

VALLEY CLEAN ENERGY ALLIANCE

Staff Report - Item 13

TO: Board of Directors

FROM: Rebecca Boyles, Director of Customer Care and Marketing

SUBJECT: Adopt Valley Clean Energy 2021 Outreach and Marketing Plan

DATE: February 11, 2021

RECOMMENDATION

Adopt the 2021 Outreach and Marketing Plan.

BACKGROUND AND ANALYSIS

In 2020, the Valley Clean Energy Board of Directors adopted a Strategic Plan to better guide VCE's organizational mission, vision and strategies. The Plan was adopted after significant feedback from the Board of Directors, Community Advisory Committee (CAC), consultants and VCE staff. The Strategic Plan lays out goals and objectives meant to guide the organization in planning and decision-making for the next 3 years.

Draft 2021 Outreach and Marketing Plan

The attached draft 2021 Marketing Plan directs marketing and outreach strategy for the coming year and is designed to help implement VCE's Strategic Plan. The key goals in the Marketing Plan for 2021 include:

1. Increase customer satisfaction and retention
2. Establish VCE as a trusted community resource
3. Support VCE's Programs Plan and Decarbonization Roadmap

Goal 1 begins with research, such as focus groups and surveys, to better understand the wants and needs of our customers and member communities. Improving customer data analytics is an important part of Goal 1, and staff has already begun this process. The Board has expressed a keen interest in ensuring we retain customers as much as possible, as well as a desire to better serve customers in disadvantaged and underserved communities. Several tactics in Goal 1 help to serve these purposes, including analyzing opt-out reasons by customer segment, or conducting outreach for the Arrearage Management Plan. VCE will focus on customer satisfaction and retention in 2021 and set a goal for increasing the VCE participation rate in 2022-2023.

Goal 2's main objective is to establish VCE as a trusted community resource by increasing brand recognition and building trust with our customers and community partners. To further establish VCE as an expert, we will increase our thought leadership and expertise in the field, build deeper partnerships in the community, and continually improve the quality of our collateral, website and social media. In order to demonstrate our commitment to Environmental Justice, we will analyze our service levels to customers speaking languages other than English, and ensure our collateral is translated accordingly. We would ultimately like the community to view VCE as a trusted resource in energy matters, from energy efficiency to time-of-use rates.

Goal 3 is to support VCE's Programs Plan and Decarbonization Roadmap, and to further engage the public and private sector (through marketing and outreach) in lowering their emissions. Key components of Goal 3 include campaigns to increase subscription in 100% renewable UltraGreen, as well as helping to support the marketing and outreach efforts associated with the Decarbonization Roadmap once it is approved by the Board.

The direction in the 2021 Marketing Plan will help to guide the marketing team's campaigns for the calendar year 2021 and will be updated annually. To accompany the Plan, tasks will be detailed in a project management platform along with timelines so that the VCE team can more easily connect the strategic vision to their day-to-day tasks, as well as report on progress.

The draft 2021 Marketing Plan has been reviewed by the CAC, the CAC's Outreach Task Group (OTG), and VCE staff and consultants. Several actions detailed in the Plan are already underway and will continue if the draft Plan is adopted by the Board, such as gathering data to compile customer and marketing dashboards, as well as making improvements to VCE's website.

CAC Input

The CAC and the OTG provided feedback at various points in the Plan's development. Staff believes that the feedback process improved and helped refine the draft Plan. Examples of key adjustments include:

- Add a focus on customer and member community needs, wants and concerns to the current approach that centers on the value that VCE offers to its customers and communities.
- More use of data to better inform outreach and marketing efforts (e.g. conduct trends analysis on opt-outs, programs and other customer concerns).
- Refine metrics to make them more meaningful to VCE and its customers (e.g. shifted metric related to "increase customer satisfaction and retention" goal to "translate all marketing collateral within a certain timeframe").

In addition to the examples of key refinements noted above, the CAC and OTC made many suggestions on specific tactics that have been incorporated into the Plan. Examples include:

- Development of point-of-sale collateral so that companies can distribute VCE material to show their support and be recognized as a "green business."

- Include the VCE newsletter as a key resource in garnering trust as an industry expert.
- Definition of some terms (such as social media impressions).

The CAC voted unanimously at its January meeting to recommend adoption of the draft Plan.

