

# VALLEY CLEAN ENERGY ALLIANCE

## Staff Report Item - 10

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**TO:** Valley Clean Energy Alliance Board of Directors

**FROM:** Mitch Sears, Interim General Manager, VCEA

**SUBJECT:** Adoption of VCEA Strategic Marketing and Communications Plan

**DATE:** November 16, 2017

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### **Recommendation**

Approve VCEA Strategic Marketing and Communications Plan.

### **Background and Analysis**

The VCEA Strategic Marketing and Communications Plan is designed to serve as a roadmap for the implementation of a marketing program that provides Yolo County residents, businesses, stakeholders, elected officials, and the general public with information about the operations and services provided by VCEA. The plan defines objectives, goals, issues and challenges, target audiences, messaging, communications channels, program timeline, and measurements of success. The primary goals of the Plan are to: (1) educate and inform the general public in Yolo County about VCEA, (2) establish household recognition and trustworthiness for the VCEA brand within the county, and (3) minimize opt-outs while maximizing “opt-ups”. The core objectives of the Plan focus on building program awareness and establishment of public outreach to achieve the Plan goals.

On September 20<sup>th</sup> VCEA Board meeting Circlepoint presented an outline of the Plan. The Board provided initial feedback and directed the VCEA Community Advisory Committee (CAC) to review the Plan. On October 12<sup>th</sup>, the Board received a draft of the Plan. A Subcommittee of the CAC reviewed and provided comments on the draft Plan. Staff and Circlepoint worked with the CAC Subcommittee to address the comments. On November 6<sup>th</sup> the CAC Subcommittee provided a report to the full Committee, recommending approval of the Plan with revisions. The CAC voted unanimously to recommend adoption of the Plan.

The recommended final draft Plan is attached.

### **Attachments**

1. Draft VCEA Strategic Marketing and Communications Plan

# Valley Clean Energy Strategic Marketing and Communications Plan

ATTACHMENT 1

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## Introduction

Valley Clean Energy (VCE) is the Community Choice Energy (CCE) program that will serve as the default electricity service provider to all participating residents, businesses, and agricultural customers in Woodland, Davis, and unincorporated Yolo County. As a community governed power supplier, VCE will empower residents and businesses with a choice in selecting who sources their electricity and what percentage of that power will come from clean sources. VCE has hired Circlepoint, in collaboration with InterEthnica, to develop, launch, and manage a marketing, advertising, and communications campaign that will educate, inform, and raise awareness for the VCE brand and its services for residents and businesses within VCE’s service area.

The following Strategic Marketing and Communications Plan (plan) will serve as a roadmap for the implementation of a marketing program that provides service area residents, businesses, stakeholders, elected officials, and the general public with information about the operations and services provided by VCE. The plan defines objectives, goals, issues and challenges, target audiences, messaging, communications channels, program timeline, and measurements of success.

The plan is intended to be a living document that will be assessed and refined as the campaign is implemented. The plan will also grow and mature alongside the VCE brand to fit the evolving needs of its constituents.

## **Goals and Objectives**

The primary goal of the plan is to educate and inform the general public within the service area about VCE and establish household recognition and trustworthiness for the VCE brand in an effort to establish a successful program with minimal opt-outs.

The core objectives of the plan focus on building brand awareness and established public outreach, so that the brand is recognized by and viewed positively by county residents. VCE participation and consumption of its sub-products means the local community is investing in clean energy, which will help reduce greenhouse gas (GHG) emissions and dependence on exhaustible energy sources. Additionally, establishment of a successful CCE program will allow VCE to reinvest back into the local communities, which benefits the economy.

### **Specific goals and measurements for this plan include:**

1. Provide clear, accurate, and easily accessible program information
2. Establish the brand as a trustworthy source with recognition within the service area, especially among agricultural customers
3. Deliver clear and transparent messaging regarding electricity rates
4. Maintain an opt-out rate below 8% for the default energy product
5. Maximize the number of opt-ups
6. Strengthen brand awareness of the program prior to launch, including its sub-products
7. Promote personal and community ownership of renewable resources

## **Key Issues and Challenges**

CCE programs create customer choice where none existed before. As such, it is expected that there will be challenges with promoting the VCE program. Key anticipated barriers to program

participation include:

1. **Undefined Costs and Rates Prior to Launch:** A program without final product rates can be more difficult to market versus a program with set rates. While estimated rates provide customers with an idea of energy costs, set rates are more advantageous and transparent, especially since rates may only be slightly cheaper or in-line with PG&E at the launch of the program.
2. **Lack of Brand Recognition:** VCE is a new program with little to no brand recognition within the area it will serve. Establishing the VCE brand, and casting the brand in a positive light, will be a key challenge leading up to the launch of the program.

