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Agenda

- 1 Recommendations
- 2 Findings 1-6
- 3 Conclusion
- 4 Q&A

Summary of Recommendations

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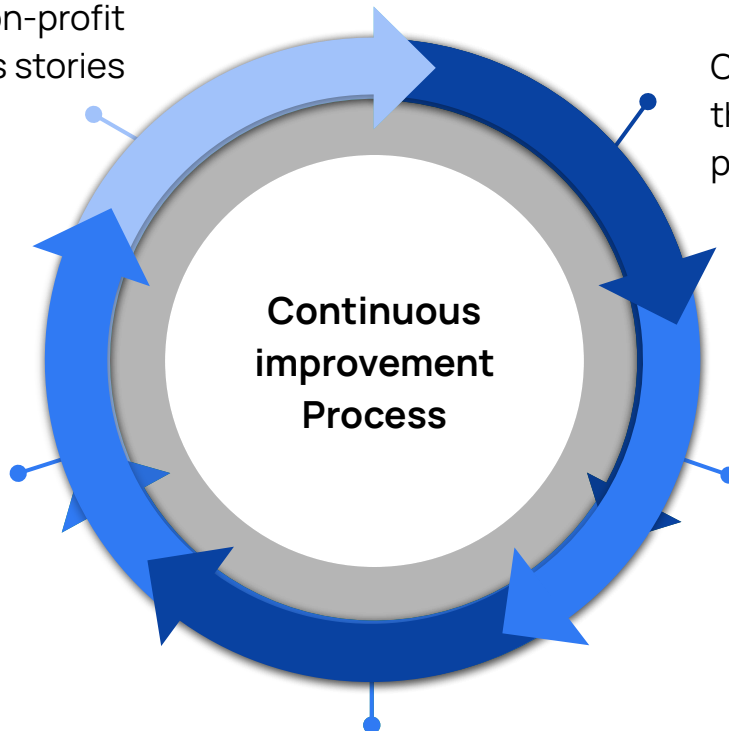
Outline **clear guidelines** for non-profit partners on the creation of success stories

Create a **clear vision of success** throughout Intuit and with non-profit partners

Align success stories within a **storytelling framework**

Integrate success stories as a core component of program design

Communicate a **clear vision for stakeholder engagement**



Finding #1

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\$1,000 is a significant enough scale to create success stories

Through the California Pilot program, Intuit proved that \$1,000 was enough to generate success stories. At the end of the program, California Green Business Network posted success stories on their website highlighting their partnership with Intuit.



Recommendation #1

Example guidelines

Outline clear guidelines for non-profit partners on the creation of success stories

Expected number of success stories

Format of success story

Content creation Guidelines

- **Quantity and Medium**
 - Partners create success stories on a period of time (exp: monthly) and post it on public media
- **Content to included**
 - What was funded and how it helped (e.g., energy upgrades, cost savings).
 - Measurable outcomes (e.g., "Saved 30% on energy costs").
 - A quote from the business owner
- **Social Media Branding Guide**
 - Have specific guideline for each social media (Twitter, Facebook, LinkedIn, Instagram)

Finding #2



Are the
success
stories
compelling?

It is unclear whether success stories were successful in form, engagement or impact:

- The target audience of success stories, and how they connected to Intuits overarching goals is unclear
- The stories highlighted project impacts, but there was no unified message
- Success Stories were used on a limited basis for engagement beyond being posted on the CABGN website

Recommendation #2

Create a storytelling framework that success stories are aligned to.

To ensure success stories are interconnected, consistent across states, and compelling, we recommend clearly communicating the theme, style, and engagement pathways to all partners.



Finding #3



is there a
vision for a
broad
engagement
strategy?

It is unclear whether a strategic vision of how this program achieves broad engagement has been fully developed.

