

Experience Clean Heat

Program Manual

September 2024



NYS Clean Heat
Supported

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Background

Experience Clean Heat is an initiative sponsored by the New York State Energy Research and Development Authority (NYSERDA) to provide New Yorkers opportunities to interact with and learn about heat pump technology used for space heating and cooling. This includes cold-climate air source heat pumps and ground source heat pumps (geothermal). It will leverage existing heat pumps installed in community spaces (e.g., libraries, municipal buildings, etc.) and consumer-facing businesses (e.g., salons/barber shops, restaurants, etc.) to implement a range of attention-grabbing promotional tactics outlined throughout this manual. NYSERDA, via its implementation contractor TRC, a leading global consulting, engineering, program, and construction management firm, will partner with Experience Clean Heat sites to bring attention to their heat pump installations with various ongoing and one-time promotional tactics. Each Experience Clean Heat site will have a customized overall promotional strategy supported by NYSERDA to create opportunities for consumers to directly encounter working, living, and going about day-to-day business in buildings heated and cooled with heat pumps, encouraging them to spread the word about their experiences. The initiative will raise awareness, overcome misinformation, garner confidence, and cultivate enthusiasm for heat pumps as a low-carbon solution for whole building heating and cooling needs.

Roles and Responsibilities

Participant (Experience Clean Heat Site)

Expectations

To ensure Experience Clean Heat is successful, the participant agrees to:

- Allow periodic site visits by NYSERDA staff and/or their contractors to assess heat pump functionality and material related to Experience Clean Heat.
- Allow signage and a good faith effort to keep signage visible and clean.
- Allow site information, including name, address, contact information, and event or promotional materials, as well as site images to be posted on a public website and in event notices.
- Make a good faith effort to participate in promotional campaigns, including social media promotions.
- Make staff available for initial training.
- Make a good faith effort to have staff promote signage, heat pump(s), and promotional tactics.

- Make staff available for evaluation interviews/questionnaires.
- Follow guidelines outlined in this manual and any additional guidelines provided for marketing, contests, social media interactions, and overall program participation.

Benefits

By participating in Experience Clean Heat, the participant can promote the site as green or sustainable and may receive:

- Social media toolkit, including pre-written posts and content development support.
- A joint campaign collaboration with NYSERDA, including boosted NYSERDA social media postings featuring and tagging the Experience Clean Heat site.
- Custom photography or video clips of the site.
- Heat pump technical support and operations and maintenance tips.
- A listing on cleanheat.ny.gov, including site name, address, and type of business/building.
- Campaign pushes directing visitors to site.
- Individual pop-up events at site.

NYSERDA

NYSERDA, via its implementation contractor TRC and their field ambassadors, is responsible for the following activities:

- Provide inspections of the heat pump(s).*
- Provide training and information on heat pump operations.
- Provide and hang signage and other promotional tactic collateral.
- As applicable, attend and facilitate events and campaigns.

*NYSERDA and TRC are not responsible for any maintenance or repair costs associated with the heat pump(s).

Promotional Tactics

Experience Clean Heat will work with sites to increase consumer awareness of the benefits of heat pumps through a range of promotional tactics. Promotional tactics will vary based on site needs and opportunities.

NYSERDA-Led Social Media Advertising

NYSERDA will provide paid social media advertising and content support such as:

- Featuring Experience Clean Heat sites in paid social media advertising campaigns in the zip codes or counties that the site serves.
- Custom photography or video clips of sites, created by NYSERDA's advertising agency.
- Coordinated promotion of posts to further the awareness of sites.
- Event posts for Experience Clean Heat promotional events such as a pop-up event, giveaways, or coupons.

Site Listed on cleanheat.ny.gov

[Cleanheat.ny.gov](https://cleanheat.ny.gov) is the website for New York State's cold climate heat pump consumer marketing campaign that averages over 60,000 visitors a month. Sites will be listed in two areas of the website:

- On a dedicated page of Experience Clean Heat locations.
- On a results list for consumers who enter their zip code and are looking for regional resources or rebates.

Digital Marketing

In addition to social media, NYSERDA may use other advertising channels (i.e., digital banners, emails, SMS text messages, and digital billboard screens), to promote sites as a place consumers can experience heat pumps.

Signage and Custom Support

To create positive experiences for site visitors, NYSERDA will work with each site to understand its current visitor experience. Experience Clean Heat will provide signage and interactive components visitors can access via smartphone use. Sites may receive:

- Custom onsite signage.
- Pamphlets and takeaways.

- Coupons (digital or paper) for promotions related to Experience Clean Heat.
- QR Codes that lead to an interactive experience related to heat pumps.

The development and/or printing of these materials will be funded entirely by NYSERDA.

Raffles, Giveaways, Sponsored Events

NYSERDA may offer a raffle, giveaway, or other sponsored event customized to fit with the site's current marketing promotions and characteristics. NYSERDA can cover these costs, up to \$2,500 per site. Sites will opt-in separately for the events. Separate participation details, rules, and restrictions will apply and may be added to the program manual as Experience Clean Heat develops customized promotional tactics.

