

VALLEY CLEAN ENERGY ALLIANCE

Staff Report - Item 18

TO: Board of Directors

FROM: Mitch Sears, Interim General Manager
Jim Parks, Director of Customer Care and Marketing

SUBJECT: Strategic Marketing & Communications Plan Update

DATE: March 14, 2019

REQUESTED ACTION

Approve the *Valley Clean Energy Strategic Marketing & Communications Plan*

BACKGROUND

As Valley Clean Energy was preparing to serve the residents of Yolo, Woodland and Davis, staff from VCE's marketing/outreach contractor, Circlepoint, developed a marketing and outreach plan focused on start-up activities. This plan guided the outreach efforts at that time—advertising on buses, notifications to customers, facilitating presentations in the community, development of start-up collateral and other outreach initiatives.

With VCE moving to operational mode, and with the hiring of Green Ideals, our new outreach/marketing contractor, it was time to update the marketing plan to focus on day-to-day operations and activities.

UPDATE

The Valley Clean Energy *Strategic Marketing & Communications Plan* was updated through the following process:

- VCE staff updated the existing plan and forwarded it to Green Ideals for input
- Green Ideals staff (Susan) significantly edited the plan and returned it to VCE for review
- VCE staff reviewed the plan, made edits and forwarded the plan to the Outreach Task Group (OTG) of the Community Advisory Committee (CAC)
- The OTG provided comments and these comments were discussed and incorporated into the plan
- The OTG agreed that the plan should be brought to the full CAC, and the CAC should forward a recommendation to the VCE Board of Directors to approve the plan
- The CAC approved the request to recommend approval of the plan by the VCE Board of Directors, with minor modifications, at their February 28 meeting.

The Strategic Marketing and Communications Plan will serve as a foundational roadmap for the implementation of a marketing program that provides participating residents, businesses, key 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, priorities, communications channels, and measurements of success.

The Plan is intended to be a living document that will be assessed and refined as needed. It will evolve with the VCE brand to fit the evolving needs of the brand and its constituents.

The primary goals of the plan are:

- to educate and inform the general public in Davis, Woodland and Yolo County about VCE, and about how electricity and the grid work—so they can better understand the program
- to establish recognition and trustworthiness of VCE among households and businesses
- to promote positive expectations for the VCE brand within VCE's member agencies and beyond
- to illuminate the true cost of energy for people and the planet

Achieving these goals will contribute to general understanding of the program, its values, and its importance in people's lives—and thus to the growth of a successful program with minimal opt-outs. Our aim is not just to be recognized, but also to be so well thought of and trusted that VCE is given the benefit of the doubt throughout its first years, when initial growing pains and actions by PG&E and the CPUC have created a challenge to seamless operations.

The core objectives of this Plan focus on building brand awareness and a deeper understanding of the critical benefits of Community Choice programs in general, and of VCE in particular: local control, effortless tools for the reduction of greenhouse gases, and reinvestment of revenues in participating communities. The Plan also aims to promote and publicize the eventual development of additional programs or sub-products that further these goals, as VCE matures.



VALLEY CLEAN ENERGY

Strategic Marketing & Communications Plan

February 2019

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1. Introduction

Valley Clean Energy Alliance (VCE) is Yolo County's Community Choice Energy (CCE) program that serves as the default electricity service provider to all participating residents, businesses, and agricultural customers in the cities of Davis, Woodland, and unincorporated Yolo County.

As a community-governed, not-for-profit electricity supplier, VCE offers residents and businesses local control of their electricity program, with tools to affordably address climate change that require little or no effort. Customers now have a choice in who sources their electricity, and in the percentage of power that comes from clean sources. Governance of the program is by

designated representatives from the Woodland and Davis city councils and the Yolo County board of supervisors who comprise the VCE Board of Directors. Monthly public meetings are held which the public can attend, and where they can be heard. VCE also has a professional staff, including contract staff from SMUD (the Sacramento Municipal Utility District).

