

# Replicating Marshfield's Success: "If You Build It, They Will Come"

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## ABSTRACT

This paper describes how to gain expertise on replicating a successful community-based marketing campaign, from your first pitch to the winning home run. Learn how NSTAR Electric concluded its Marshfield Energy Challenge pilot program in 2009, utilizing targeted marketing for a strong finish and providing both NSTAR Electric and the community with participation rates that exceeded initial expectations.

In 2008 NSTAR Electric launched a high-profile campaign to lower peak demand in the town of Marshfield, Massachusetts. Program partners raised awareness about the combined benefits of energy efficiency, demand response, and renewable generation using accessible language that invited townspeople into the program: *"It's about where you live, work and play."* Residential and commercial customers were all eligible to participate. Marshfield Energy Challenge-related advertising in the town newspaper piqued customer interest by asking: "What does energy mean to you?"

In Phase Two of the pilot, NSTAR Electric built on the foundation of its integrated community campaign by using the more highly targeted approach of personal letters. As a result, the program audit goal was easily surpassed, measure installation goals were met overall, and PV (renewable generation) goals were exceeded well ahead of schedule. At the program's conclusion, additional benefits expanded the field of energy savings: Solar panels were installed on town buildings for ongoing visibility and yet more energy savings, and the Marshfield Energy Challenge branding and identity were gifted to the town's newly-formed Energy Committee enabling them to modify the program and make it their own.

Elements of this program were highly successful. Utilities can partner with vendors and community organizations to create a uniquely-branded version of the Marshfield Energy Challenge in a town or municipality. Social media tools and smart meter benefits and online tools can be folded into new versions. As the marketing vendor for this initiative, Conservation Services Group has insights to share with the AESP audience related to strategic planning, design, communication, and "after-marketing" follow-up.

## Introduction/Background

Setting the stage for success, NSTAR coordinated partnerships among various players such as community leaders ("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.

The approach used for the Marshfield Energy Challenge was to offer incentives to homeowners and businesses through a combination of community-based outreach and more conventional marketing. The pilot piggybacked on the statewide MassSAVE utility program, with additional features and benefits for homeowners.<sup>1</sup> RISE Engineering utilized campaign branding to approach business owners.

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<sup>1</sup> 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,

The pilot was designed to explore a shift in focus away from the traditional means of meeting growing demand (building new power plants, upgrading substations) to a new way of doing more with less. A primary objective was to ascertain the effectiveness of deploying a community-based, high profile marketing campaign to achieve lower peak demand on an affected electric distribution circuit. Marshfield was chosen not only for the situation with its circuit, but also for its demographics (relatively high income and education levels) and likely attitude of caring and cooperation.

Creating, supporting, and implementing the Marshfield Energy Challenge were these organizations in the following roles:

- NSTAR Electric - primary sponsor and “driver”
- Massachusetts Technology Collaborative’s (MTC) Renewable Energy Trust (the state’s renewable energy development agency) - cosponsor
- CSG - marketing arm and implementer of residential measures (also supplier of tracking, reporting, and measurement and verification services)
- RISE Engineering - implementer of commercial measures
- groSolar - installer of rooftop PV on homes and businesses

Close collaboration by all parties was key to the Marshfield Energy Challenge’s success in creating a new tool to manage electric load growth and its impact on infrastructure.

### **Phase One: 2008**

From mid-2007 throughout early 2008, the bases were loaded for success due to careful planning by the entire team; by mid-2008 all indications showed that the program was a winner. By year-end, 646 completed audits, 234 kW of installed measures, and 181 PV leads resulted. About seven percent of the nearly ten thousand single-family, 775 multifamily, and 347 low-income NSTAR customers requested and received energy audits in 2008. A paper delivered at the January 2009 AESP National Energy Services Conference provides detailed specifics about Phase One of the Marshfield Energy Challenge. Topics covered include: coordinating the partnerships for best success; the visual design and program branding process; best practices for communication among implementation partners and community leaders/ambassadors; and integrating the campaign approach through advertising, earned media, internet presence, community outreach and use of collateral and support materials given a modest marketing budget (paper available from AESP or Kathleen DeVito).