- Internal stakeholders have not fully been briefed on the program
- There is not full clarity on how projects and their success stories are conceptualized to lead to effective engagement
- There is no vision document to guide how this program fits within Intuits other stakeholder engagement efforts

Recommendation #3

Communicate a clear strategic vision for stakeholder engagement

Conduct a stakeholder engagement process to assess stakeholder understanding of program and alignment with other initiatives

Create and refine a vision statement based on stakeholder feedback

Communicate the vision to both internal and external stakeholders

Determine the role of external partnerships in delivering success stories

Resource: Climate Landscape Analysis



Illinois

Signed Policy

Climate and Equitable Jobs Act (CEJA) – Targets 100% clean energy by 2050 and prioritizes equitable workforce development. Aligns with Intuit's goals to support green initiatives for SMBs.

Proposed Policy

Climate Corporate Accountability Act (HB4268) – Requires large businesses to disclose GHG emissions (Scopes 1, 2, and 3), potentially impacting SMBs in the supply chain.



Nevada

Signed Policy

Priority Climate Action Plan (PCAP) – Targets 28% emissions reduction by 2025, 45% by 2030, and zero or near-zero emissions by 2050. Focuses on renewable energy (50% by 2030).

Proposed Policy

None identified at this stage.



California

Signed Policy

Climate Corporate Data Accountability Act (SB 253) – Requires GHG emissions reporting for companies with revenue over \$1 billion.
SB 100 – Calls for 100% carbon-free energy by 2045.
AB 32, SB 32, AB 1279 – Mandates reductions in GHG emissions, with a carbon neutrality target by 2045.

Proposed Policy

None identified at this stage.

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Relevant Organizations for Illinois



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Organization	Key Focus Areas	Recommendations	Room for Opportunities
Illinois Environmental Council (IEC)	Policy advocacy, coalition-building	Partner for local stakeholder engagement and policy advocacy	Leverage their network to amplify SMB initiatives.
Citizens Utility Board (CUB)	Energy efficiency, fair utility rates	Collaborate on energy-saving programs	Co-develop SMB-focused utility education campaigns
Illinois Clean Jobs Coalition	Renewable energy, energy efficiency	Align with legislative goals for renewable energy.	Co-sponsor workshops to connect with SMBs.
Illinois Finance Authority	Financial assistance, solar energy	Work together to incorporate Solar for All grants into Intuit's incentive structure	Use their financial mechanisms to offer layered incentives for small businesses
Illinois Chamber of Commerce	Economic policy, business advocacy	Engage for business-oriented policy recommendations.	Partner to reach small businesses interested in sustainability and policy engagement.

Relevant Organizations for Nevada



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Organization	Key Focus Areas	Recommendations	Room for Opportunities
Nevada Clean Energy Fund (NCEF)	Clean energy growth, financial/technical support	Collaborate on offering technical assistance and funding for SMBs adopting green practices.	Expand outreach to marginalized communities using NCEF's existing programs
Nevada Conservation League	Conservation policies, legislative advocacy	Leverage their grassroots advocacy for broader legislative support.	Join their public education campaigns to enhance visibility of Intuit's climate initiatives
Clean Energy Project Nevada	Renewable energy advocacy, education	Co-develop educational materials on the benefits of energy efficiency for SMBs.	Use their network to connect with policymakers and develop a collaborative grant program
Western Resource Advocates	Climate and energy, water use	Integrate their research findings into Intuit's recommendations for sustainable practices.	Advocate jointly for water-energy nexus policies that benefit SMBs
Sierra Club, Toiyabe Chapter	Environmental protection, conservation	Partner for community-focused conservation and renewable energy projects.	Showcase Intuit's impact at their community events.

Finding #4



Did the success stories enable engagement with policymakers in a coordinated manner?