VCE has hired Green Ideals, in collaboration with Media Solutions and Digital Marketing Labs, to develop and manage customer outreach and a marketing, advertising, and communications campaign that will continue to educate, inform, raise awareness and develop loyalty for the VCE brand and its services. In so doing, the program's growing positive reputation may result in an eventual request from nearby communities to participate, helping the program to grow and thrive, and offering economies of scale in both power costs and environmental benefits.

This Strategic Marketing and Communications Plan will serve as a foundational roadmap for the implementation of a marketing program that provides participating residents, businesses, key 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, priorities, communications channels, and measurements of success.

This Plan is intended to be a living document that will be assessed and refined as needed. It will evolve with the VCE brand to fit the evolving needs of the brand and its constituents.

2. Goals and Objectives

The primary goals of the plan are:

- to educate and inform the general public in Davis, Woodland and Yolo County about VCE, and about how electricity and the grid work—so they can better understand the program (and not mistake VCE for a solar company)
- to help customers and the public at large to understand and appreciate the connection between the use of fossil fuels and climate change
- to establish recognition and trustworthiness of VCE among households and businesses
- to promote positive expectations for the VCE brand within VCE's member agencies and beyond
- to illuminate the true cost of energy for people and the planet

Achieving these goals will contribute to general understanding of the program, its values, and its importance in people's lives—and thus to the growth of a successful program with minimal opt-outs. Our aim is not just to be recognized, but also to be viewed as an ally in the fight against climate change, and so well thought of and trusted that VCE is given the benefit of the doubt throughout its first years, when initial growing pains and actions by PG&E and the CPUC have created a challenge to seamless operations.

The core objectives of this Plan focus on building brand awareness and a deeper understanding of the critical benefits of Community Choice programs in general, and of VCE in particular: local control, practical tools for the reduction of greenhouse gases, and reinvestment of revenues in participating communities. The Plan also aims to promote and publicize the eventual development of additional programs or sub-products that further these goals, as VCE matures.

Specific objectives of this Plan include:

1. The provision of clear, accurate, and easily accessible program information to its customers—via website, social media, earned media, collateral and paid advertising
2. Establishment of the brand as a local and trusted source with recognition by residential, commercial and agricultural customers in Yolo County and VCE's member cities
3. Delivery of clear and transparent messaging regarding:
 - a. overarching program benefits
 - b. electricity rates
 - c. legislative and regulatory policies
 - d. specific program offerings
 - e. effects of PG&E and state government policies and decisions
4. Maintaining an opt-out rate below 8% for the standard/default energy product
5. Maximizing the number of opt-ups
6. Strengthening brand awareness of the program and sub-products
7. Promotion of customers' feeling of investment in and ownership of the program, for the benefit of all

3. Key Issues and Challenges

CCE programs create customer choice where none existed before. As such, there are inherent challenges with promoting the VCE program simply due to lack of familiarity with the Community Choice program concept, and sometimes due to more serious concerns and fears. Some of those key barriers to program participation might include:

1. **Lack of Brand Recognition:** VCE is a fairly new program with relatively low brand recognition within the area it serves. The idea of competition for PG&E, which has monopolized the energy market for more than a century, seems unfathomable to some. Establishing the VCE brand, and casting it in a positive light with many local benefits, will continue to be a key challenge.
2. **Lack of Awareness of Program Benefits other than Cost:** Communication efforts should lead with program benefits and why they are of importance—now and for future generations—rather than simply focusing on rates. Selling a concept on price is not a reliable way to develop customer loyalty. Rather, customers must be made aware of the reasons this program is important in their lives.

Recent CPUC rulings (such as increasing PCIA fees) have required the program to eliminate its original rate discount; VCE rates are currently at parity with PG&E. Marketing and outreach should lead with the benefits provided by VCE other than cost reduction—including local control, transparency, choice, sustainability, greater rate consistency, and investment in the community. Customers must be encouraged to embrace the positive effects their participation will have, both locally and on a higher level, and on the fact that VCE offers an effective way to make a difference on climate. Focus should also be placed on programs that VCE may be able to develop in the near

term, such as EV infrastructure development, energy efficiency programs, and the like.