CONCLUSION

If approved, the draft Plan would direct VCE's marketing and outreach strategy for the coming year and help to implement VCE's Strategic Plan.

ATTACHMENT

1. Draft 2021 Outreach and Marketing Plan



VALLEY
CLEAN ENERGY

Marketing Plan

January-December 2021



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DRAFT

Executive Summary

In 2020, Valley Clean Energy (VCE) crafted a Strategic Plan to better guide our organizational mission, vision and strategies. The Plan was adopted by the Board of Directors after feedback from the board, consultants, the Community Advisory Committee (CAC), and VCE staff. The Strategic Plan lays out goals and objectives meant to guide VCE staff, the Board, and the CAC in planning and decision-making for the next 3 years.

The 2021 Marketing Plan is meant to complement VCE's Strategic Plan and to give further direction with regards to marketing and outreach strategy, in turn helping to guide staff's daily tactics and workflows. The Plan will be updated annually. To accompany the Marketing Plan, tasks will be detailed in the project management platform Monday.com, complete with Gantt Charts to provide timelines so that the team can connect the strategic vision with their day-to-day tasks. This Marketing Plan is meant as a guide for 2021, but sets the stage for subsequent years, and in some cases mentions 2022 and 2023 marketing goals.

The Marketing team will focus on 3 main goals in 2021:

1. Increase customer satisfaction and retention
2. Establish VCE as a trusted community resource
3. Support VCE's Programs Plan and Decarbonization Roadmap

These goals will guide the team's projects, campaigns, and social media; however, due to the time sensitive nature of some aspects of marketing and communications, not all marketing activities will be captured in this Plan. Some activities detailed in the Plan are already in progress, and the Plan was reviewed by the Outreach Task Group and the Community Advisory Committee before being submitted to the Board of Directors for adoption.

Progress in 2020

The marketing team, with support from VCE staff, contractors, the Community Advisory Committee, the Outreach Task Group, and the Board of Directors advanced several key initiatives in 2020. The monthly enrollment of PG&E Net Energy Metering (NEM) customers began, as well as the recruiting, hiring, and training of a new Director of Customer Care and Marketing. June saw VCE's second anniversary of providing service, which was commemorated with Second Anniversary print advertisements and accompanying social media. VCE staff, the Customer Care team, the Community Advisory Committee and the Board of Directors, and contractors all transitioned to a remote work environment because of the coronavirus pandemic and adapted to the change with virtually no negative impacts to business.

Supporting the Winters enrollment with compliance mailers, presentations, advertisements, and outreach dominated the second half of 2020. During these large initiatives, the marketing team contributed to the Strategic Planning process and executed website improvements, including translating more VCE material into Spanish to be accessible to our customers. Other large

projects throughout the year included an interactive energy efficiency graphic and a City of Winters page as a resource for customers enrolling in 2021. The team worked hard to realize innovations that saved paper and money, such as sending the Joint Rate Mailer and Power Content Label to customers via email for the first time. The team introduced new marketing analytics at the end of 2020 and will continue to build on our data infrastructure to better guide marketing and outreach decision-making. VCE's Twitter following grew by over 100% in 2020 (over 500 followers), with over 51 million impressions made¹. The team kept the local papers busy, with 14 press releases and 3 op-eds from Board of Directors and Community Advisory Committee members.

2020 was a landmark year for many reasons, and in response to social issues such as systemic racism and environmental injustice taking center stage in our country, the VCE board established a Working Group on Environmental Justice. The marketing team supported the working group by drafting a Statement on Environmental Justice, revising it after seeking stakeholder feedback, and securing its adoption by the Board of Directors. Statement adoption was not a singular task, as VCE staff, the Community Advisory Committee and the Board of Directors all feel strongly about furthering the cause of environmental justice by not just issuing a statement, but also changing what is within our purview to do so. 2021 will see plans to implement the action items in the statement, as well as to augment our marketing and outreach efforts to customers in emerging and historically marginalized communities.