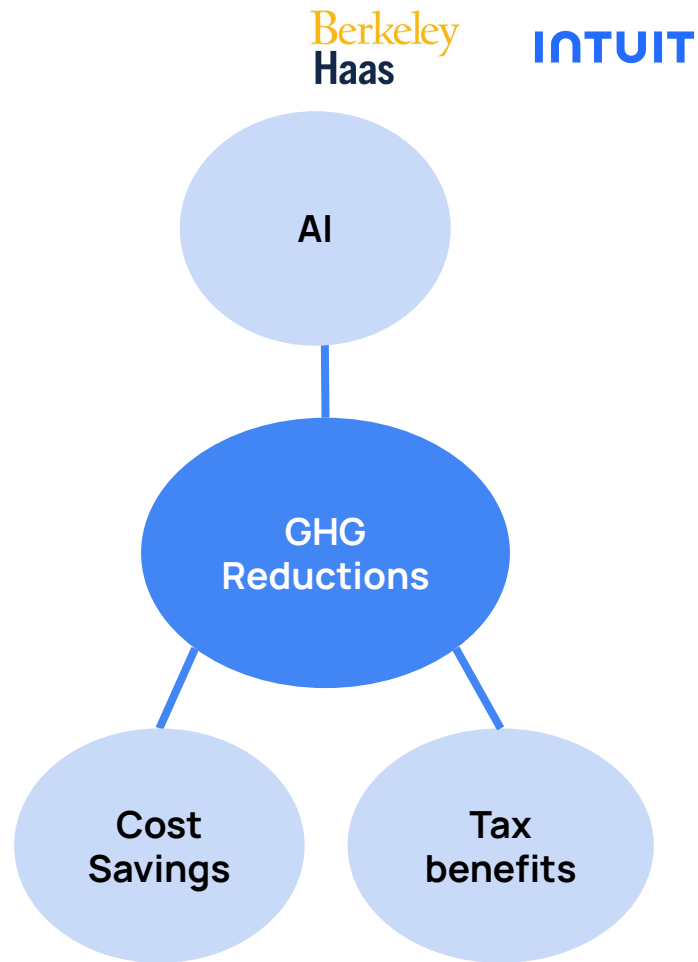
Success stories have not been consistently leveraged to engage with policymakers.

- Program implementation is not integrated with success stories creation and utilization
- Success stories are slated to be created in bulk at the end of the project, instead of at regular intervals
- There has been no clustering of project in order to enable targeted engagement of specific policymakers

Recommendation #4

Integrate success stories as a core component of program design

- Center the creation of success stories as a key goal of implementing energy efficiency projects
- Identify 5-10 key policymakers to build relationships with. Map out their other areas of interest or political leverage.
- Design program to cluster projects and success stories around key policymakers
- Design engagement using a hub and spoke model.