3. **Regulatory Uncertainty:** The uncertainty created by PG&E's bankruptcy filing and CPUC's recent PCIA rulings can leave customers wary about the possibility of future rate increases that are outside VCE's control. VCE must exude consistency and honesty in the face of uncertainty, so that customers are able to assume that VCE "has their backs."

Additional concerns for some electricity customers include:

- **Trust**—*"What's a government agency doing in the electricity business?"*
Outreach efforts must focus on helping constituents understand that Community Choice programs are helping customers take control of a clean energy future—and it's already happening all over the state and nation. Monopolies such as PG&E have recently proven that it's time for a change; taking charge of electricity programs at a local level allows communities to decide for themselves how to manage their power. Focusing on the aspects of *not-for-profit* and *community control* have proven to be key to developing trust and surmounting initial suspicion in other California CCE programs. VCE's participation in local school programs, farmers' markets, community events, fairs, sporting events and other public activities will help it be seen as a trusted local friend. Tabling and presenting at such events will offer an opportunity for one-on-one conversations that are warm and human.
- **Cost**—*"How much more will it cost me to buy greener electricity?"*
Presenting benefits that focus on cost will de-value other brand benefits. Because future cost savings can never be guaranteed, outreach should always lead with the many other program benefits which *can* be guaranteed, while looking issues of cost directly in the eye—even when it's not necessarily to the program's advantage. Honesty 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."*
Helping customers realize that VCE is a valuable tool everyone can use to take action against climate change is key. Our outreach must help customers realize they can be part of something bigger than themselves, igniting a level of social consciousness that makes sense for the participating communities. 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. VCE's opt-up program can also attract customers for whom installing solar PV is not cost effective, but who still wish to "go green."

This Plan addresses these key issues by establishing an overall outreach strategy implemented through specific messaging and actions.

4. Brand Creation

Creating a Brand Story Customers Care About

Green Ideals will promote the VCE brand by creating and telling the VCE brand story, including its emotional nuances, which help the customer understand that the program's values mirror their own. Messaging will educate and inspire, to convey benefits and create a brand experience that builds trust and shows why the program is important in the lives of its customers—and those of their children. Branding efforts will ensure that the look and feel of all VCE messaging and collateral remain consistent throughout the program's multiple communication channels, building recognition. As the brand grows and evolves, branding evolutions will always protect the visual brand equities.

Naming Future Products and Programs (sub-branding)

The creation of sub-brands will differentiate products and programs that may eventually be available through VCE, distinguishing each product as a unique entity within the overarching VCE brand family. An upgraded electricity product name was established prior to launch, with the default product referred to simply as the standard (or default) level, and the upgraded 100% renewable product taking a superlative: UltraGreen. These names offer shorthand identifiers for marketing communication.

UltraGreen, VCE's 100% renewable and 100% carbon-free option, is currently the only sub-branded product in VCE's portfolio. As the program evolves, we expect the need to create logical, easily remembered sub-brands for products and programs that might include Net Energy Metering, Electric Vehicle charging, and more.

5. Target Audiences

The cities of Davis and Woodland, and unincorporated Yolo County contain a diverse population with a variety of cultural backgrounds, ages, education, income levels and social consciousness levels, as well as different residential, commercial, agricultural and industrial sector mixes. In order to establish communication styles and channels which are truly effective, it is essential to define target audiences to help inform key messaging which, while consistent for the brand on an overarching level, must be customized for each segment of that audience. The diverse population creates a variety of motivations for potential VCE customers, ranging from environmental sustainability to economic impact. In many cases, different groups share basic concerns, but each may have its own specific priorities. This Plan maps out the diversity of target audiences as follows:

1. General Residential Customers/PG&E customers: urban, suburban and rural
2. Commercial/industrial/business
3. Agricultural audiences
4. Multicultural audiences (specifically Spanish speakers)
5. Advocates, champions, and early adopters
6. Seniors
7. Solar customers
8. Low income residents

9. City and County Chambers of Commerce
10. Unincorporated areas and neighborhood groups
11. Elected officials and municipal governments
12. Schools – including board members, administrators, teachers and students
13. Neighboring towns, cities and communities (as prospects for program expansion)

