



## Staff Report Item 12

**TO:** East Bay Community Energy Executive Committee

**FROM:** Annie Henderson, VP of Marketing and Account Services

**SUBJECT:** EBCE Co-Branding and Collaboration Policy (Action Item)

**DATE:** September 26, 2018

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### **Recommendation**

Review and approve a policy on EBCE co-branded marketing materials

### **Background**

The Joint Powers Agreement that created EBCE lists the following purposes in the recitals:

- Addressing climate change by reducing energy related greenhouse gas emissions
- Fostering local economic benefits such as jobs creation, community energy programs, and local power development
- Promote the development and use of a wide range of renewable energy sources and energy efficiency programs

Many local organizations and industry groups have goals that align with the stated purposes of EBCE and have expressed interest in creating co-branded marketing materials and/or collaborating on customer outreach.

### **Discussion**

We realize that not every co-branding opportunity or potential collaboration will be conducive to the goals of EBCE. Therefore, staff has attached a policy on co-branded marketing and collaboration for the Board's review and approval. The purpose of the policy is to provide staff general guidelines in making the initial assessment of co-branding or collaboration opportunities prior to bringing items to the board or executive committee for final approval.

**Fiscal Impact**

Future co-branding or collaboration opportunities could have a fiscal impact. This is addressed in the policy and is subject to board approval.

**Attachment**

- A. EBCE Co-Branding and Collaboration Policy

## Co-Branding and Collaboration Policy

### Purpose:

It is in the interest of East Bay Community Energy (“EBCE”) to establish administrative policy on co-branding with the EBCE brand in order to provide staff general guidelines in making the initial assessment of co-branding and collaboration opportunities and outline a process for review and approval by the Board of Directors.

### Policy:

1. EBCE Co-Branding or Collaboration Partners
  - a. EBCE may co-brand or collaborate in outreach activities with entities that fit into the following categories:
    - i. Parties to the Joint Powers Agreement
    - ii. CalCCA, the Community Choice Aggregators (CCA) industry group
    - iii. Non-profits that meet the following requirements, as applicable
      1. Significant member base within EBCE service territory,
      2. Location within EBCE service territory, and
      3. Stated goals which align with the purposes of EBCE including:
        - a. Address climate change by reducing energy related greenhouse gas emissions,
        - b. Foster local economic benefits such as jobs creation, community energy programs, and local power development, and
        - c. Promote the development and use of a wide range of renewable energy sources and energy efficiency programs.
  - b. EBCE may elect not to co-brand or collaborate in instances including but not limited to:
    - i. Multiple requests for co-branding or collaboration at the same event or same media outlet,
    - ii. Requests from organizations that have taken an adverse position on EBCE activities, CCA-supporting legislation, or regulatory decisions, even if the organization’s general goals align with EBCE, and
    - iii. Request requires EBCE staff resources beyond what is feasible given other operational priorities and/or the level of effort would overly tax EBCE’s resources.
2. Co-Branding Assets
  - a. The following may be used in co-branding
    - i. EBCE and product logos
    - ii. EBCE content and photo stock
  - b. Co-branded materials may include but are not limited to flyers, brochures, and inserts.

3. Review and Development Process
  - a. EBCE Staff will review requests for co-branding and collaboration and assess qualifications of the potential partner.
  - b. If partner meets requirements, EBCE staff will work with the partner to develop a draft of the co-branded collateral based on EBCE brand guidelines or outreach collaboration plan.
  
4. Approval Process
  - a. Co-branded collateral or a collaboration plan along with any associated costs will be presented to the Board or Executive Committee for approval of the co-branding or outreach collaboration partnership.