Circlepoint's work with other operational CCEs has shown that additional concerns for many electricity customers include:

- **Trust**—"What's a government agency doing in the electricity business?" Focusing on the aspect of not-for-profit and community control has proven to be key to developing trust and surmounting initial suspicion.
- **Cost**—"How much more will it cost me to buy greener electricity?" Looking issues of cost directly in the eye, even when it's not necessarily to the program's advantage (as may sometimes be the case) is always the best policy. Ultimately, honesty about these issues will earn trust in the brand.
- **Value**—"I know that renewable electricity is better than fossil-fuel-based electricity, but if it costs more I'm not sure it's worth it to me." Addressing bigger-picture issues of the *true* cost of fossil fuels, while retaining relevance to the everyday concerns of people, requires a balanced strategic approach to communication.

This Plan addresses these key issues and other barriers to participation by establishing an overall outreach strategy implemented through specific outreach actions.

## Brand Creation

### Creating a Brand for Customer Understanding

Circlepoint will develop a fully-realized brand, including a logo, which will help to visually tell the VCE story. This brand creation will result in messaging that goes beyond education to convey benefits and create a brand experience that builds trust and shows that choice is, indeed, a benefit to the consumer. Additionally, the brand will connect VCE with the customers that it serves. Branding efforts will ensure that the look and feel of all VCE collateral remain consistent throughout the entirety of the program. This is especially critical during the pre-launch phase.

### Naming Electricity Products (sub-branding)

The creation of sub-brands will establish the different products available through VCE and help further distinguish each product as a unique entity within the overarching VCE brand. The names will be based on the overarching brand personality that has been established for VCE, while suggesting appropriate “levels” to customers. While the product options and details have yet to be established, the naming options will be consist with a default product and a premium product. They will fit within the brand family in a logical and meaningful way, offering not just identifiers but a convenient shorthand for marketing communication.

All of the currently operational CCEs in the state of California have sub-brands for their product offerings, which fit both logically and visually within the overarching umbrella of their main brands. The product branding process will include the distillation of a few key, well-considered sub-brand options along with graphic representations for each that fit with the overall brand and program goals.

## **Target Audiences**

The cities of Woodland, Davis, and unincorporated Yolo County have a diverse population with a variety of cultural backgrounds, ages, education and income levels. In order to establish effective communications, it is essential to define target audiences to help inform key messaging. The diverse population creates a variety of motivations for potential VCE customers, ranging from economic impact to environmental sustainability. In many cases, different groups share basic concerns, but each may have its own specific perspective. The Plan maps out the diversity of target audiences:

1. General Residential Customers/PG&E customers
2. Commercial/industrial/business, with focus on agricultural audiences
3. Multicultural audiences
4. Advocates, champions, and early adopters
5. Seniors
6. Solar customers
7. Low income residents
8. City and county chambers of commerce
9. Unincorporated areas and neighborhood groups
10. Elected officials

For more information about the target audiences, their unique motivations, and the preliminary tailored messages, see the Messaging Framework in section 6 of this document.

## **Agricultural Communications and Outreach**

Agricultural and rural customer communications and outreach will be critical to the success of VCE. The agricultural audience is seen as a large customer class with specific needs that are unique to the VCE service area. Establishing trustworthiness is of particular importance to this group. We anticipate that the single most important message that this audience will be interested in is cost. For those seeking to reduce their costs, Circlepoint will provide information on rates that clearly conveys that rates meet the goal of cost competitiveness (or better), than those offered by the incumbent utility provider.

By recognizing VCE services may not be especially suitable for certain ag businesses, tailored materials will communicate about the potential concerns of and potential barriers for this audience, while emphasizing the benefits that align with their unique needs and motivations. Another key point to emphasize with this audience is that VCE will be a better, more reliable partner. As a complement to the messages around program costs and reliability, messaging will highlight the local control aspect of CCE.