### **Phase Two: 2009**

The primary strategy of Phase Two was increasingly targeted communication to NSTAR Electric on-circuit customers. This communication was primarily via letters mailed to customers, but also in an April bill message, in local print media, and in a continued Internet presence. Receiving the direct mail prompted customers to call and inquire about the program, as evidenced by a correlation shown in the “Phase Two Results” below. As the program sign-up opportunity ended June 1, 2009 a concluding event was planned to help ensure that program momentum would more easily translate into savings beyond the pilot’s 2009 end date.

## **Building Momentum**

Word of mouth and earned media in 2009 were leveraged by NSTAR to strengthen the program. About a dozen local thought leaders (“ambassadors”) who signed on to the program in 2008 were updated with monthly e-mail blasts sent by NSTAR team members in 2009 to keep the program in the forefront of their consciousness. Monthly marketing and production numbers and other information was provided to encourage the ambassadors to continue with program promotion. This communication continued a pattern and frequency begun in 2008, reinforcing the strength of local leverage. The NSTAR/CSG team, supported by the ambassadors, continued to bring awareness to the community through a variety of initiatives including events, sponsorships, exhibits and informational sessions.

A news story circulated by the Associated Press on May 17, 2009 (“Marshfield serves as NStar test bed for green energy: Incentives aimed at easing strain on the power grid”) brought national attention to the Marshfield Energy Challenge, citing successful residential PV and other measure installations and happy homeowners. The story was picked up by major news outlets as far away as Winston-Salem, NC and San Diego, CA. Added to the earned media in 2008, this considerable body of very positive media exposure is a key part of enabling program replicability elsewhere in the U.S.

## **Direct mail campaign**

Letters were strategically mailed to various Marshfield audiences during the months of March and May, comprising the single most influential piece of the Phase Two campaign. All letters clearly spelled out that the offer to participate is a “special offer only available to Marshfield residents and is set to expire soon” so that customers could take advantage of the maximum incentives and rebates offered by NSTAR Electric. The campaign consisted of:

- First drop (March 09) (4.4% return)
  - Sent to homeowners on-circuit, with central A/C:
    - Letter 1 target–audit performed; no measure installations yet by customer
    - Letter 2 target–audit performed; insulation already installed but no central A/C package measures yet provided
    - Letter 3 target–no audit yet performed
- Second drop (May 09)
  - Target–Additional homeowners on-circuit, with central A/C / no audit yet performed
  - 888 pieces dropped, 47 audits (5.3% return)
- Third drop (May 09)
  - Target–Remaining homeowners on circuit with no audit yet performed
  - 3370 pieces dropped, 175 audits (5.2% return)

A sample letter is shown below.



One NSTAR Way  
Westwood, Massachusetts 02090

Dear Kathleen

For the past few months, NSTAR Electric has been reaching out to you about the Marshfield Energy Challenge. We would like to have your participation in this program to help us make a difference in reducing energy consumption for your home and in your town! By signing up for an energy assessment, you will take the first step towards saving money for your family, improving the energy efficiency of your home, and making a contribution to the environment.

As an owner of central air conditioning, you can take advantage of our **Central Air Conditioning Package** to help reduce your electric bill and assist the community in managing its energy need. This service is a special offer only available to Marshfield residents **free of charge** and is set to expire soon. For more information about the program or how to sign up, please call us at **1-866-626-4693** by **June 1, 2009**.

The Central Air Conditioning Package includes the following services with the installation of a Smart Thermostat:

- **Wall, Attic, and Floor 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.
- **Air Sealing Upgrades** – Your home's outside air infiltration rate is evaluated and when appropriate, the leaks are sealed.
- **Air Conditioning Tune-Up (a \$165 value)** – Your air conditioner is optimized to provide maximum cooling efficiency with minimum energy use for units over a year old.
- **Smart Thermostat (a \$300 value)** – An advanced thermostat is installed to maximize the cooling efficiency of your home and contribute to the reduction of community energy use.

