

Establishing a Blueprint for Change: The Marshfield Energy Challenge

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ABSTRACT

This paper describes how NSTAR Electric launched its Marshfield Energy Challenge pilot program by promoting a three-pronged approach to reducing energy use for their residential and commercial customers, utilizing creative community outreach marketing efforts. As NSTAR Electric's marketing and program implementation vendor for the Marshfield Energy Challenge, Conservation Services Group (CSG) has insights to share related to planning, design, and communication. This paper provides tips for building effective community-based marketing campaigns and explains why close collaboration among industry partners, community influencers, and the marketing vendor is crucial to such a campaign's success.

We will highlight the advantages of using a community and partnership approach, and ways you can achieve significant results in similar campaigns. We will show sample marketing materials, and provide relevant statistics.

Introduction

NSTAR Electric in 2008 launched a high-profile campaign to lower peak demand in the town of Marshfield, Massachusetts in order to mitigate distribution system congestion. This pilot program focuses on the combined benefits of energy efficiency, demand response, and renewable generation. It has manifested dramatically positive results in its first year due primarily to successful marketing efforts using the appealing Marshfield Energy Challenge name and logo with a memorable tagline: "It's about where we live, work, and play." According to a May 2008 *Boston Business Journal* article, the pilot's ambitious goal is "to establish a blueprint to minimize the state's energy usage."

Coordinating partnerships among various players such as community "ambassadors," the many homeowners and business owners, three different program delivery vendors, the school system, local politicians and a bank, and with funding from the Massachusetts Technology Collaborative's (MTC) Renewable Energy Trust dedicated to the solar photovoltaic installations, NSTAR is making this program work within budget, while securing the desired energy savings.

Essentially, NSTAR Electric has utilized a cost-effective, integrated and results-oriented community campaign with a partnership approach to achieve excellent response, in a time when business owners and consumers are bombarded daily with much superfluous information. In general, the approach used for the Marshfield Energy Challenge is to offer incentives to homeowners and businesses through a combination of community-based outreach and more conventional marketing. Note: The pilot piggybacks on the current statewide MassSAVE utility program, with additional features and benefits.¹

Marshfield Energy Challenge organizational roles are:

- NSTAR Electric is the primary sponsor and "driver"
- CSG is marketing arm and implementer of residential measures (and also supplies tracking, reporting, and measurement and verification services)

¹ MassSAVE is the Residential Conservation Services Program, financed and operated under regulation of the Massachusetts Department of Public Utilities and the Massachusetts Department of Energy Resources. Designed to save consumers money, improve the energy performance of homes, and reduce air pollution, MassSAVE is operated by local electric and gas utilities and energy efficiency service providers.

- RISE Engineering implements the commercial measures
- groSolar is the official installer of rooftop PV on homes and businesses

Close collaboration by all parties along with the MTC's Renewable Energy Trust is key to the Marshfield Energy Challenge's success.

Although this paper will discuss Planning, Design, and Communication in a linear sequence, it is important to realize that the three aspects of the process are more properly viewed as an integrated whole, as they are simultaneously operating components.

1. Planning

Planning for marketing efforts began with NSTAR and the MTC seeking help with their "Utility Congestion Relief Pilot" in 2007. They stated: "MTC and NSTAR seek to demonstrate that renewable energy, when incorporated with customer-side demand response and energy efficiency projects and improved communication and control, can relieve congestion or constraints in the electricity distribution system while simultaneously providing economic benefits to utilities and electricity customers."

From this initial step—stating a demonstration goal—a "weaving together" process has occurred. Early on, the team realized that even though relief for specific congested circuits was ultimately the targeted goal, it was advisable to bring the entire town of Marshfield into the campaign. This would foster a team spirit approach that involved citizenry and business owners. It was decided to position the pilot as an exciting opportunity to increase awareness and participation in the MassSAVE energy efficiency program, direct load control and renewable energy services within the total pilot geography. Targeting the entire Marshfield service area provides broad based community support for NSTAR energy efficiency and renewable energy programs, identifies NSTAR as a leader in this arena, and positions Marshfield as a community model.