Special Considerations: Multicultural Communications and Outreach

VCE has committed to providing support and resources to customers for whom English might be a second language. In Yolo County, approximately 35% of people speak another language at home; 60% of those people speak Spanish in the VCE service territory. Therefore, all early messaging, notices, advertising, and marketing, whether print or digital, have been bi-lingual—in both English and Spanish. Green Ideals will continue to create bi-lingual communications as necessary, though translations will be more than merely word-for-word translations. We will seek to capture the idiom and nuance of the intended messages, earning trust while aiding in customer education.

In addition, Green Ideals will always include English when creating collateral materials for Spanish speakers, giving Limited English Proficient (LEP) and bi-lingual customers the ability to cross-reference information in two languages. This approach is especially valuable to bi-lingual 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 nearly or just as well.

In addition to Spanish-language communication strategies, Green Ideals may also, when needed, employ grassroots engagement tactics to reach the Spanish speaking population in Yolo County. This may involve working with religious and social service institutions to reach these audiences through trusted channels, or engaging the various ethnic chambers of commerce to frame participation in VCE (or upgrading to UltraGreen) 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.

6. Messaging & Tone

The key to success for this brand is in its messaging.

Many products and services sell themselves successfully, at least at first, on the lowest common denominator—lower cost. That only works until a lower-cost competing option appears in the market. Loyalty based solely on price erodes the brand's value and profits.

Our brand will only succeed when its audience realizes that the brand's values mirror their own. They must be urged to think about electricity service, perhaps for the first time ever. And they must be encouraged to realize that there are many unrealized layers of cost associated with fossil fuel-based electricity service, with long-term effects on climate, societies and health. All of this must be conveyed gently but convincingly and without judgment, as we offer our customers

proven tools to improve their lives and ours.

Our brand must strive to convey:

- Hope – It's not too late to do something important about the long-term health of our families and our environment.
- Easy Action – Here are some practical tools that allow me to do something that can really make a difference.
- Moral High Ground – This is the right thing to do for our children and their children.
- Community – Our positive response to this program will support the communities in which we live and work.
- Local Control – This is a program governed right here in Yolo County, and not in a board room and state agency far away.

Foundational messaging for the brand should strive for optimism, social responsibility, local participation and control, community support, family values and future-mindedness. It should focus on people taking charge of their clean energy future, looking science squarely in the eye, but avoid partisan politics. While indicating that VCE is a forward-thinking program that offers multiple benefits to the community and the atmosphere, messaging should never intentionally diminish PG&E, which is both a competitor and partner-provider that supplies a critical service to the program.

It's important that VCE employ language in outreach materials that is somewhat warmer and more human than might be expected from an ordinary utility company. This brand must be seen both as detail-oriented/technically adept and simultaneously friendly. VCE is a company created by the community for the good of the community, so retention of a voice that feels realistic and understanding will help to develop comfort and earn trust. A light-hearted or clever tone, used appropriately, can build a great deal more good will—while being more memorable—than one that's dour or stern.

Upon launch in June 2018, VCE offered cost savings for its standard product, which contained a moderately higher amount of renewable energy than PG&E's standard product. Therefore, cost savings was emphasized in all initial messaging—more to some customer groups than others. The CPUC's October 2018 ruling that increased PCIA fees has necessitated the elimination of that cost benefit as of January 2019. We're now re-prioritizing key messaging to lead with the important benefits of the program that do not involve rate savings. The opportunity at present is to emphasize multiple social, community and climate benefits at *no additional cost* to the customer.