Circlepoint will make a special effort to reach agricultural audiences throughout program launch by reaching them where they are and through their preferred channels. The team will work with the VCE Advisory Committee and VCE staff to identify trusted partners, such as the Yolo County Farm Bureau, in order to reach this customer group effectively. The team will also get input from other industry organizations such as cattlemen's associations, organic farmers and small farm operations. Input from all of these sources will inform the best approach to engaging these customers, and the draft messaging. These trusted sources will also help identify members of the local ag community who may become brand champions. These champions may be interested in being featured in our advertising campaign and help us increase brand awareness through word of mouth.

Circlepoint will also develop custom collateral like an agricultural customer toolkit that is tailored to the key concerns and interests of this important customer group. The toolkit will emphasize program cost savings, local control, and local benefits and will serve as a tool to help develop brand champions who can help spread the word about VCE. The toolkit will also include tailored information about enrollment, cost and rates, potential savings data, and FAQs.

### **Multicultural Communications and Outreach**

VCE is committed to providing support and resources for customers for whom English might be a second language. Due to the diversity of the service area's population, all messaging, notices, advertising, and marketing must be multilingual. In Yolo County, the population aged 5 and older who speak a language other than English at home is 64,337 persons, which represents 35% of the population.. This rate is less than the state rate of 43%. Of these languages other than English spoken at home, Spanish represents nearly 60% in the VCE service territory. Knowing that there is a large percentage of the population who prefer Spanish-language, collateral that includes pertinent information about VCE services will be developed to

include Spanish language to maximize efficiency and amplify customer education.

Circlepoint and InterEthnica will work together to develop tailored marketing and outreach materials for target audiences of all ethnic and socioeconomic backgrounds. The team will create culturally appropriate messaging in-language that will resonate with each audience, building authenticity and trust.

For non-English speakers, Circlepoint will produce materials translated in multiple languages. Materials will include clear graphics, for audiences who may have limited reading abilities in their own language. Informational materials for multi-cultural communications and outreach will also include English, because many of the county's non-English speakers, as well as those persons that are Limited English Proficient (LEP), demonstrate a measurable understanding and familiarity with English. Therefore, the inclusion of English on all materials gives the LEP and bilingual residents the ability to cross-reference information in two languages. This approach is especially valuable to bilingual persons for two reasons:

1. Bilingual persons born in the U.S. who use their first language primarily at home are often accustomed to using English outside of the home.
2. Many non-English speakers do not trust the quality of translated text and feel reassured when they cross-reference information with written English text that they may understand just as well.

In addition to in-language advertising strategies, Circlepoint will employ grassroots engagement tactics to reach multicultural populations within the service area, such as partnering with religious and social-service institutions to reach these audiences through trusted channels. The team will distribute materials through community-based organizations and in public locations where audiences may turn to services such as check cashing locations, laundromats, and grocery stores,

The Yolo County Housing Authority could be a potential partner for materials distribution as the work with low income and affordable housing agencies. Because audiences already seek the help and resources of the agency, this partnership would be a key authority to distribute messaging and inform about VCE.

The team will also engage the various ethnic chambers of commerce to frame participation in VCE as the new status quo for sustainable businesses. This will provide an opportunity to request that businesses promote the program on their websites, social channels, and other communications platforms.

Call Center scripting and training will also be developed to support VCE's bi-lingual objectives.

In addition, the selected SMUD Call Center services support non-English speaking customers (multi-lingual).

## Messaging

Overall Messaging Options:

1. Cleaner energy at competitive prices.
2. We have the power. Independent, local energy.
3. Our community. Our power. Our choice.
4. Rates you can depend on.
5. The grass is greener when the energy is cleaner.
6. See more green when you switch to clean.

The draft messages listed below touch on the topics that the specific audiences care about. These messages speak to their motivations and what will resonate. The messaging framework below will help to inform future collateral development, advertising, and other outreach materials.

Messaging Framework		
Audience	Key Motivations	Preliminary Sub-messages
General Audience/Customers at large/PG&E customers	<ul style="list-style-type: none"> <li>● Environmental health</li> <li>● Reliability</li> <li>● Cost</li> <li>● Choice</li> <li>● Local control</li> <li>● Not for Profit</li> </ul>	<ul style="list-style-type: none"> <li>● Valley Clean Energy is bringing cleaner energy at competitive rates to residents and businesses in Woodland, Davis, and unincorporated Yolo County.</li> <li>● VCE provides an alternative to PG&amp;E and gives our member communities a choice in how much of our electricity comes from renewable sources.</li> <li>● VCE offers clean, affordable energy you can count on.</li> <li>● Choosing VCE means cleaner energy at competitive rates provided by a local not for profit committed to returning value to our communities.</li> <li>● Investing in clean energy is an investment in our community's future.</li> </ul>