Planning for the pilot involved, among other tasks: naming the program, creating a budget, drawing up timelines, and selecting a tactical team. The team then decided on a "soft launch" date, when the community ambassadors would be brought in via invitation, to be followed by a more public, "hard launch" date when program marketing would be ramped up to the extent possible given budget parameters. Initial brainstorming of a lengthy list of possibilities for raising awareness about the pilot led in turn to a more refined list and the program partners agreed to focus on the most strategically effective opportunities.

The team introduced the possibility of a reward which would benefit the entire town at no cost to Marshfield, if a "town goal" can be achieved. Following a community-wide and team discussion early in the process, it was determined that the reward should be PV installation on a public building or buildings. This would provide a high value result for the townspeople pulling together and stretching to complete a challenge while also providing a visible indicator of the progress made. Specifically:

- the reward will have value, visibility, and validity—validity in the sense that the reward is aligned with the theme of the Challenge
- 7.5 kW of solar panels are valued at about \$75,000
- the panels will generate about 9000 kWh of clean electricity annually for decades to come
- at current electric prices, the panels will save the town about \$1,800 per year

Panels might be installed at the police station and the Middle School. The police station roof is highly visible to the community. The Middle School presents educational opportunities, although the panels would not be visible from the ground. Educational access would be through curriculum and instrumentation so that the performance of the units could be monitored by students. The story of the panels and the town's progress toward its goals might be included in publicity and/or as a gentle prod to encourage participation.

Coordinate the Partnerships

Offering a two day community meeting was key in laying the groundwork with partners. This opportunity for all parties including local stakeholders was held early on as part of the “soft launch” of the program. Upbeat language was used in an “ambassador” invitation, designed to help local thought leaders realize how much of a positive impact they could have on their community through helping with the Marshfield Energy Challenge efforts. This campaign tapped into pre-existing social networks and focused outreach efforts on enlisting influential leaders throughout Marshfield. The team sought leaders who appeal to a diverse set of audiences. It was hoped that the community leaders would be willing to deliver the Marshfield pilot message to their constituencies and commit to getting a MassSAVE audit/assessment at their home or a small commercial audit at their business. By involving local leaders, NSTAR garnered credibility, visibility and success stories that helped to lay the groundwork for effective neighbor-to-neighbor and business-to-business outreach. This particular approach was pivotal to the final scope of work being defined and finalized.

The overall messaging articulated why NSTAR and the MTC chose Marshfield and focused on a community initiative to lower costs for all customers by improving the distribution system reliability through saving energy. As one example of the charrette meeting process and outcome, the “ambassador” community leaders helped to choose the final program logo during this event. They also posed questions and thoughtfully raised issues that helped to inform the pilot. On-the-side discussions among supportive community leaders also were valuable in testing campaign design ideas.

Integrate the Approach

The program used a two-tiered approach. The first tier or “umbrella” message to all residents and businesses in Marshfield was to join a community-wide pact to reduce energy usage. This was accomplished through traditional media outlets, direct mail, and community awareness building. The second was a more targeted outreach to the Marshfield residents and businesses located on the affected circuits representing approximately 60% of the Marshfield population. Using data mining techniques, within the group of customers served by the constrained circuits the marketing effort paid special attention to customers whose use profile indicates that they are above average contributors to system peak.

The strategic marketing vehicles and community-based outreach initiatives employed in 2008 are described below. Overall consistency in design and communication messaging improved the effectiveness of all these initiatives.

Advertising. A media schedule was developed early on, to include print and radio advertising. The local weekly newspaper, the *Marshfield Mariner* was the obvious choice of vehicle. “Teaser ads” ran early in 2008 to set the stage and pique readers’ curiosity. These were followed by more fully informative “content ads” a few weeks later. The schedule included enough frequency to garner attention (alternating weeks, at one point in the campaign), with generous display size of full page and half page. A radio spot was aired on WATD, the local radio station owned by a community leader.