Messaging will always be:

- Inclusive: we—not you
- Optimistic: building a bright future
- Realistic: offering easily accessible tools to make a difference
- Honest: never side-stepping the challenging issues

Foundational Messaging Options:

1. Taking charge of our clean energy future
2. We're powered by people
3. A brighter energy future is in our own hands
4. Communities working together for positive change

5. Tools to address climate change
6. Clean. Green. Affordable.
7. Local benefits at no added cost
8. Personal choice—for the first time ever—in electricity providers

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

Messaging Framework		
Audience	Key Motivations	Preliminary Sub-messages
General Audience/Residential Customers	<ul style="list-style-type: none"> • Environmental health • Reliability • Cost • Local control • Not-for-Profit • Choice • Rate stability • Action tools 	<ul style="list-style-type: none"> • Simple tools to address climate change. • VCE offers clean, affordable energy you can count on. • Let's take charge of our clean energy future. • Clean energy at competitive rates provided by a local not-for-profit, committed to returning value to our communities • The choices we make now impact future generations. Choose clean, renewable energy for a healthier Yolo County.
Agricultural and rural customers/ Unincorporated areas and neighborhood groups	<ul style="list-style-type: none"> • Cost • Reliability • Rate stability • Environmental health • Choice • Local control • Better partner 	<ul style="list-style-type: none"> • VCE offers clean, affordable energy you can count on. • VCE is good for our communities and the local economy. • VCE is a better partner for local agriculture—we're your neighbors. • Community energy means cost competitive rates and local control. • Reducing fossil fuel use will help control the very real and recently experienced impacts of climate change: drought, floods and fire
Champions and early adopters	<ul style="list-style-type: none"> • Leading by example • Environmental health • Local control • Energy efficiency • Moving the state and nation forward on clean energy 	<ul style="list-style-type: none"> • California is leading the way in GHG reduction with CCE programs—now including VCE. • Together we're taking charge of our clean energy future. • Cleaner energy without paying more is just the beginning; VCE will develop additional tools such as energy efficiency programs and EV

	<p>initiatives</p>	<p>infrastructure.</p> <ul style="list-style-type: none"> Your support will help create local, renewable jobs. Our community can exceed our statewide clean energy goals or meet them ahead of schedule.
Seniors	<ul style="list-style-type: none"> Cost Impact on future generations Leading by example Trust Rate stability Environmental health as legacy 	<ul style="list-style-type: none"> VCE offers clean, affordable local energy you can count on. Choice in electricity is good for our economy—It's time we ended energy monopoly and had a choice. Make a difference for future generations who will suffer most from the impacts of climate change. Local control means that our familiar local leaders have our best interests at heart. We're reinvesting in local communities while paying competitive rates and keeping revenues at home.
New Solar NEM customers (those who installed solar panels after June 2018)	<ul style="list-style-type: none"> Cost Choice Environmental health Trust 	<ul style="list-style-type: none"> 100% renewable energy available when I need to buy more than I generate. Harness your solar power for additional savings. You care about the environment—so does VCE. Not everyone can have solar panels. VCE provides clean energy and an opportunity for 100% renewables even to those who can't have them.
Low income residents	<ul style="list-style-type: none"> Cost Retention of CARE/FERA programs Rate stability Health / clean air 	<ul style="list-style-type: none"> VCE's clean energy gives back to our communities, and it's competitively priced. Make the local choice for clean energy at no extra cost. VCE will invest in green energy infrastructure, to create local jobs. Clean energy managed locally means healthier air and communities.
Commercial/industrial/business /chambers of commerce	<ul style="list-style-type: none"> Cost Local control Local jobs / economic re-investment Reducing pollution Reputation among socially conscious customer groups Environmental health 	<ul style="list-style-type: none"> VCE offers a local choice for cost-competitive clean energy your business can rely on. Show your customers and constituents you care about their health and economic vitality. Take charge of our future—power your business with clean energy from VCE. Providing many local benefits, VCE powers Yolo County, Davis and