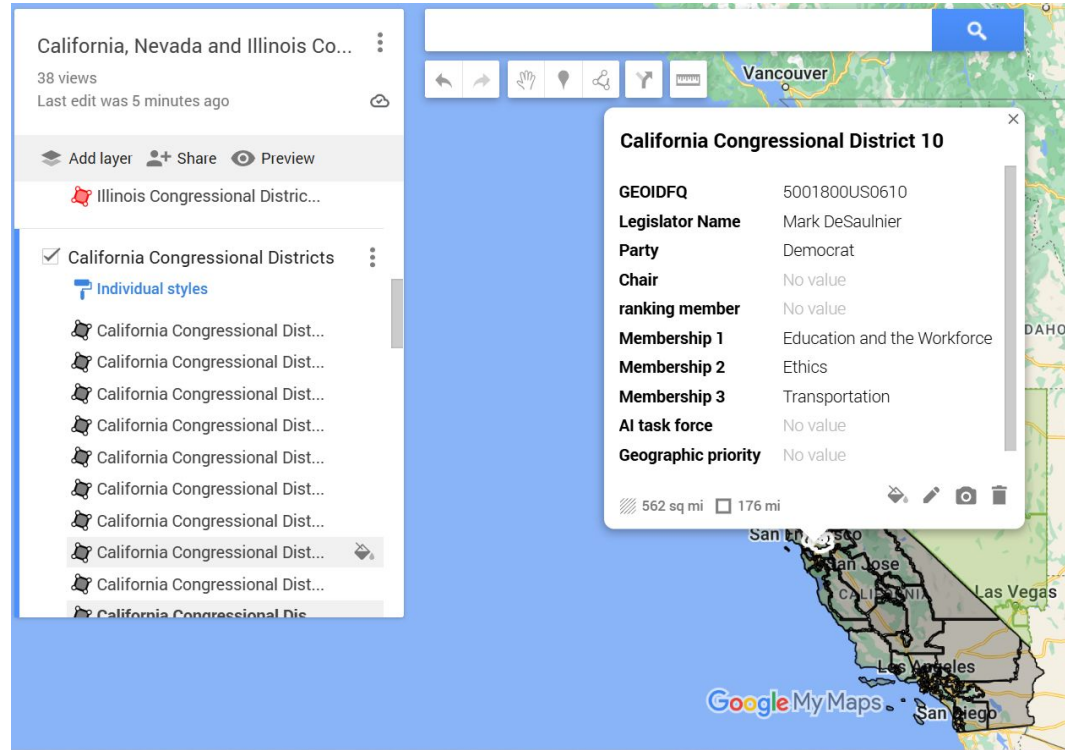
Resource: GIS Mapping

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Mapping data available online through google my maps:

- database of congressional districts, federal lawmakers, and the committees the sit on
- This tool can be used to identify clustering opportunities



Findings 5 and 6

Are policymakers are responsive to engagement?



This is will remain unknown until Success Stories are used to engage with policymakers

Does Engagement leads to better policy outcomes?



This is unclear without implementing recommendation #5

Recommendation #5

Create a clear vision of success

- What are the policy objectives of this program?
- In which institutional forum will these policies be decided?
- Who are potential allies and how will Intuit mobilize them?
- How public or visible does intuit want their advocacy to be?
- What arguments need to be made to convince policymakers?
- How do elections impact the ability to achieve policy objectives?

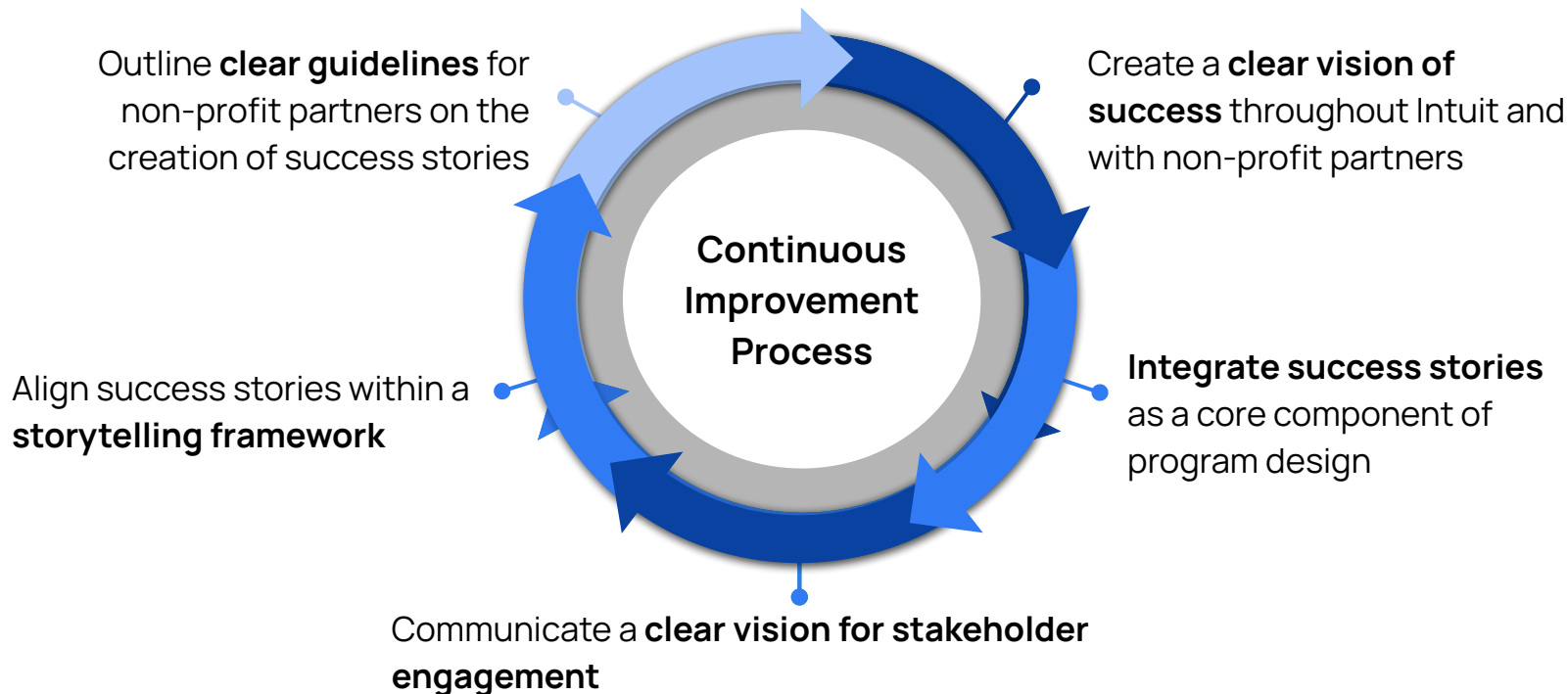
How does the deployment of success stories as part of comprehensive engagement strategy lead to the achievement of policy objectives