Social Media Toolkit

In addition to NYSERDA covering all social media campaign costs, the organization that owns the site will receive a free social media toolkit and best practices guide to help promote the business and/or site. This will help participants make the most out of social media advertising in conjunction with their Experience Clean Heat participation.

Social Media Strategy and Support

Social media toolkits may include but may not be limited to the following:

- Images and videos for posts.
- Recommended post copy specific to business or building type.
- Recommendations for engaging followers, including timing and frequency of posts.
- Ideas for promotions to help drive traffic to the site, including contests.
- Technical support for social media issues: contact: social@ksvagency.com (NYSERDA communications contractor).

How to Use Them

- Toolkits will provide instructions that the participant must follow for social media posts.
- When developing personal custom posts about Experience Clean Heat, the participant must follow program guidance for content and language.
- The participant may not use NYSERDA or NYS Clean Heat logo and formatting without NYSERDA's review of designs.

Social Media Best Practices

Best practice for negative comments about heat pumps or this initiative is to not engage, whether on social media or in-person. Inappropriate terminology or wording can lead to more negative feedback, not just for heat pumps but also for the site responding to the comments.

Process



Figure 1: Process Overview

Site Enrollment

A consumer-facing site that is interested in joining Experience Clean Heat may have the site owner or another authorized representative, such as a site director, apply to enroll in the Initiative by filling out the application on the Experience Clean Heat website, or expressing interest either via email, phone, or an in-person conversation. TRC will assign a field ambassador to each potential site to serve as the site's main point of contact. The field ambassador will send a Participation Agreement and questionnaire to the site's owner or authorized representative and coordinate an in-person site visit. The site's owner or authorized representative should complete the Participation Agreement and questionnaire prior to a site visit. The site visit is to confirm its suitability for Experience Clean Heat. During the site visit the field ambassador will assess the heat pump's appearance and operation, the site's use of other heating systems, and other site features such as location, appearance, viability for signage, viability for events, use of social media, etc. Not all sites are a good fit for Experience Clean Heat. After the site visit, the field ambassador will communicate the final status to the owners/managers of the site.

Sites are evaluated for suitability for Experience Clean Heat based on two categories: technical and business. A site must have a minimum of 50% of the total available points in each of the two categories. The intent of the categories is to ensure that the sites meet the Experience Clean Heat campaign goals.

Technical

Experience Clean Heat is seeking exemplary examples of heat pump installations that highlight usage in all weather conditions. Sites are automatically ineligible if the installed heat pump is not on the Northeast Energy Efficiency Partnerships cold climate list or does not meet similar levels of technical requirements. Sites are scored on a scale based on the following evaluation criteria:

- Are the heat pumps installed and sized correctly for the space?
- Are the heat pumps the sole heating and cooling source? If not, does the site have system controls that prioritize heat pump use over other HVAC systems?

- Are the heat pumps designed, installed, and operated in such a way as to provide a comfortable atmosphere in both heating and cooling seasons?

Business

Experience Clean Heat is seeking businesses that are open to the public and would be able to participate in Experience Clean Heat promotional tactics. Sites are scored on a scale based on the following evaluation criteria:

- Is the business open to the general public?
- Does the business promote sustainability?
- Does the business host events?
- Does the business have an active social media presence?

Once enrolled, NYSERDA will print the signage selected by the site and work with the site to develop customized signage and promotional material.

Signage and Social Media Toolkit Delivery

The field ambassador will deliver the site's signage, promotional material, and social media toolkit prior to or on the same day as the scheduled staff training. The field ambassador will work with the site staff to properly hang signage and ensure it meets all expectations of the site and Experience Clean Heat. The field ambassador will provide the social media toolkit via email and will coordinate with NYSERDA and KSV to support additional social media interaction training as requested.

Staff Training

The field ambassador will schedule a brief training course for site staff. Training will take 30-60 minutes and topics include:

- An overview of Experience Clean Heat.
- Basic heat pump operations and maintenance.
- Information on how to advocate for heat pumps.
- Information on how to counteract myths about heat pumps, such as that heat pumps don't work in upstate New York winters, heat pumps will crash the electric grid, or they blow cold air.

The field ambassador will also provide sites with a reference binder that includes the content from the staff training session and any specific information pertaining to that site, such as custom campaign information and specific heat pump maintenance suggestions.

Ongoing

The field ambassador and NYSERDA will be responsible for assisting the site with ongoing activities associated with Experience Clean Heat. The field ambassador will meet onsite at least once per quarter to change signage or confirm what is in place. NYSERDA and the field ambassador will coordinate additional promotional tactics such as:

- Pop-up events
- Raffles
- Site promotional activities (coupons, gamification, giveaways)
- Engagement/participation with broader New York State Clean Heat marketing campaigns, including social media

The field ambassador will continue to be in touch with the participant throughout the entire term of Experience Clean Heat, especially if any promotional tactics (i.e., raffles, contest, pop-up events) are occurring at the site or in the area that may include the site. The site's organization may participate in multiple promotional tactics as those strategies become available.

Term

Experience Clean Heat will end on October 31, 2025, unless NYSERDA extends or terminates the program before that date.



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