		<ul style="list-style-type: none"> Continued use of fossil fuels will impact local, national and global economies on a critical level. Woodland businesses with rates that are competitive. When you support clean, local energy, you support economic growth in Yolo County, Davis and Woodland.
Elected officials	<ul style="list-style-type: none"> Serving constituents' needs/desires Local focus Impact on future generations Building local clean energy infrastructure Meeting climate goals set by CA Transparent, open and community engagement 	<ul style="list-style-type: none"> Community Choice is one of the most efficient routes to reduced GHGs and meeting our communities' climate action goals. When you support clean, local energy, you support economic growth in Yolo County. VCE offers easy, competitively priced tools for residents to work towards a clean, sustainable lifestyle. The choices we make now impact future generations. Choose clean energy for a healthier Yolo County. VCE is Yolo County's first and most effective tool in the fight for a cleaner climate and a bright economic future. Our communities will step into a fossil-free future with the help of VCE. If residents have questions or concerns, VCE is here to answer them.
Educators/Students	<ul style="list-style-type: none"> Environmental health Tools for action Local control Not-for-Profit Improving the world for future generations 	<ul style="list-style-type: none"> The choices we make now impact future generations. Choose clean energy for a healthier Yolo County. VCE is Yolo County's first and most effective tool in the fight for a cleaner climate and a bright economic future. Our communities will step into a fossil-free future with the help of VCE. We can all be a part of something larger than ourselves when we join in our local effort to control our clean energy future. VCE will teach us about energy efficiency and help us develop a local clean energy infrastructure. We can take action today for cleaner air tomorrow. WE are the ones who need to act to stop the effects of climate change from becoming even more severe.

PG&E “Legacy” Solar/NEM Customers (not able to enroll at this time)	<ul style="list-style-type: none"> • Cost • Choice • Environmental health • Trust 	<ul style="list-style-type: none"> • Unforeseen program expenses have delayed our ability to enroll customers who were in PG&E’s NEM program prior to VCE’s launch.
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7. Communication Channels

Messaging and public outreach are only effective when the target audiences receive messages to which they can specifically relate. Market segmentation allows us to address a diverse audience with messages from a variety of media through a range of channels. Green Ideals will maximize reach by employing a wide variety of communications channels to raise awareness and enhance brand recognition for VCE.

Green Ideals was brought on board near the end of 2018, just as the CPUC was ruling to increase PCIA, and just prior to PG&E’s bankruptcy filing. The former prompted decisions by the VCE Board of Directors to adjust electricity rates and postpone the NEM program for a year or more; the latter contributed to an atmosphere of general unrest regarding future electricity services. Thus, our attentions between November and mid-February have been focused as much on damage control as on strategic planning and outreach. As we move past these events and the tactical moves they required, our focus will shift to positive reputation building and education, as indicated below.

Circlepoint created many initial outreach pieces for program launch. Some of those require updates in message and tone; other new outreach pieces are recommended as the brand moves forward as shown here:

Media	Materials	Implementation
Program Collateral	<ul style="list-style-type: none"> • Business toolkit • Agricultural toolkit • Animated video • Factsheets • Brochures • Opt up booklets • Poster • Flyers • Banner • Static-cling Window stickers • FAQs • Yard signs • SWAG • PPT slides 	<ul style="list-style-type: none"> • Distribute collateral, brochures, stickers, and yard signs at tabling during community events and through community organizations. • Print collateral will be created in a bi-lingual format. • Distribute/post flyers and postcards in public locations, such as libraries, City/County facilities, senior centers, veteran centers, schools. • Send static cling window stickers to those who opt up as a thank-you. • PPT slides to educate people/students about the positive benefits of VCE.