Looking forward to 2021, 2022 and 2023 will realize escalating challenges for the marketing team, such as regulatory and legislative uncertainty, the transition of both residential and non-residential accounts to default time-of-use rates, and a (projected) short-term reduction in the percentage of renewables in VCE's portfolio. VCE will have to remain nimble and pivot some of our past messaging of low-cost clean energy to promoting our enhanced community benefits through programs, engagement, and local control. However, we do not face these challenges alone, and we will work closely with our sister agencies across California to reach our customers with the message about the cumulative Community Choice Aggregation (CCA) impact on greenhouse gas (gHg) emissions reductions, new local renewable projects, and the advancement of technologies such as battery storage and demand response programs.

¹ Twitter "impressions" include all the times the Tweet has been seen. This includes appearing in a followers' timeline as well as the times it appeared in search, or as a result of someone liking the tweet.

Goals

Goal 1: Increase Customer Satisfaction and Retention

While VCE's customers are automatically enrolled in our electric generation services, one of the core tenets of Community Choice Aggregation programs is to provide product choice to customers. Therefore, one of the main goals in VCE's marketing strategy is to provide information about the choice customers have in their electricity service. The first two years of operation, VCE's marketing and outreach efforts were focused on brand awareness. In the next two years, VCE will conduct research (such as focus groups and surveys) to better understand the wants and needs of our customers and member communities, and to tailor our marketing and outreach strategy to the benefits deemed most important to our customers. We want to convey to our customers and community that we listen and respond to their needs.

The board has expressed a keen interest in ensuring we retain customers as much as possible, and currently we are experiencing some challenges in the legislative and regulatory landscapes that threaten the value proposition of "cleaner electricity at competitive rates." Therefore, VCE must adapt to the changing landscape by pivoting some of our messaging to better emphasize the many benefits we provide to our customers, including choice, accessibility, and customer programs. Delineating these benefits more clearly could lead to more engaged customers that choose to participate in VCE rather than opt out. VCE will focus on customer satisfaction and retention in 2021 and set a goal for increasing the VCE participation rate in 2022-2023.

Core Messaging - messages customers receive as a result of Goal 1 tactics and campaigns:

- I **understand** VCE's services
- Being a VCE customer has **more benefits** but costs about the same
- By supporting VCE, I am **supporting my community**

Tactics

1. Better understand the needs/wants of customers and member communities
 - a. Improve customer analytics and data
 - i. Report out monthly to Outreach Task Group (OTG) and Green Ideals
 1. Include: social media metrics, website metrics, customer data to inform trends analysis of opt-outs, CARE/FERA², Medical Baseline³, etc.
 - ii. Conduct and report on analysis of trends
 1. Include trends analyses in monthly report out starting in Q3 2021
 - iii. Request inexpensive data: demographic/census data
 - iv. Report annually to OTG, CAC and Board of Directors in a Year-end Marketing and Customer Care review

² California Alternate Rates for Energy Program (CARE) and Family Electric Rate Assistance Program (FERA) are statewide discount programs for eligible low-income customers

³ The Medical Baseline Allowance is an assistance program for customers who depend on power for certain medical needs, and results in lower bills for eligible customers.

- b. Customer personas: map 4-7 customers to better understand and segment our customer base by Q2 2022
 - i. Segment by customer class, region as well as common marketing demographics
 - ii. Review segmentation for completeness with OTG
 - c. Develop customer and marketing dashboards in 2021 to better inform 2022-2023 marketing campaigns
 - i. Include data we currently access such as opt-out reasons, call dispositions (reasons for call)
- 2. Increase awareness of VCE brand
 - a. Advertising
 - i. Print, digital
 - ii. Explore radio advertising in English and Spanish
 - b. Word-of-mouth campaigns
 - c. New swag (post-COVID)
 - d. Co-marketing/branding with trusted community partners
 - i. Bigger focus on brand evangelists
 - e. Newsletter: continue to improve content and increase readership
 - f. Increase VCE awareness in primarily Spanish-speaking communities
- 3. Maintain high customer participation rate
 - a. Analysis of regional customer participation rates/opportunities for increased participation in 2021
 - b. Decrease opt-outs due to misinformation
 - i. Residential: introduce more information at time of opt-out (e.g. CARE discount remains the same)
 - ii. More info at time of move-in
 - 1. Work with PG&E to improve language on move-in materials
 - iii. Improve Frequently Asked Questions (FAQs)
 - iv. Social media campaigns, including FAQ Fridays
 - v. Analyze opt-out reason choices given on our online forms and Interactive Voice Response (IVR) phone system to determine whether they should be changed
 - c. Non-res: relationship building to increase retention
 - i. Customers: direct outreach
 - ii. Chambers of Commerce; Farm Bureau
- 4. Emphasize VCE benefits: Local control, more renewables, competitive rates, programs that benefit our customers
 - a. Add tangible benefits copy to website and collateral
 - i. Quantify VCE's, and all California CCAs' gHg emissions reductions
 - ii. Use graphics and analogies so customers better understand, e.g. "this solar project will power the equivalent of 25,000 homes," etc.
 - b. Better understand customer wants/needs around programs
 - i. Develop and administer 1 survey by June 2022; conduct a follow-up in 2023