		<ul style="list-style-type: none"> <li>• The choices we make now impact future generations. Choose clean, renewable energy for a healthier Yolo County.</li> </ul>
Agricultural and rural customers/ unincorporated areas and neighborhood groups	<ul style="list-style-type: none"> <li>• Cost</li> <li>• Reliability</li> <li>• Environmental health</li> <li>• Choice</li> <li>• Local control</li> <li>• Better partner</li> </ul>	<ul style="list-style-type: none"> <li>• With the support of agricultural leaders like you, we can work together to help make the cities of Woodland, Davis, and unincorporated areas of Yolo County a better place for the industry to thrive. Valley Clean Energy will provide locally controlled, clean electricity at competitive rates and will be the official electricity provider for all energy customers in Woodland, Davis, and unincorporated areas of Yolo County.</li> <li>• Cleaner energy is more affordable than you think. Valley Clean Energy offers clean, affordable energy you can count on.</li> <li>• Valley Clean Energy is a better partner for local agriculture. Community energy means cost competitive, stable rates.</li> <li>• Valley Clean Energy is good for our community and the economy by bringing you a local choice for your clean power.</li> </ul>
Champions	<ul style="list-style-type: none"> <li>• Leading by example</li> <li>• Environmental health</li> </ul>	<ul style="list-style-type: none"> <li>• Thanks for helping lead the charge against climate change! Your help will bring clean energy to our communities and will help create local, renewable jobs!</li> <li>• Help our community exceed our clean energy goals.</li> <li>• Choosing VCE's 100% renewable energy option is an easy way to contribute to greenhouse gas reduction and a more sustainable Yolo County. With this option, 100% of your electricity supply will</li> </ul>

		<p>be sourced from clean, not-for-profit energy.</p> <ul style="list-style-type: none"> <li>Interested in helping us get the word out about Valley Clean Energy? Become a VCE champion!</li> </ul>
Seniors	<ul style="list-style-type: none"> <li>Impact on future generations</li> <li>Leading by example</li> <li>Trust</li> <li>Cost</li> </ul>	<ul style="list-style-type: none"> <li>Valley Clean Energy offers clean, affordable local energy you can count on.</li> <li>It's time we had a choice. Clean energy is coming to your neighborhood.</li> <li>Make a difference for future generations. Choose local sustainable energy.</li> </ul>
Solar customers	<ul style="list-style-type: none"> <li>Cost</li> <li>Choice</li> <li>Maintenance</li> </ul>	<ul style="list-style-type: none"> <li>Harness your solar power for additional savings. Valley Clean Energy's net energy metering program allows customers with rooftop solar panels on their home or business get the full retail value of the electricity their system generates. When your panels produce more electricity than you use, you receive a credit on your bill.</li> <li>If you need additional electricity when the skies are gray, Valley Clean Energy is here for you with affordable, reliable clean energy</li> <li>We know you care about the environment. Valley Clean Energy provides cleaner energy at competitive prices.</li> </ul>
Low income residents	<ul style="list-style-type: none"> <li>Cost</li> <li>Retention of CARE/FERA programs</li> <li>Stable rates</li> <li>Health (Low-income communities traditionally have</li> </ul>	<ul style="list-style-type: none"> <li>You don't have to pay more for clean energy. If you're enrolled in any of PG&amp;E's discount programs, you will continue to get your discounts with Valley Clean Energy. There's no need to reapply for: California Alternative Rates for Energy (CARE), Federal Electric Rate Assistance (FERA),</li> </ul>