Website	<ul style="list-style-type: none"> • Redesign for optimism and energy, and for easier navigation • Add features and news • Rates sheets for each customer class • Blog page • Dedicated pages for residential, commercial, agricultural, and special programs • Meeting schedules, agenda, videos • Customer stories (when available) 	<ul style="list-style-type: none"> • Create bi-lingual website content (English and Spanish). • Implement site enhancements including social media integration and a blog. • Add program information that leads with program benefits other than cost. • Redesign original website to include additional features and news with frequent updates, giving viewers a reason to return. • Build out original site for dedicated customer types: residential, commercial, and agricultural.
Email Marketing	<ul style="list-style-type: none"> • Email templates • Content and graphics • Newsletter 	<ul style="list-style-type: none"> • 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. • Develop regularly scheduled email blasts, including Board meeting announcements and key decisions. • Publish program achievements and customer or staff profiles in quarterly newsletter.
Advertising (bi-lingual)	<ul style="list-style-type: none"> • Print • Radio • Transit • Digital • Outdoor • Social media 	<ul style="list-style-type: none"> • Explore digital media push to build awareness, followers and opt-ups. • Participate in relatively low-cost print opportunities to promote VCE, such as the Capay Valley Almond Festival special section and the appropriate festivals that may be planned through the Spring. • Explore cost-effective paid advertising plans to build awareness of the brand and its programs, as budgets allow. • Plan photo shoot of VCE Champions, who can serve as spokespersons for the brand and its importance in their lives/our lives—both on the website and in print advertising.
Social Media	<ul style="list-style-type: none"> • Social media graphics • Editorial content 	<ul style="list-style-type: none"> • Maintain robust schedule of social media posts, including Facebook and twitter, to broadcast news of the program and about electricity and relevant environment issues.

		<ul style="list-style-type: none"> • Create social media editorial calendar one month in advance for client review (both text and image). • Boost specific posts in order to build a friendly following. • Engage via NextDoor.
Events and personal Outreach	<ul style="list-style-type: none"> • Develop list of events, neighborhood, and stakeholder meetings • Attend or sponsor existing community events, such as farmers' markets, sporting events, agricultural events, etc. • Create program Collateral that highlights accomplishments and reasons VCE is important in the lives of Yolo County ratepayers. 	<ul style="list-style-type: none"> • Attend relevant community and stakeholder meetings and events, leading where feasible with Board or CAC reps with ties to the meetings and events. • Use events as an opportunity to distribute informational material, collect input, gather email addresses and have one-on-one conversations with the public. • Capitalize on the skillsets, experience, talent and dedication of the Board and CAC members to support personal outreach. • Engage community organizations to support personal outreach.
Earned media	<ul style="list-style-type: none"> • Press releases • Op-eds and news articles • Ongoing media outreach • Speakers Bureau with Board Members • PSAs 	<ul style="list-style-type: none"> • Generate opportunities for public service announcements and radio interviews at no cost. • Engage local media, specialized media and community bloggers for earned placement. • Develop news alerts and press releases for key milestones, human-interest stories and other unique and interesting aspects of VCE. • Celebrate successes. • Look challenges in the eye. • Conduct outreach to ethnic media.
Call Center Scripting and Office Voicemail Message	<ul style="list-style-type: none"> • Update call center script as needed with program information • Revise office voicemail message to offer human contact first, rather than last 	<ul style="list-style-type: none"> • Update script for call center agents as needed. • Ensure that people who call feel respected, instead of getting the telephone run-around.
On-call tasks	<ul style="list-style-type: none"> • VCE board presentations • Planning calls • Reporting 	<ul style="list-style-type: none"> • Provide VCE board with marketing and outreach updates • Compile regular progress, tracking, and reports of marketing and media work

Ongoing Stakeholder Outreach

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

As budget allows, we plan to develop focused initiatives on specific customer segments, including periodic surveys and studies of key stakeholder groups such as agriculture and business leaders. In the interim, appearances at regularly scheduled meetings (such as the Yolo Farm Bureau or the Davis/Woodland Downtown Business Association Meetings) can offer an opportunity to learn about attitudes towards the VCE program, awareness of its benefits, and to adjust outreach efforts based on these.

Personal Meetings or Phone Calls/Material Distribution

Although initial stakeholder outreach was undoubtedly conducted in pre-launch stages, ongoing contact with these groups will ensure a better understanding of the program and its specific benefits to each group. In-person meetings and conversations will always help to build goodwill, and to develop loyalty. Special care should be taken to address people living outside of urban areas, where initial advertising efforts may have been less robust.

Green Ideals will work with VCE to create a list of community based organizations, agencies and business organizations to target for more personalized outreach.

Media Plan

Communication priorities must be set according to reach and effectiveness, since budget is limited. Therefore, as Green Ideals becomes more familiar with areas of greatest concern—including management of PG&E bankruptcy and CPUC rulings that affect the program—we will develop a detailed and affordable media plan to maximize available resources.