- ii. Investigate feasibility of programs-specific focus groups and develop a plan by early 2022
- 5. Demonstrate our commitment to customers in disadvantaged communities (DACs)
 - a. Update website annually with resources for customers having trouble paying bills
 - b. Participate in the California Public Utilities Commission's (CPUC's) Arrearage Management Plan (AMP) and formulate marketing and outreach strategy by Q2 2021
 - c. Initiate pilot call-out campaign to customers in arrears in 2021 to offer them assistance with resources such as CARE, FERA, Medical Baseline, and AMP
 - d. Investigate the feasibility of participation in the CPUC's Disadvantaged Communities Green Tariff program (DAC/GT)
 - i. Craft a marketing/outreach strategy to support program participation
 - e. Develop targeted programs outreach for DACs
 - f. Develop targeted educational outreach for DACs
 - g. Enhance communications in Spanish

Metrics

1. Maintain participation rate of no less than 90%
2. Develop and regularly update effective internal dashboards for customer care and marketing
3. Number of improvements made to increase retention

Social Media Campaigns

1. Promote local control
 - a. "Come to our board meetings," "Join the CAC" "You have a say in your electricity," etc.
2. Programs promotion: VCE programs as well as statewide programs like CARE
3. Social media posts in Spanish

Alignment with Strategic Plan

- Objective 3.1: Develop engagement strategies to increase awareness of, and participation in, local control of VCE's energy supply and programs with a particular focus on engaging disadvantaged and historically marginalized communities.
- Objective 3.3: Design and implement a strategy to more effectively engage local business and agricultural customers.
- Objective 3.6: Measure and increase customer satisfaction, using tools such as surveys and focus groups, while maintaining an overall participation rate of no less than 90%.

Goal 2: Establish VCE as a Trusted Community Resource

VCE was formed by the community, for the community. However, we face the challenge that many of our customers do not know they are our customers. We would like to increase VCE's brand recognition within the community, and to build trust with our customers and community partners. We would ultimately like the community to view VCE as a trusted resource in energy matters, from energy efficiency to time-of-use rates. When our customers think of electricity, we

want them to think of VCE – when they have a question about electricity, we want them to come to us first. VCE’s commitment to Environmental Justice (EJ) should also be a concept that the community associates with VCE, and with our branding.

To establish VCE as a trusted community expert, we will need to further display thought leadership and expertise in the field, build deeper partnerships in the community, and continually improve the quality of our collateral, website and social media. In 2021, VCE uses the Twitter and Facebook social media platforms, with slightly different approaches tailored to each platform. By early 2022, VCE will evaluate whether to start and maintain other social media platforms popular with demographics that may not be served as well by our current platforms.

Core Messaging customers receive as a result of Goal 2 tactics and campaigns:

- VCE is an **industry expert** that knows the wants/needs of our community
- VCE is **trustworthy**, local, accessible and credible
- VCE **listens and responds** to my needs, and to the needs of my community

Tactics

1. Revamp website
 - a. Phase 1 (2020-2021, see Green Ideals Outreach Plan 2020)
 - i. Add educational material
 - ii. Ensure accessibility to all customers
 1. Evaluate Americans with Disabilities Act (ADA) compliance
 2. Enhance Spanish materials
 - b. Phase 2 (2021-2022): Website overhaul
 - i. Integrate feedback from the CAC, Board and public
 - ii. Analyze structure, function, color, style and copy
 - iii. Analysis of website traffic pre- and post-overhaul
2. Demonstrate partnerships with allies that are trusted by the community
 - a. Donations to community-based organizations
 - i. One-time
 - ii. Ongoing
 - b. Build relationships on social media
 - i. Like, follow, re-tweet; curate feed quarterly
 - ii. Identify and engage our most influential followers
 1. Increase number of influential followers in 2021-2022
 - iii. Evaluate whether to apply for verified status on social media
3. Demonstrate thought leadership within the industry
 - a. Guest newsletter posts (2/year in 2021)
 - b. Board and CAC pieces in periodicals (2/year in 2021)
 - c. Demonstrate leadership within CalCCA committees
 - i. Participate in 3 multi-CCA initiatives by the end of 2022; publicize
 - d. Host webinars on electricity-related issues (2 by the end of 2022)