Earned Media. Before NSTAR’s official press release was available, local journalists learned of the Marshfield Energy Challenge and the *Marshfield Mariner* ran an article on February 26 that included NSTAR commenting on the pilot. Once NSTAR’s press release appeared in April, it was followed by a series of articles in a spurt of media attention. These included a *Mariner* article “Selectmen approve formation of energy committee” and a *Boston Business Journal* article “Energy pilot program to test if efficiency is enough,” both appearing in May 2008. Later on after the program had appeared in the town’s schools, an article ran in another local newspaper, the *Patriot Ledger*, entitled “NSTAR presentations teach

pupils to be frugal with electricity.” The *Boston Globe South* ran three articles, and the *Boston Herald* ran one. Additional media that picked up the overall program story included WBZ radio, New England Cable News (NECN) and WCVB-TV NewsCenter 5 (which ran their story four times).

Internet Presence. News outlets mentioned under “Earned Media” ran online versions of their articles and features.² NECN’s video, which shows solar panels being installed on a Marshfield home, was titled “Mass Town Turns Into Hotbed of Clean Energy,” and WCVB’s feature was “Town, NSTAR Join Forces to Conserve.” Around the time NSTAR authored its press release, the utility created a web page at www.nstar.com/marshfield that displays the program logo and offers various related information. The “Community Pages” at the independent website www.marshfield.net links to NSTAR’s web page, with its page devoted to the Marshfield Energy Challenge. The program also has made occasional appearances on www.townofmarshfield.org (the “official” town website) as well as on a Forum page at the independent site.

Community Outreach. The NSTAR/CSG team, supported by about a dozen community ambassadors, brought awareness to the community through a variety of initiatives including events, sponsorships, exhibits and informational sessions. A few examples of the events were:

- Chamber of Commerce Special Meeting (June): Refreshments and a presentation focused on how the Marshfield Energy Challenge can help businesses
- The Summer Concert and Entertainment Series on the Town Green (July)
- Marshfield Fair (August): Featuring NSTAR’s mobile energy efficiency demonstration
- “Greening Up Your Home and Business” presentations at Massachusetts Audubon’s North River Wildlife Sanctuary (multiple months): Learn about energy efficiency and solar technology

Another aspect of the community awareness building was to go into the Marshfield Public Schools. The schools are a major channel to homeowners and NSTAR worked with school department officials to develop ways of educating children and their families about their home energy use, with the goal of enrolling parents in the program. NSTAR presented two shows, “The Magic of Saving Power” and “Energy Pursuit,” at two Marshfield elementary schools. Local bank partner Rockland Trust displayed an educational program poster and offered Marshfield Energy Challenge fact sheets for its patrons. Additionally, program sponsorship of the North River Arts Society festival with program book advertising, and presence at the Farmers’ Market was secured with distribution of canvas bags emblazoned with the program logo. Each community ambassador received a package with a personal letter, Marshfield Energy Challenge premium ball cap, tote bag, and static cling decal.

Collateral and Support Materials. To gain maximum exposure, a strong campaign needs to include coordinated materials with an attractive, consistent “look and feel.” The Marshfield Energy Challenge direct mailers, fact sheets, and other items achieved prime visibility with this integrated look, while NSTAR also sent 11,000+ bill messages on customers’ utility bills for additional impact. In addition to the tagline “It’s about where we live, work, and play,” messaging carried the theme through to emphasize, “It’s all about Marshfield.” These materials offered homeowners and business owners an opportunity to join together and discover ways they can make a positive impact.