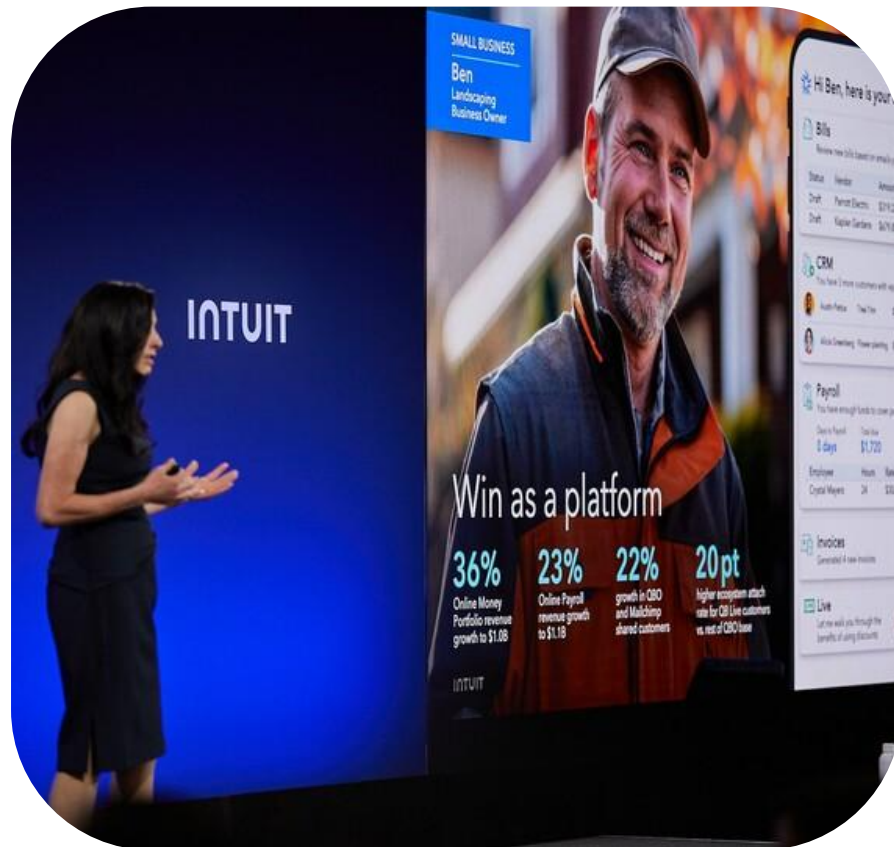
To facilitate the implementation of the recommendations we have created a number of resources for Intuit, including:

- GIS based mapping and database of congressional districts, federal lawmakers, and the committees they sit on
- GIS based mapping analysis of state assembly and senate districts
- Comprehensive analysis of state level climate policy and potential partner organizations

Conclusion

By implementing our recommended continuous improvement process, Intuit will have the ability to refine Success Stories into a powerful engagement tool that leads to better policy outcomes





Thank you

Questions?