- e. Publicize working with PG&E on initiatives, emphasizing our efforts to make such initiatives more customer-friendly
 - i. Joint Rate Mailer (JRM)
 - ii. Time-of-Use transition
- f. Publicize rates
 - i. If alternative VCE rates are developed, craft a marketing and outreach strategy to inform customers
- 4. Events and presentations: (in person post-COVID; via Zoom during COVID) hold or participate in 2/year
 - a. Target demographics:
 - i. Ag customers. Organizations: Farm Bureau, farming non-profit organizations
 - ii. Business customers: Chambers of Commerce, industry organizations
 - iii. Engaged groups: Local climate-focused groups; solar groups; groups promoting building electrification
- 5. Improve collateral
 - a. Net Energy Metering (NEM, 2020-2021)
 - i. Understanding your NEM bill video (rolled out in late 2020); evaluate in late 2021
 - ii. Website text updated bi-annually
 - iii. Sample bill updated annually
 - iv. NEM flier (update in Q1 2022)
 - b. Consider non-traditional collateral (2021-2022)
 - i. Yard signs
 - ii. Posters for local business
 - 1. Promoting UltraGreen, VCE's 100% renewable electricity service
 - 2. Promoting Standard Green (community benefits such as local control, etc.)
 - iii. Point-of-sale collateral: companies can distribute VCE material to show their support and be recognized as a "green business"
 - 1. Could be co-branded
 - c. Customer Programs promotional material
 - i. Website copy
 - ii. Digital and print fliers
 - iii. Improving ability of customers to sign up for programs, e.g. online forms
- 6. Demonstrate our commitment to Environmental Justice (EJ)
 - a. Accessibility: Spanish materials and customer inquiries
 - i. Website: organize more clearly as a community resource
 - ii. Ensure all new collateral is translated into Spanish within 3 months of introducing
 - iii. Analyze satisfaction levels for calls in languages other than English and Spanish through the Contact Center
 - iv. Analyze opt-out rates when customers request a Spanish-speaking customer service representative or Spanish on the IVR phone system

- b. Partner with organizations with an EJ lens (3 partner events/co-written pieces by the end of 2022)
 - i. Social media campaigns and cross-promotion
 - ii. Events
 - iii. Co-authoring
- c. Analyze opt-out and opt-up trends among Spanish-speaking customers by the end of 2021
- d. Increase social media posts in Spanish and set a percentage-based goal for 2022
- 7. Build closer relationships with Commercial & Industrial and Agricultural customers
 - a. Conduct a baseline analysis of current relationships and sentiment among ag customers
 - b. Develop targeted outreach materials
 - c. Add demonstrated impact to collateral (2021-2022)
 - i. Ag-focused programs
 - ii. Advocacy for ag customers (at CPUC, etc.)
 - d. Key Accounts outreach
 - i. Relationship building
 - ii. Avoiding opt-outs
 - iii. Bill/rate analysis support
 - e. Promote VCE as a resource in the time-of-use rates transition

Metrics

- 1. Increase social media following by 50%, or add 250 new followers, in 2021
- 2. Increase website hits and newsletter click-throughs by 25% in 2021
- 3. Support marketing and outreach activities to realize a CARE/FERA enrollment increase of 5% in our service territory by December 2022

Social Media Campaigns

- 1. Educational information
 - a. Energy Efficiency
 - b. Promote thought leadership pieces and speaking engagements
 - c. FAQ Fridays: answer common customer questions and allay misconceptions about CCAs
- 2. Humanize VCE
 - a. Goal: to present VCE as an organization of people who “understand me” and “people I can identify with”
 - b. Voluntary staff, CAC and board photos and personal posts (e.g. staff baking for Thanksgiving, etc.)
 - c. Humor – integrate more fully into voice
 - i. Nuanced, fresh, but not too edgy
 - ii. Target demographic: younger customers who aren’t often engaged in their electricity service

Alignment with Strategic Plan

- Objective 3.4: Build awareness and trust of the VCE brand through direct engagement with customers, communities and organizations in VCE's service territory.
- Objective 5.2: Develop relationships with community stakeholder organizations that foster support for VCE's mission and vision.
- Objective 3.7: Integrate and address the concerns and priorities of emerging and historically marginalized communities in the design and implementation of VCE's services and programs.