	<p>larger numbers of people suffering from asthma)</p>	<p>Medical Baseline Allowance (MBA) and the Low Income Home Energy Assistance Program (LIHEAP). You'll continue to receive these rate discounts once you're automatically enrolled, with the added benefit of receiving cleaner electricity at even lower rates.</p> <ul style="list-style-type: none"> <li>• Make the local choice for clean energy without the extra cost. Valley Clean Energy offers clean, affordable local energy you can count on, and your cost savings contributes to your local economy.</li> </ul>
<p>Commercial/industrial/business /chambers of commerce</p>	<ul style="list-style-type: none"> <li>• Cost</li> <li>• Local focus</li> <li>• Reducing pollution</li> <li>• Reputation among socially conscious customer groups</li> </ul>	<ul style="list-style-type: none"> <li>• Valley Clean Energy offers a local choice for cost competitive, clean energy your business can rely on.</li> <li>• Valley Clean Energy is good for business. Your company will benefit from competitive rates, while helping your business meet sustainability goals. You'll also be helping stimulates the health of the local economy and environment.</li> <li>• Your community is counting on you. Power your business with clean energy from Valley Clean Energy. When you support clean, local energy, you support economic growth in our communities. Earnings will help fund local economic development with green energy projects and energy efficiency programs.</li> </ul>
<p>Elected officials</p>	<ul style="list-style-type: none"> <li>• Serving constituents needs/desires</li> <li>• Local focus</li> <li>• Impact on future generations</li> <li>• Cost</li> <li>• Meeting climate</li> </ul>	<ul style="list-style-type: none"> <li>• Valley Clean Energy is the most efficient route to reduced GHGs and meeting our communities' climate action goals. When you support clean, local energy, you support economic growth in your County.</li> <li>• A cleaner future is a greener</li> </ul>

	goals set by CA governor	<p>future. Valley Clean Energy offers clean, local energy for sustainable growth in your County. The choices we make now impact future generations. Choose clean energy for a healthier tomorrow..</p> <ul style="list-style-type: none"> <li>● Clean energy is the future. Support Valley Clean Energy to help lead your county into a bright economic future.</li> </ul>
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## Communication Channels

Messaging and public outreach are only effective when the target audiences receive the messages that are intended for them. Today, market segmentation means a diverse audience receives messages from a variety of mediums, through a range of channels. In order to maximize reach, Circlepoint will employ a wide variety of communications channels to raise awareness and enhance brand recognition for VCE. Leveraging existing communications channels and other resources help to maximize efficiency.

The Plan outlines the following communications channels:

Media	Materials	Implementation
Program Collateral	<ul style="list-style-type: none"> <li>● Business toolkit</li> <li>● Agricultural toolkit</li> <li>● Senior Buddy training guide</li> <li>● Animated video</li> <li>● Factsheets</li> <li>● Brochures</li> <li>● Poster</li> <li>● Flyers</li> <li>● Banner</li> <li>● Window cling</li> <li>● FAQs</li> <li>● PowerPoint template</li> <li>● Customer enrollment notices</li> </ul>	<ul style="list-style-type: none"> <li>● Distribute collateral at tabling during community events and through community organizations.</li> <li>● Print collateral will be created in a bilingual format.</li> <li>● Distribute noticing by mail, per the requirements outlined in the outreach and communications plan. Distribute/post posters and postcards in public locations, such as libraries, City/County facilities, senior centers, and veteran centers</li> <li>● Develop tailored marketing and outreach materials for non-English speaking customers</li> </ul>

Website	<ul style="list-style-type: none"> <li>● Translations</li> <li>● Rates pages</li> <li>● Rates calculator</li> <li>● Media page</li> <li>● Opt-in/out content</li> <li>● Sign-up forms</li> <li>● Enrollment maps</li> <li>● Partner website badge</li> </ul>	<ul style="list-style-type: none"> <li>● Employ bilingual site in English and Spanish</li> <li>● Conduct website audit</li> <li>● Implement site enhancements including social media integration, rate calculator, and a progress tracker</li> <li>● Include testimonials from opinion leaders from all three jurisdictions and different stakeholder groups as good way to provide positive messaging about Valley Clean Energy and hopefully answer questions residents and businesses may have about the program.</li> </ul>
Email Marketing	<ul style="list-style-type: none"> <li>● Email templates</li> <li>● Content and graphics</li> </ul>	<ul style="list-style-type: none"> <li>● Distribute informational content through VCE's existing listserv email database. Add new email addresses through social media campaigns, a sign up option on the VCE website and at tabling events.</li> <li>● Develop regularly scheduled email blasts.</li> </ul>
Advertising	<ul style="list-style-type: none"> <li>● Print</li> <li>● Radio</li> <li>● Transit</li> <li>● Digital</li> <li>● Outdoor</li> <li>● Social media</li> </ul>	<ul style="list-style-type: none"> <li>● See media plan.</li> </ul>
Social Media	<ul style="list-style-type: none"> <li>● Social media graphics</li> <li>● Editorial content</li> </ul>	<ul style="list-style-type: none"> <li>● Develop the following social media accounts: <ul style="list-style-type: none"> <li>● Facebook</li> <li>● Twitter</li> <li>● YouTube</li> <li>● LinkedIn</li> </ul> </li> <li>● Develop and post relevant content on VCE social media pages by creating an editorial calendar for timely and regular posts.</li> <li>● Engage via NextDoor</li> </ul>
Events and In-person	<ul style="list-style-type: none"> <li>● Develop list of events, neighborhood, and</li> </ul>	<ul style="list-style-type: none"> <li>● Attend pertinent community and stakeholder meetings, events</li> </ul>

