

REVIEW AND COMMENTS ON CIRCLEPOINT'S VCEA STRATEGIC MARKETING AND COMMUNICATIONS PLAN, DRAFT v3

VCEA Advisory Committee Outreach Subcommittee

Introduction. The VCEA Advisory Committee's Outreach Subcommittee met on October 17, 2017 to discuss the draft Circlepoint Strategic Marketing and Communications Plan (referred to as Outreach Plan or Plan in this document). The following summary reflects the comments and suggestions from that meeting. They are not listed in order of priority or importance.

NOTE: Responses in underline.

Staff/Circlepoint have reviewed the Outreach Subcommittee's comments on the Strategic Marketing and Communications. We appreciated the thoroughness and thoughtfulness with which they reviewed the draft document and have provided the below responses in underline outlining how we plan to integrate their insights into the VCE communications program.

General Observation. We recognize that the draft Plan reflects a broad level of strategic outreach and activities. We also recognize that the draft Plan may not include intended detailed implementation strategies or activities. Thus, some of our suggestions and/or comments may already be contemplated by Circlepoint. We appreciate that the Plan is considered a living document that can be updated as new information arises and experience dictates.

1. The Plan continuously refers to "Yolo County" or "within Yolo County." We do not think this is advisable, nor does it accurately describe the VCEA membership. The references need to be clarified to reflect instead the members of VCEA (the cities of Davis and Woodland and unincorporated Yolo County). Also, if VCEA eventually includes members outside of Yolo County, the reference would be incorrect.
 - **This distinction is important. We will update the plan accordingly and will refer to our audience this way in public-facing materials as well. We will also refer to the members of VCE as "member communities" or "customers" and the VCE geography as the "service area", as other CCEs do.**
2. The Plan does not seem to reflect the need to understand and develop distinct messaging for the diverse cultures and audiences within the three member jurisdictions. While all three member agencies have enthusiastically agreed to form VCEA, each has distinct social, political and cultural differences. What may resonate in Davis may not resonate in Woodland, and what may resonate in unincorporated Yolo County may not work as well in Woodland or Davis.
 - **The plan segments VCE messaging by customer demographics and customer classes. We didn't develop city-specific messaging but it's something we can explore based on this feedback.**

3. While it is great that the Plan understands the need to have special outreach to the ag community in unincorporated Yolo County, there needs also to be an understanding and appropriate messaging that reflects where VCEA services may *not* make sense for an ag customer or large industrial and commercial customers in Woodland and/or unincorporated Yolo County. This may be due to existing direct access arrangements or special PG&E rates, such as time of use or interruptible rates that VCEA may not also adopt. This is similar to what Lancaster did for some of its industrial customers.
 - **The tailored materials we're creating for this audience include messaging about direct access arrangements and rate structures. We 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.**

4. For non-English speaking customers, the Plan needs to include information for those other than Spanish-speakers. The Plan should also reflect that some non-English speaking (or limited English speaking) customers may have limited reading abilities (in their native language). Thus, outreach activities through ethnic radio should be planned, as well as through community groups that interact with non-English speaking residents and businesses.
 - **The plan outlines the development of tailored marketing and outreach materials for non-English speaking customers, including the creation of culturally appropriate messaging in-language that will resonate with each audience. We will update this to be more specific about the outreach activities planned to reach non-English speaking customers other than Spanish-speakers, including customers who may have limited reading abilities in their native language.**

5. On page 11 of the draft Plan it lists groups with which VCEA may engage. We suggest other groups in each member jurisdictions with whom to engage and/or outreach to include the following. The full Advisory Committee also can brainstorm about others groups as well.
 - Local environmental groups (i.e., Davis, Woodland Sierra Club; Cool Davis, Audubon)
 - Soroptomists
 - Farm Circle
 - PTAs in all jurisdictions
 - Yolo Energy Watch and participating groups
 - Local apartment associations
 - Local realtor's associations
 - Senior citizen organizations
 - Mobile home associations (both coach owners if they pay electricity and/or park owners for master metered parks)
 - Clergy and congregations, including ecumenical and inter-faith groups
 - Hospitals
 - School districts (not only board members, but school administrators)