- Direct mail—In early May, 2008 the colorful postcard was sent to 11,092 recipients. The following week, 104 callers contacted the dedicated toll-free number to inquire about the program and how they could get involved. This mailing outlined incentives and encouraged home assessments to

² www.necn.com/Boston/Business/Mass-town-turns-into-hotbed-of-clean-energy/1221173953.html and www.thebostonchannel.com/news/17025537/detail.html

determine program eligibility, including opportunities for PV installation. Specifically, the postcard included this information:

- *Program offerings and significant rebates include:*
 - 50% off insulation and air sealing upgrades
 - 0% financing up to \$10,000
 - Up to \$1,000 rebate for a high efficiency heating system
 - \$300 rebate for a high efficiency hot water heater
 - ENERGY STAR® replacement window & refrigerator rebates
 - Significant incentives for solar electric (PV) panels
 - Additional money saving offers for residences with central A/C
- Fact Sheets—Two fact sheets were developed for particular program components—one for solar PV with solid, general information about how a PV system works as well as more specific program-oriented information; the other for the Central Air Conditioning package that included the sub-head “Working to make the most of your air conditioning” and included a description of how the Smart Thermostat works. Field staff distributed these as leave-behinds, as well as making them available at events and meetings. They proved valuable in helping to address some of the frequently asked questions, while educating townspeople about more details of the program.
 - Central AC targeted letter—During the height of the summer season when air conditioning was more likely to be a focus of daily life, NSTAR sent a letter targeted to 1,054 high use customers. Mailed on July 2, 2008, the letter garnered 142 calls (a 13% response rate) in the first 30 days. With a general upbeat tone, it included not only the general program offer but also the following key information:
 - When you participate in the Marshfield Energy Challenge, you can take advantage of our Central Air Conditioning Package to improve your home’s cooling efficiency. This service is being offered free of charge and will provide you and your family the following benefits
 - Free insulation upgrades — the insulation levels in your attic, wall and floor cavities are brought to current standards where possible so that your cooling and heating costs can be reduced
 - Free air sealing upgrades — your home’s outside air infiltration rate is evaluated and when appropriate, the leaks are sealed
 - Free comprehensive air conditioning tune-up — optimizes your air-conditioner’s efficiency to provide maximum cooling with minimum energy use
 - Free Smart Thermostat — an advanced thermostat that maximizes the cooling efficiency of your home and contributes to the reduction of community energy use
 - Rockland Trust poster—The team partnered with this local bank who offered low-interest loans to Marshfield Energy Challenge participants, in addition to providing Point-of-Purchase display materials to raise awareness of the program among bank patrons.
 - Bill messages—the following messages were included in NSTAR customer billing for the month of May 2008:

<i>Marshfield - Residential</i>
How much LOWER can THIS BILL go? Find out: Join the Marshfield Energy Challenge. Call 866-626-4693 today or visit www.nstar.com/marshfield IT'S ABOUT WHERE WE LIVE, WORK AND PLAY.

Marshfield - Business

How much LOWER can THIS BILL go?
Create a whole new way to think about energy:
Join the Marshfield Energy Challenge.
SAVE MONEY, HELP THE ENVIRONMENT
Call 866-626-4693 today or visit www.nstar.com/marshfield

2. Design

A successful campaign design begins with good planning and development. Key to this process was a focus on the aspirational qualities of this pilot program. With the potential for program success in mind, this great design more naturally followed. Incorporated into each designed campaign element is the consideration of tracking mechanisms to enable measurement of its effectiveness.

Program Logo



Campaign Look and Feel

The integrated “look and feel” of the campaign originated with a strategic approach that informed design work, and overall trajectory as additional collateral pieces were added. Early on in the process (2007) the team knew that a primary goal was to rally community participation and pride, encouraging every Marshfield resident and business owner to reduce energy usage to help lower environmental impact. The chosen theme evokes social responsibility and motivates action, and the strong, direct and clear call to action is a key part of every campaign element. The direct mail postcard is shown here. Web banner, print advertisements, and all program collateral have a related, integrated look and feel.





It's all about Marshfield.

Join the Marshfield Energy Challenge today and see how YOU can make an impact... at home and in your town. It's all about where we *Live, Work and Play.*

Program offerings and significant rebates include:

- 50% off insulation and air sealing upgrades*
- 0% financing up to \$10,000
- Up to \$1,000 rebate for a high efficiency heating system
- \$300 rebate for a high efficiency hot water heater
- ENERGY STAR® replacement window & refrigerator rebates
- Significant incentives for solar electric (PV) panels
- Additional money saving offers for residences with central A/C

Join us today and contribute to a better Marshfield!




