

## VALLEY CLEAN ENERGY ALLIANCE

### Staff Report - Item 9

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**TO:** Community Advisory Committee

**FROM:** Rebecca Boyles, Director of Customer Care and Marketing

**SUBJECT:** Review and Recommend that the Board of Directors Adopt the Valley Clean Energy 2021 Strategic Marketing Plan

**DATE:** January 28, 2021

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#### **RECOMMENDATION**

Review the attached 2021 Strategic Marketing Plan and recommend that the Board adopt the Plan.

#### **BACKGROUND**

In 2020, the Valley Clean Energy Board of Directors adopted a Strategic Plan to better guide our organizational mission, vision and strategies. The plan was adopted after significant feedback from the Community Advisory Committee, the Board of Directors, consultants 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 attached draft 2021 Strategic Marketing Plan is meant to complement VCE's Strategic Plan and to give further direction on marketing and outreach strategy. The key goals in the draft Plan for 2021 include:

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

The direction in the draft Plan will help guide the marketing team's campaigns for the calendar year 2021 and will be updated annually. To accompany the Marketing 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.

#### **ATTACHMENT**

1. Draft 2021 Strategic Marketing Plan



**VALLEY**  
CLEAN ENERGY

# Strategic Marketing Plan

January-December 2021



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# 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, 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.

This Strategic Marketing Plan is meant to complement VCE's Strategic Plan and to give further direction with regards to marketing and outreach strategy. The plan will guide the Marketing team's campaigns for the calendar year 2021 and 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.

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

1. Establish VCE as a trusted community resource
2. Increase customer satisfaction and retention
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 in progress, and the plan will be 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 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, with over 51 million impressions made. 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. 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 CCA impact on gHg emissions reductions, new local renewable projects, and the advancement of technologies such as battery storage and demand response programs.

## Goals

### Goal 1: 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. Going further, we would like the community to see 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. To do that, we will need to further display thought leadership and expertise in the field, build deeper partnerships in the community, and continually improve our

collateral and website. VCE's commitment to Environmental Justice (EJ) should be a concept that the community associates with VCE branding.

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

- VCE is an **industry expert** that knows the wants/needs of our community
- VCE is **trustworthy**, accessible and credible
- VCE has my **best interest** at heart

#### 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. 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
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
    - ii. Curate feed quarterly
    - iii. Identify and engage our most influential followers
      1. Increase number of influential followers in 2021-2022
3. Demonstrate thought leadership within the industry
  - a. Guest newsletter posts (1/quarter in 2021)
  - b. Board and CAC pieces in periodicals (1/quarter 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 (1 in 2021; 2 in 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
4. Events and presentations: (post-COVID) hold or participate in 2/year in 2021; 1/quarter in 2022
  - a. Target demographics:
    - i. Ag customers. Organizations: Farm Bureau, farming non-profit organizations
    - ii. Business customers: Chambers of Commerce, industry organizations

- iii. Engaged groups who might help promote UltraGreen: Local climate-focused groups; solar groups; groups promoting building electrification
- 5. Improve collateral
  - a. 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
      - 2. Promoting Standard Green (community benefits such as local control, etc.)
  - 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 (2021-2022)
    - i. Website: organize more clearly as a community resource
    - ii. Translate 3 pieces of Spanish collateral annually
    - iii. Analyze satisfaction levels for calls in languages other than English and Spanish through the Contact Center
  - b. Partner with organizations with an EJ lens (5 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
- 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% in 2021
2. Increase website hits and newsletter click-throughs by 25% in 2021
3. Minimize opt-outs among Spanish-speaking customers: strive to reach retention levels close to English interactions by the end of 2022
4. Realize a CARE/FERA enrollment increase of 10% 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. Voluntary staff, CAC and board photos and personal posts (e.g. staff baking for Thanksgiving, etc.)
  - b. 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 2: 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, the main goal in most of VCE's marketing strategy is to provide information about the choices customers have about their electricity service, and about energy issues in general. The first two years, VCE's marketing and outreach efforts were focused on brand awareness. This will be the natural continuation of that effort, emphasizing VCE's benefit to our communities.

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 emphasizing 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.

Core Messaging - messages customers receive as a result of Goal 2 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. Increase awareness of VCE brand
  - a. Advertising
    - i. Print, digital
    - ii. Explore radio advertising
  - b. Word-of-mouth campaigns
  - c. Swag (post-COVID)
  - d. Co-marketing/branding with trusted community partners
    - i. Bigger focus on brand evangelists
2. Improve analytics and customer data
  - a. Start with the data we have: Salesforce, 4013, load data, Monster Insights, Google analytics, MailChimp
    - i. Request inexpensive data: demographic/census data
  - b. Customer personas: map 4-7 customers to better understand and segment our customer base by the end of 2021
    - i. Feedback from CAC/OTG and Mitch
    - ii. Engage marketing contractors, SMUD
  - c. Develop customer and marketing dashboards in Q2-3 2021 to inform 2022-2023 marketing campaigns
  - d. Improve analytics and report monthly to OTG and Green Ideals
    - i. Report annually to OTG, CAC and Board of Directors in a Year-end Marketing and Customer Care review

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 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 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 CPUC's Arrearage Management Plan (AMP) and promote on our website and social media
  - c. Initiate call-out campaign to customers in arrears to offer them assistance with resources such as CARE, FERA, Medical Baseline and LIHEAP
  - 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 if appropriate
  - 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. Increase social media posts in Spanish by 25% by 2022

3. Develop and regularly update effective internal dashboards for customer care and marketing

#### 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. Spanish social media posts

#### 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 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.

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
  - 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 sign-up 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
  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 10% by the end of 2021
2. Higher programs participation rate: increase by 10% by June 2022
3. Amount of carbon mitigated

## Social Media Campaigns

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