In the interim, our focus will be on the least expensive, most effective options: creation of a more robust and feature-rich website, frequent social media postings, earned media opportunities in print, TV and radio, and sponsorship opportunities in the public eye.

8. Timing / Priorities

Immediate Needs

Green ideals began working with Valley Clean Energy in December 2018, when the visual brand was already well developed. Established messaging led in most cases with rate discounts compared to PG&E, with other important benefits in secondary or tertiary positions. Our first task has been to re-prioritize messaging, putting more substantial program benefits in primary positions. Our planned priorities for marketing outreach and design are:

1. Website revision and expansion (adding visual optimism, useful features, breaking news, and dedicated pages for user groups, programs, etc.)
2. Earned media opportunities, such as OpEds from Board representatives, reminding readers about VCE and the values they share with the brand
3. Build social media following – with interesting news and information about the program and clean energy more generally

4. Organize digital media campaign for UltraGreen awareness/opt up in Spring/early Summer months
5. Create collateral and SWAG for Spring event appearances: static cling window stickers, yard signs, etc.
6. Design UltraGreen (3 Good Reasons) booklet, Fingertip Facts, quarterly newsletter
7. Research best opportunities for Earth Day support/sponsorships
8. Determine schedule for pertinent Spring/Early Summer events that can be sponsored by VCE, and whether materials are needed

As Time & Budgets Permit

With immediate needs met and/or planned for, we can turn our efforts to less time-sensitive outreach materials, including:

1. Planned photography of UltraGreen champions for use in digital and/or print ad campaign, and on website and newsletters
2. Collection of testimonials (some of which correspond to photography above) to publish on website, social media and quarterly newsletter
3. Research local sporting events, festivals, farm days, business fairs at which to table and promote the brand
4. Revisit key stakeholder groups to reacquaint them with the program benefits and attributes
5. Conduct market segmentation studies to assess awareness of program benefits
6. Update targeted collateral for agriculture, business, seniors
7. Design additional collateral pieces to promote products, programs, etc.
8. Negotiate PSA announcements, radio interviews, press interviews with Board members and senior staff to promote the brand and deepen understanding of program benefits
9. Design “at-a-glance” collateral that simply and clearly explains the values and accomplishments of the program to date
10. Research GHG savings realized in Marin when municipalities all opted up, as incentives to present within Yolo County towards a similar end
11. Create additional banners and display pieces to promote UltraGreen and brand benefits
12. Continue to build out and update website pages, focusing on customer stories, EV infrastructure, program expansion and accomplishments, etc.
13. Design paid advertising campaign that features brand champions talking about why they love the program
14. Create a campaign specifically targeted to recapture those who have opted out, simply because they didn’t understand the benefits of the program.
15. Prepare benefits and accomplishments info sheet on a running basis, to help neighboring communities realize why they might want to join VCE

9. Success Measurements

Program effectiveness is measured in a number of ways. Tracking opt-outs and opt-ups is one way. Noting the tone of customer communication, both in writing and at Board Meetings, is another. Engaging people at events to gauge their level of understanding and appreciation for the

program is another.

Here are some measurements that will serve as a barometer for the effectiveness of the outreach campaign, while measuring customer acceptance of the program. Some of these are quantitative; others are more qualitative, offering a look at general perceptions.

1. Residential and business opt-out rates (by community and segment, if possible)
2. Residential and business opt-up rates (by community and segment, if possible)
3. Social media followers
4. Social media conversations, engagement, and viral spread
5. Website traffic, usage, and patterns
6. Email sign-ups and engagement
7. Attendance at meetings and events
8. Advertising reach, impressions, and effectiveness
9. Media coverage and interviews
10. Neighboring community requests to join

Throughout the life of the campaign, Green Ideals will engage in ongoing tracking and evaluation, and will create reports with both detailed and summary information. Tracking and reporting these indicators on a monthly basis will inform the Board of Directors, CAC and/or OTG, and will enable the team to make adjustments to strategies, tactics, and messages during the outreach campaign.