Outreach	<ul style="list-style-type: none"> <li>stakeholder meetings</li> <li>Attend or “piggyback” on existing community events, such as farmers markets. Community events will be determined.</li> <li>Program Collateral</li> </ul>	<ul style="list-style-type: none"> <li>Use events as an opportunity to distribute informational material, collect input, gather email addresses and engage the public.</li> <li>Engage CAC members to support in-person outreach.</li> <li>Engage community organizations to support in-person outreach.</li> </ul>
Earned media	<ul style="list-style-type: none"> <li>Press kit</li> <li>Press releases</li> <li>Op-eds and news articles</li> <li>Multicultural media</li> <li>Ongoing media outreach</li> <li>Speakers Bureau with Board Members</li> </ul>	<ul style="list-style-type: none"> <li>Engage local media, specialized media and community bloggers for earned placement as identified in the outreach and communications plan.</li> <li>Develop news alerts and press releases for key milestones, human interest stories and other unique and interesting aspects of VCE.</li> <li>Celebrate successes.</li> <li>Conduct outreach to ethnic media</li> </ul>
Call Center Scripting	<ul style="list-style-type: none"> <li>Call center script</li> </ul>	<ul style="list-style-type: none"> <li>Develop script for call center agents.</li> </ul>
On-call tasks	<ul style="list-style-type: none"> <li>VCE board presentations</li> <li>Planning calls</li> <li>Reporting</li> </ul>	<ul style="list-style-type: none"> <li>In addition to providing VCE board with marketing and outreach updates, Circlepoint will compile regular progress, tracking, and reports</li> </ul>

**Stakeholder Outreach**

Outreach to local neighborhood and community groups, business groups, and elected officials is essential to identify and engage program champions and seed natural dissemination of program awareness into communities served by VCE. This is the best opportunity for VCE Board Members to get involved and help build and empower those champions.

For special customer classes, such as large commercial, industrial and solar customers, SMUD’s key account reps will provide input on messaging and review draft materials to ensure materials as tailored effectively for these customers.

**In-Person Meetings/Presentations**

Circlepoint, VCE staff, and trained advocates will reach out to the community groups and centers listed below and make presentations during their normally scheduled meetings and/or activity sessions. In the event that a VCE board member would like to attend the meeting and

present on behalf of the program, Circlepoint will prepare talking points to ensure the member has adequate information for a successful presentation. Initial outreach to these organizations will also serve as an opportunity to vet our tailored messaging and materials for their audiences.

Dates for each meeting will be scheduled as the program gets closer to public advertising in early 2018.

These groups will include:

<b>CBOs</b>	<b>Agencies/Organizations</b>
<ul style="list-style-type: none"> <li>● VCE Advisory Committee</li> <li>● Capay Valley Advisory Committee</li> <li>● Clarksburg General Plan Advisory Committee</li> <li>● South Davis General Plan Advisory Committee</li> <li>● Yolo-Zamora Advisory Committee Churches</li> <li>● Davis Joint Unified School District</li> <li>● Woodland Joint unified School District</li> <li>● Esparto Unified School District</li> <li>● UC Davis</li> <li>● Woodland Noon Rotary</li> <li>● Woodland Sunrise Rotary</li> <li>● Davis Noon Rotary</li> <li>● Davis Sunrise Rotary</li> <li>● Davis Sunset Rotary</li> <li>● Kiwanis Davis</li> <li>● Woodland Kiwanis Club</li> <li>● Clergy and congregations, including ecumenical and inter-faith groups</li> <li>●</li> </ul>	<ul style="list-style-type: none"> <li>● County service areas               <ul style="list-style-type: none"> <li>○ <u>Dunnigan CSA</u></li> <li>○ <u>El Macero CSA</u></li> <li>○ <u>Garcia Bend CSA</u></li> <li>○ <u>North Davis Meadows CSA</u></li> <li>○ <u>Snowball CSA</u></li> <li>○ <u>Wild Wings CSA</u></li> <li>○ <u>Willowbank CSA</u></li> </ul> </li> <li>● Yolo County Farm Bureau</li> <li>● Yolo County Housing Authority</li> <li>● Yolo Flood and Irrigation District</li> <li>● Davis Downtown Business Association</li> <li>● Historic Woodland Downtown Business Association</li> <li>● Woodland Chamber of Commerce</li> <li>● Davis Chamber of Commerce</li> <li>● California Hispanic Chambers of Commerce</li> <li>● Local environmental groups (i.e., Davis, Woodland Sierra Club; Cool Davis, Audubon)</li> </ul>