Goal 3: Support VCE's Programs Plan and Decarbonization Roadmap

We care about the climate crisis. One of the main drivers in the exponential growth of CCA in California has been decarbonization of the electric grid, and VCE is proud to do our part in ensuring that we lower electricity-related gHg emissions in Yolo County. We would like to further engage the public and private sector (through marketing and outreach) in lowering their emissions. VCE will be developing a Decarbonization Roadmap starting in 2021, and one of the marketing team's key goals will be supporting the marketing and outreach components of the roadmap, which may include aspects of energy efficiency and demand response.

One easy and cost-effective way to reduce emissions is by opting up to UltraGreen. The Marketing team will increase and improve messaging and campaigns that urge customers to opt up to VCE's premium 100% renewable electric service. UltraGreen is an easy way for member communities to make significant progress in their Climate Action Plans, so VCE is committed to working with member communities to make sure they are aware of this option. We know that we cannot do this alone, so a key part of this strategy is to work with our community partners to spread the word and urge customers to opt up. Other CCAs have seen success in their campaigns when they engaged community groups and member communities in opt-up campaigns, and we aim to realize similar success in our campaigns.

Core Messaging - messages customers receive as a result of Goal 3 tactics and campaigns:

- UltraGreen:
 - UltraGreen is the easiest way to **cut my carbon footprint**
 - UltraGreen is **reasonably priced**
 - I'm proud to **do my part** by opting up to UltraGreen
- Decarbonization
 - TBD based on finished Decarbonization Plan

Tactics

1. Support Customer Programs that are working toward decarbonization, energy efficiency and demand response
 - a. Education Component
 - i. In layperson's terms, explain what it is; how it contributes to decarbonization

- b. Action Component: make it easy and accessible for customers to enroll and participate in programs by developing sign-up materials and making online signup possible
 - c. Impact component:
 - i. Devise copy demonstrating: Mitigated X amount of emissions/carbon; equivalent to X (number of cars off the road, etc.)
- 2. Promote UltraGreen: present an easy gHg emissions reduction solution to customers
 - a. Residential:
 - i. Target demographics
 - 1. Customers who want solar but it's not practical or cost-effective for where they live
 - 2. EV owners
 - 3. NEM customers
 - a. Sample messaging: "carbon-free solution for those times when your solar panels are not producing"
 - b. Non-residential: Easiest way to reduce carbon; co-marketing benefits
 - i. Further develop co-marketing benefits
 - 1. Devise strategy in 2021; execute in 2021-2022
 - a. Develop swag
 - b. Develop collateral that businesses can use
 - ii. Target demographics
 - 1. Sustainable businesses
 - 2. Businesses that are seeking green certification
 - 3. New developments (especially in Davis)
- 3. Work with member communities on Climate Action Planning
 - a. As detailed in Strategic Plan, support member agency achievement of energy-sector emissions reduction targets by conducting outreach and building relationships
 - b. Promote UltraGreen as an easy, cost-effective solution
 - i. Finalize process for quickly calculating the added cost of UltraGreen for the customer by the end of 2021
 - c. Determine how VCE can support wider resiliency efforts
- 4. Partner with other organizations on UltraGreen campaigns
 - a. Non-profits
 - b. Member agencies
 - c. Co-branded UltraGreen marketing campaigns

Metrics

- 1. Higher UltraGreen participation rate: increase by 5% by the end of 2022
- 2. Measure and increase programs participation
- 3. Amount of carbon mitigated

Social Media Campaigns

- 1. UltraGreen awareness and Spotlight

2. Boosting resiliency messages online (e.g. battery storage, PSPS preparation, etc.)
3. Green Heroes program; co-marketing benefits
4. Demonstrating partnership with other organizations (non-profits and member communities)

Alignment with Strategic Plan

- Objective 3.1: Develop programs and initiatives to better support community goals, including supporting member agency achievement of energy-sector emissions reduction targets.
- Objective 4.3: Increase participation in VCE's UltraGreen 100% renewable product.

