market Segmentation



Section 6. Appendix B - Process & Relationship Diagram



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