**Phone Calls and Material Distribution**

For groups where it is impractical or not possible to meet with in person, we will call them to discuss VCE over the phone, and email materials for leaders to distribute to their groups. This outreach will occur at the same time as the group meetings listed above, to complement that work.

These groups will include:

<b>CBOs</b>	<b>Agencies</b>	<b>Ag industry organizations</b>	<b>Businesses/ associations</b>
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<ul style="list-style-type: none"> <li>● Soroptimists International of Woodland</li> <li>● Capay Valley Vision</li> <li>● Woodland Community College</li> <li>● League of Women Voters of Woodland</li> <li>● Yolo County Office of Education</li> <li>● Los Rios Community College District</li> </ul>	<ul style="list-style-type: none"> <li>● Unions/ Central Labor Council</li> <li>● Operating Engineers Local 39</li> <li>● Carpenters Local Union</li> <li>● Clarksburg Fire District</li> <li>● Yolo Emergency Communications Agency</li> <li>● Woodland-Davis Clean Water Agency</li> <li>● Richard Heath and Associates (RHA)</li> <li>● Yolo Flood and Irrigation District</li> </ul>	<ul style="list-style-type: none"> <li>● Organic Farmers</li> <li>● Full Belly</li> <li>● Pacific Coast Producers</li> <li>● Seed Co's</li> <li>● Yolo Land Trust</li> <li>● Farm Fresh to You</li> <li>● Farm Circle</li> <li>● PTAs in all jurisdictions</li> <li>● Yolo Energy Watch and participating groups</li> <li>●</li> </ul>	<ul style="list-style-type: none"> <li>● Yolo County Visitor Bureau</li> <li>● Clark Pacific</li> <li>● Target Distribution Center</li> <li>● Rite Aid Distribution Center</li> <li>● Hotels</li> <li>● Davis Rental Housing Association</li> <li>● Hospitals</li> <li>● Local realtor's associations</li> <li>● Local apartment associations</li> <li>● Senior citizen organizations</li> <li>● Mobile home associations (both coach owners if they pay electricity and/or park owners for master metered parks)</li> </ul>
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**Public Forums**

The communications program will explore the possibility of holding public forums in each of the member jurisdictions to receive input (and answer questions) from customers and provide information. Similar forums could also be held with different stakeholder groups (i.e., ag community, large industrial users, chambers of commerce).

**Media Plan**

The proposed media plan includes a robust effort - 18 weeks of advertising, from March to June 2018, to reach audiences across Yolo County about the VCE program roll-out.

Circlepoint will run preliminary digital ads in order to test messaging and graphics and to grow our following on Facebook. The ads that perform the best will be used to launch the campaign's



full media buys. With additional funding, we can extend the length of the advertising buy and add additional channels.

We will create a full media plan with a matrix of media buys as we get closer to the advertising launch date.

## Collaboration with VCE Staff

Based on their experience with other CCEs, Circlepoint has provided the full suite of marketing and communications services as the programs gradually build their staff. Once CCEs have more in-house marketing resources, such as a Director of Marketing or Marketing Manager, Key Account Rep, and Outreach Associates or Interns, the in-house team typically leads specific activities, such as direct customer engagement and outreach. Circlepoint has continued to be agency support to them, providing communications strategy, advertising, graphic design, and web maintenance services. The Plan envisions a similar transition here, and the Circlepoint team will continue to support VCE staff through the process.

## Project Timeline

In addition to the below timeline, a more detailed document will be developed to outline the outreach activities and the specific dates/responsibilities to track when in-person meetings will take place and who is assigned to them.