*Up to \$1,000. Customers with limited income are eligible for free services; rebates will be made to local agencies. Financing offer is contingent on being approved for a loan from a participating lender. Rebates and financing are subject to funding availability and subject to change or cancellation without notice.

Call **1-866-626-4693** to find out more about the Marshfield Energy Challenge.

3. Communication

First and foremost, the goal of communication is to move forward in such a way as to bring success to the program. Communication involves both internal and external opportunities and vehicles. The program partners communicate between and among themselves; the program communicates to the larger audiences of Marshfield's NSTAR customers, and beyond. Outreach involves targeting all the people who live and work in Marshfield, including schoolchildren. Shown here are a few of the fun stickers that were distributed to encourage kids to get the adults in their sphere of influence on board with the program:



Implementation Partners: Key to Success

Frequent internal communication among team members is an essential component to the success of the Marshfield Energy Challenge pilot program. In addition to utilizing e-mails, a web-based tool ("extranet") was established early on, allowing an easy way to collaborate, manage and track the rapidly-evolving project, and post files in a central area for view. The extranet is a reliable and convenient tool for communicating powerfully, is transparent to the 30+ team members allowing free flow of information, and provides an historical archive of the entire project process. This strategy is indispensable especially at times when changes and developments are proceeding at a rapid pace.

Ambassador Updates

Once the local thought leaders were signed on to the program, monthly e-mail blasts were sent by NSTAR team members in 2008 to keep these ambassadors up-to speed on marketing and production numbers. These emails will also be essential to 2009 initiatives. Additionally, the ambassadors were sent a letter and package of program materials (referred to above) to keep the Marshfield Energy Challenge in their top-of mind awareness and encourage them to reach out to friends, acquaintances and neighbors to increase program participation.

Marshfield and Beyond

In essence, the team has focused on implementing targeted communication vehicles to solicit customer participation along with supporting general awareness and momentum-building activities. While the campaign approach is based on home, family, and “Marshfield spirit,” it also contains a nod to widening one’s care to include that of a broader constituency.

The letter to homeowners with central air conditioning included the following inspirational words and call to action: “NSTAR believes Marshfield can make this energy reduction goal a success by working together as a community and we would like you to be a part of this exciting initiative and help your community strive for a better tomorrow. When you save energy, your community saves energy! So we welcome you to spread the word to your friends, neighbors and acquaintances. With your participation, Marshfield will become an even better community for present and future generations to *Live, Work and Play*. To find out more about this program, please call 1-866-626-4693. Thank you!”

Some common themes explored in this campaign that can be generalized to similar campaigns in other regions are:

- By working together, we can make a real difference in our community and the environment
- Every home, every business can reduce its energy consumption and carbon footprint
- Small town answers can help solve big world problems

Results/Conclusions

Multiple measurement points will determine the ultimate Marshfield Energy Challenge program and its marketing success. Among them are:

1. Customer Contact Center call volume, tracked/reported by marketing campaign component.
2. Participation in residential program, tracked by CSG.
3. Participation in commercial program, tracked by RISE.
4. Post-campaign qualitative market research through telephone surveys, conducted by Opinion Dynamics.
5. Post-campaign energy savings analysis, conducted by NSTAR.

The Marshfield Energy Challenge program succeeded in its first year due in large part to a partnership approach. Included in the January 2009 conference presentation is an updated graph that shows how the 2008 marketing efforts correlate with calls received and number of audits. This is one of many possible analyses.

In conclusion, the Marshfield Energy Challenge program is based on the idea that communities, when given the information and tools, can and will make positive changes to their energy usage. Therefore, this pilot offers an exciting opportunity to reach into other areas. The key communication methods and message could be very similar, but the target audience demographics and media vehicles would vary depending on geographic region. The opportunity is to use this pilot as a template – to learn from it, refine it

and then to tailor as necessary to meet the specific needs of other communities within and beyond NSTAR's service territory. CSG hopes that by providing this information, we can help other such implementation efforts nationwide to be more successful.