- Public and private water districts and/or other government agencies located within the members of VCEA (who would receive service from VCEA and could opt out)
 - ASUCD students who pay their own utility bills (i.e., rent homes)
 - **These groups are valuable additions. In order to engage all of these groups in addition to the organizations listed in the plan, we'll need the volunteer support of VCE advocates and brand champions. The CAC will be included in the upcoming Adocate Training Workshop.**
6. A specific outreach plan should be envisioned for the Yolo County Farm Bureau – not just education materials about VCEA but outreach to engage the ag community early in the process to understand their unique needs and concerns as rates and other issues are developed. There may be other organizations that include ag members, such as cattlemen's associations, organic farmers and small farm operations that could provide input and be interested in learning about VCEA.
 - **We are engaging the Yolo County Farm Bureau to help inform our outreach strategies for the ag community and will update our plan based on their recommendations. In addition, we will look into and reach out to the additional organizations, as suggested.**
 7. The same point applies to local chambers of commerce and downtown business associations in each of the member jurisdictions. Similarly, Hispanic business associations, offer another opportunity to engage the business communities.
 - **The chambers of commerce, downtown business associations, and Hispanic business associations are already included in the plan as key organizations to engage in order to reach the business communities.**
 8. Engaging clergy and congregations (through various inter-faith associations in the three member jurisdictions) provides an opportunity to reach opinion leaders and help provide information about VCEA programs to congregation membership.
 - **Engaging faith-based organizations will be part of our grassroots engagement activities. Per our plan, we intend to reach out to religious and social-service institutions to reach target audiences through trusted channels.**
 9. Testimonials from opinion leaders in all three jurisdictions, from all sorts of different stakeholder groups, offer a good way to provide positive messaging about VCEA and hopefully answer questions residents and businesses may have about the program.
 - **This is a great idea. Please let us know if you have specific opinion leaders in mind for each of the three jurisdictions. We are also collecting testimonials from our photo shoot participants that we will be able to use on materials.**
 10. What, if any, is SMUD's role in outreach activities by Circlepoint? SMUD's expertise in market analysis for VCEA's service territory can be very important. (We notice this is

mentioned in passing in the Plan, but we want to emphasize that we believe this is important.)

- **Circlepoint and SMUD have regular calls regarding where our work products intersect, such as the enrollment forms on the website, the customer call center, and the customer notices. SMUD hasn't done market research within the VCE service territory, but their key account reps are a resource to Circlepoint. Thusfar, they have provided input on messaging and draft materials tailored to the ag community and have offered to review messaging and draft materials for other market segments as well.**

11. In planning the outreach activities, it is important to do so to a wider range of groups than just the ag community. We assume that Circlepoint intends to do so, but the Plan seems light on this. We agree with the importance to engage the ag community; however, we recognize that other groups important to the success of VCEA also need special engagement.

- **The Stakeholder Outreach section of the plan outlines the planned outreach activities of the program. Please let us know if there are other groups that need to be added (beyond what you've included in your responses here) or that need special engagement beyond the presentations and outreach outlined in the plan.**

12. It is important to develop a strategy to work with different stakeholder groups to learn early on what is important to them relative to rates. For example, this could include rate structures for large industrial users, rates for existing solar customers, water users, etc. If the VCEA plan is to ultimately adopt a rate structure that mirrors PG&E's rate structure, that needs to be communicated to existing users. If the rates adopted are different that is important too. And, it may be useful to find out from these groups if there are changes that they would like to see to PG&E rate structures that perhaps VCEA could address.

- **SMUD is working with VCEA staff to determine their recommendations regarding the rate structure. The Yolo County Farm Bureau provided their initial feedback on this topic. As the rate structure details are finalized, Circlepoint will develop messaging regarding the VCE rate structure and how that may impact different customer segments.**

13. How does VCEA impact existing direct access customers? Are they automatically included as customers (who might want to opt-out)? Are they able to switch their contracts to VCEA in the future? Messaging needs to be developed for these customers. (Existing law and regulations cover this, but we wanted to raise it as an observation.)

- **Direct access customers remain direct access customers, so nothing changes with their account. We have created an FAQ related to this for the website and relevant collateral.**

14. By engaging different stakeholders and customers early in the process, VCEA can be prepared to respond to future issues that may be of concern to those stakeholders.