Task	Deliverables	Timing
<b>Communications and outreach plan</b>	<ul style="list-style-type: none"> <li>● Final communications and outreach plan</li> <li>● Messaging framework</li> </ul>	September 2017 - October 2017
<b>Program Branding, Design, Identity</b>	<ul style="list-style-type: none"> <li>● VCE logo</li> <li>● Sub-product(s) and program name</li> <li>● Sub-product(s) and program logo</li> <li>● Branding guidelines</li> <li>● Business toolkit</li> <li>● Agricultural customer toolkit</li> <li>● Senior buddy training guide</li> <li>● Animated video</li> <li>● Factsheets (2)</li> </ul>	September 2017 - January 2018

	<ul style="list-style-type: none"> <li>● Brochures (2)</li> <li>● Poster</li> <li>● Flyers (2)</li> <li>● Banner</li> <li>● Window cling</li> <li>● FAQs (2)</li> <li>● PowerPoint template</li> </ul>	
<b>Website</b>	<ul style="list-style-type: none"> <li>● Content development</li> <li>● Sitemap and wireframes</li> <li>● Visual mockups</li> <li>● Rates pages</li> <li>● Media Page</li> <li>● Social media integration</li> <li>● Opt-up, Opt-out, Early adopter pages</li> <li>● Sign-up forms</li> <li>● Progress tracker</li> <li>● Rate calculator</li> <li>● Abbreviated page translations in Spanish language</li> </ul>	<p>Phase 1 Launch – November</p> <p>Phase 2 Launch – April 1</p>
<b>Program Outreach Support</b>	<ul style="list-style-type: none"> <li>● Outreach toolkit</li> <li>● In-person engagement</li> <li>● List of in-person engagement opportunities</li> <li>● Email newsletter engagement</li> <li>● Monthly written content and images</li> <li>● Support efforts and training</li> <li>● Two (2) trainings for advocates</li> <li>● Branded giveaway items</li> <li>● Booth/tabling event banners</li> </ul>	<p>September 2017 – May 2018</p>
<b>Pre-launch Marketing Campaign</b>	<ul style="list-style-type: none"> <li>● Comprehensive and multi-lingual paid advertising campaign</li> <li>● Advertising campaign artwork</li> <li>● Photography shoot</li> <li>● Stakeholder/partner network communications</li> </ul>	<p>September 2017 – June 2018</p>

<b>Social media</b>	<ul style="list-style-type: none"> <li>• Establish social media accounts for Facebook, Twitter, YouTube, and LinkedIn</li> <li>• Create monthly calendar of social media posts</li> </ul>	November 2017 – June 2018
<b>Media Planning and Buying</b>	<ul style="list-style-type: none"> <li>• Advertising media plan</li> <li>• Secure advertising placements</li> </ul>	November 2017 – March 2018
<b>Media Relations</b>	<ul style="list-style-type: none"> <li>• Mainstream and multicultural media relations</li> <li>• Press kit</li> <li>• Up to three (3) press releases</li> </ul>	April 2018 – June 2018
<b>Customer Notification</b>	<ul style="list-style-type: none"> <li>• Development, design and delivery of four (4) opt-out notifications sent via USPS mail</li> </ul>	November 2017 – July 2018
<b>Call center scripting</b>	<ul style="list-style-type: none"> <li>• One (1) final call center script</li> </ul>	November 2017 – December 2017
<b>On-call and As-Needed Tasks</b>	<ul style="list-style-type: none"> <li>• Up to four (4) VCE Board presentations</li> <li>• As-need and/or regular project team calls</li> </ul>	August 2017 – June 2018

## Success Measurements

These quantitative measurements will serve as the barometer for the effectiveness of the campaign:

1. Residential opt-out rate
2. Business opt-out rate
3. Residential and business opt-up rate

4. Social media followers
5. Social media conversations, engagement, and viral spread
6. Website traffic, usage, and patterns
7. Email sign-ups and engagement
8. Attendance at meetings and events
9. Advertising reach, impressions, and effectiveness
10. Media coverage

Throughout the life of the campaign, Circlepoint will engage in ongoing tracking and evaluation and create reports with both detailed and summary information. In addition, Circlepoint will utilize SMUD outreach resources as a “sounding board” to provide an additional expert perspective on key VCE outreach actions and activities. Tracking and reporting these indicators on a frequent and regular basis will enable the team to make adjustments to strategies, tactics, and messages during the campaign.