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Appendix A: Green Ideals 2020 Outreach Plan

BACKGROUND

Green Ideals began working with VCE in December 2018. During the past 18 months, we have provided strategic and tactical tools to increase brand awareness and program participation, while trying to keep Opt Outs to a minimum. We have also provided some guidance for damage control, while we've all negotiated PG&E's bankruptcy filing and subsequent PSPS events.

Our goal during this fiscal year (until the end of our contract period) is the continued augmentation of brand awareness and more specifically, the development of positive expectations for VCE in the eyes of all customers—and prospective customers. We'll work to welcome customers from the City of Winters to the VCE family, and to make all electricity customers more aware of VCE's benefits, and of the general benefits of a cleaner environment. It's also important to convey to customers that through their participation in this program, they become part of something that is larger than themselves: a statewide initiative to improve air quality by reducing fossil fuel emissions—leading the way for the country as a whole.

The business, academic and social constraints we're experiencing as a result of COVID-19 and the CDC guidelines for safety mean that the community events and face-to-face interactions we once planned are not possible at this time. More creative channels must be developed, in order to reach out to people and help them feel confident about the positive role VCE plays in their lives. It's also clear that VCE marketing must make specific efforts to be inclusive towards every community segment, working to support social and environmental justice and equity.

The table on the following page offers specific recommendations to do that, along with approximate timing for each. Timing on some of the recommendations must be guided by practical considerations of program development and other factors.

We view this list of ideas as a general guide and will work with the VCE marketing team to augment and build upon it.

Valley Clean Energy | Outreach Recommendations 2020

Task/Idea	Deliverables	Timing
Website - update/refresh	<ul style="list-style-type: none"> • add excitement to HOME page with graphics • add topical news to HOME page • build out dedicated customer pages • reconfigure photos of board and CAC • add TOU pages (res and comm) • add NEM video/revised page text • build out EV and EE sections 	Aug/Sept 2020
General program collateral	<ul style="list-style-type: none"> • yard signs (all over, but especially in Winters) • hanging street banners (Opt Up / Winters enroll) • EV charger signs 	September 2020, ongoing
Green Heroes campaign, cont.	<ul style="list-style-type: none"> • new photos and testimonials from UltraGreen customers • commercial and residential • use on website, newsletter, social media 	October-December 2020
Winters enrollment	<ul style="list-style-type: none"> • Winters brochure - what is CCA and why do I care? • pre- and post-enrollment notices • local newspaper ads • hanging street banner • Mail Chimp reminders • OpEd and earned media releases • 2 digital workshops / digital invitations • Engage local community groups for support with outreach to underserved 	Oct/Nov 2020
COVID-19 assistance	<ul style="list-style-type: none"> • Provide local drive-up or walk-in location for COVID-19 instant testing - or sponsor same at UC Davis (depends on availability and practical concerns) • Publicize through social and traditional media, and on website 	As soon as possible
Opt Up all Yolo municipalities	<ul style="list-style-type: none"> • Engage local community organizations and UC Davis students to create campaign for all municipalities to Opt Up to UltraGreen 	November 2020, ongoing
Videos for social media and website	<ul style="list-style-type: none"> • Create brief videos to share on social media, every 3 weeks • It's so easy to opt up! • How much does UltraGreen cost me each month (how to read my bill)? • Here's our Clean Energy mascot of the month! 	Sept 2020 - ongoing
EV Program Promotion	<ul style="list-style-type: none"> • MailChimp, social media, news releases to announce Yolo EV charger stations • Rent EV with solar panels on the roof to drive around key neighborhoods • Post UC Davis students at each charging station to hand out stickers/clings to users 	Just prior to charging station launch
Earned media outreach	<ul style="list-style-type: none"> • Continue OpEds from Board members every 4-6 weeks or as needed • Davis TV free banner ad • news releases to digital and print • radio and cable TV interviews 	ongoing
Digital Opt Up campaign	<ul style="list-style-type: none"> • General UltraGreen promotion • Google and facebook push 	Spring/Summer 2021