- **Agreed.**
15. It may be useful to explore opportunities for co-branding with stakeholders or customers such as future solar customers/companies, businesses whose own marketing and advertising messages may be enhanced by informing their customers of their use of clean energy provided by VCEA.
 - **Please let us know more about what you have in mind for co-branding. The plan doesn't limit opportunities from happening, if such opportunities arise and are deemed beneficial by VCEA staff and the Board.**
 16. It is important to have messaging related to VCEA's intent to foster and promote local economic development through support of local solar and alternative energy sources.
 - **Yes, this messaging will appear on the website, relevant collateral, and outreach talking points.**
 17. We need to be prepared to offer factual and clear responses to criticisms of VCEA based on incorrect information or other reasons that may arise from different sources.
 - **Yes, this messaging will appear on talking points for anyone representing Valley Clean Energy (e.g. staff, Board Members, advocates).**
 18. We need to be very clear about what is meant by 1% or 3% cost savings (or less than PG&E). That is, we need to be clear that any such reference to savings pertains to generation costs *only* and not the entire bill. We also need to explain that PG&E still charges for its services.
 - **Yes, this messaging will appear on the website, relevant collateral, and outreach talking points.**
 19. We need clear and factual message to explain what the contract with SMUD means. The explanation included in the website FAQs is an excellent response. We think this information could be utilized as part of overall messaging and not just on the website FAQ section.
 - **Yes, this messaging will appear on the updated website.**
 20. It would be beneficial to make it clear in the messaging (and throughout any public engagement activity) that VCEA is a transparent organization that values input from its customers. This could include, for example, plans to hold public forums once or twice a year in each of the member jurisdictions to receive input (and 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).
 - **This messaging will appear on the website, relevant collateral, and outreach talking points. The public forums in each of the member jurisdictions and with different stakeholder groups is beyond Circlepoint's scope of work, but something we can add if approved by VCEA staff and the Board. The level of effort would be determined by the scale and number of the forums.**

21. Consider clarifying that VCEA will be “rate competitive” as opposed to using the term “affordable”, which is a relative term.
 - **Yes, that’s a good distinction. We will clarify that in our messaging.**
22. It is important to emphasize who we are, who comprises the staff and board and the competence of those who are governing, staffing and advising VCEA.
 - **Yes, this messaging will appear on the website, relevant collateral, and outreach talking points.**
23. The term, “For Yolo county, by Yolo county” does not work. VCEA is more than just Yolo County (see comment #1).
 - **Agreed. We will eliminate that message.**
24. In working with the agricultural community, it is important to work with the different segments of the ag community, such as food processing (which is also part of the industrial customer class).
 - **Noted. We will check with the ag organizations and SMUD key account reps regarding their recommendations for the different segments of the ag/industrial customers.**
25. The messaging options on page 6 seem a bit simplistic and more like tag lines. Key messaging for different stakeholder groups needs more depth and meat. We suggest that key messages for different groups should be vetted with those groups before rolling out to make sure the messages hit the mark. SMUD’s market research may have information to help with this.
 - **We are reworking the messaging framework based on this feedback. We are working with SMUD’s key account reps to gather any market insights they are willing to share for each group. They have agreed to provide example collateral/messaging for different market segments as a reference for us.**
26. It would be helpful to prepare information for existing and new solar customers about how VCEA relates to them. This would include information about existing contracts, NEM and future installations. It would be useful to provide this information not only to customers directly but also to the solar industry (i.e., companies and installers who operate in Davis, Woodland and unincorporated Yolo County).
 - **This messaging will appear on the website, relevant collateral, and outreach talking points.**
27. We like the phrase: “Cleaner Energy at Competitive Prices.”
 - **We’ll add this to our messaging framework.**

28. Are there lessons learned from outreach efforts of other CCA's that can help with VCEA's outreach efforts?

- **Yes, we developed our plan based on Circlepoint's experience with other CCAs. For Peninsula Clean Energy, they conducted multi-language focus groups that provided insights regarding messaging, advertising, and outreach strategies for different customer segments. These findings will inform their work for Valley Clean Energy. Leveraging advocates to help with outreach was another successful tactic from PCE that they're employing here.**