The Marshfield community has come a long way in reducing energy usage and costs. With your support in the Marshfield Energy Challenge, the energy reduction goal will become a reality. Your participation will make Marshfield an even better community for present and future generations to *Live, Work and Play*. We look forward to hearing from you soon. Thank you!

Sincerely,

*Dennis Galvan*

Manager, Community Relations and Economic Development  
NSTAR Electric & Gas Corporation

## Print ad

A half page ad in the *Marshfield Mariner* (shown below) brought additional visibility to the program during Phase Two. Insertion dates were 4/15/09, 5/6/09, and 5/27/09. The lively ad design and images of community mimicked the look and feel of 2008 Marshfield Energy Challenge direct mail postcard and *Mariner* ads that bore “broader-brush” introductory messages, and was modified to specifically alert readers to the fact that program sign-up opportunities would end in June and that they needed to take action soon.



## Energy savings start where we **LIVE, WORK, & PLAY.**



Program is coming to a close soon. Join now to save money and energy. Schedule a home energy assessment by **June 1, 2009**.

### Residential program offerings:

- 75% off, up to \$2,000 for insulation and air sealing
- Special A/C incentives
- Incentives for solar electric (PV) panels
- Up to \$1,000 on high efficiency heating equipment
- Up to \$300 on high efficiency hot water heaters
- ENERGY STAR® replacement windows & refrigerator

Your community and the environment will benefit by reducing your energy consumption.

If you are a Marshfield business owner, please contact us about our commercial incentives.



Rebates are subject to funding availability, and, are subject to change or cancellation without notice. Customers with limited incomes are eligible for free services, referrals will be made to local agencies.

Please call **1-866-626-4693** for more information or to schedule an appointment.

## Bill Message

A message on the front page of customers' April bill brought the program deadline to their attention:

<b>Marshfield</b>
Join the Marshfield Energy Challenge today and see how you can make an impact ... at home or business and in your town. It's all about where we live, work and play.
This unique partnership between NSTAR and the Renewable Energy Trust is aimed at creating community awareness and local commitment to making a greener and more energy efficient town.
Call 866-626-4693 before June 1, 2009 to schedule an appointment for an energy assessment for your home or business and learn how you can save money and energy while contributing to a better Marshfield!

## Internet

The website (<http://www.nstar.com/marshfield/>) continued to attract new visitors each month with numbers through November 2009 noted below.

<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>Apr</b>	<b>May</b>	<b>June</b>	<b>July</b>	<b>Aug</b>	<b>Sept</b>	<b>Oct</b>	<b>Nov</b>
795	738	736	1203	1409	1274	976	831	1077	1413	1049

In addition to basic program information, a photo album of PV installations was displayed on NSTAR's web page:

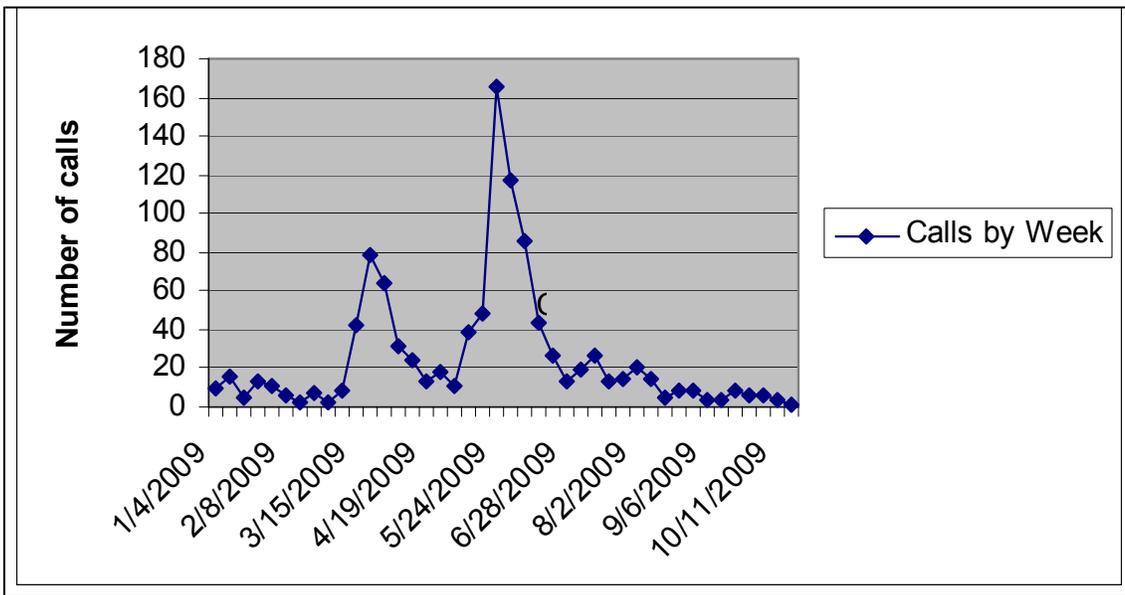
The screenshot shows the NSTAR website interface. At the top left is the NSTAR logo. To the right are navigation links: Home | About NSTAR | Careers | News | Investor Relations. Below the logo is a search bar with a 'Search' button. A blue navigation bar contains 'RESIDENTIAL' and 'BUSINESS' tabs, followed by menu items: Financial Assistance, Rates & Tariffs, Safety, Gas Heating Programs, and FAQ. The main content area is titled 'Home > Residential > Marshfield Energy Challenge > Photo Album'. The 'Marshfield Energy Challenge Photo Album' section features a grid of six photographs showing various residential buildings with solar panels installed on their roofs. On the right side of the page, there is an 'E-Bill' section with fields for 'Username:' and 'Password:', a 'Login' button, and a link for 'Not Registered? Sign Up'.

The “Community Pages” at the independent website [www.marshfield.net](http://www.marshfield.net) linked to NSTAR’s web page through 2009, with its page devoted to the Marshfield Energy Challenge. The program also has made occasional appearances on a Forum page at the independent site. Another independent site, <http://sustainablemarshfield.blogspot.com/> shows the PV installed on the town Recreation Center at no cost to the town, as part of the Marshfield Energy Challenge. The new Marshfield Energy Committee website also offers a wealth of related information, at [www.marshfieldenergy.org/](http://www.marshfieldenergy.org/).

## Results

### Phase Two Campaign Results

More targeted communication and a continuation of the momentum begun in 2008 resulted in an extremely positive program year.



### Overall Program Results

A summary (below) shows on-circuit, off-circuit and totals for each year. The total PV goal was 263 kW, which was exceeded. Residential and commercial PV installation goals were 18 (45 kW) and 6 respectively. With more than 30 home PV systems installed, the kW comprised more than 116 kW. A huge 151 kW-dc commercial installation was completed at Kirwan Surgical Products, Inc. Their press release reads:

*“September 17, 2009 - Kirwan Surgical Products announces the completion of a rooftop solar power project that is expected to generate close to half the power required by Kirwan manufacturing facilities. The 790-panel rooftop array of photovoltaic panels will generate 135 kW of power using state-of-the-art solar technology. Excess power produced and power produced outside of normal business hours will be re-distributed to the energy grid for use in local homes and businesses.”*

The Marshfield Recreation Center is now enjoying a 2.5 kW PV system, the South Shore Audubon Society offices have a 9.4 kW system in operation since November 2009, and a 5 kW system is planned for the Marshfield Middle School.

<b>Approximate Residential Summary</b>			
	On-Circuit	Off-Circuit	All Circuits
<b>2008</b>			
Audits	400	246	<b>646</b>
kW Installed	159	75	<b>234</b>
PV Leads			<b>181</b>
<b>2009</b>			
Audits	402	90	<b>492</b>
kW Installed	331.5	66	<b>397.5</b>
PV Leads			<b>64</b>
<b>TOTAL PILOT</b>			
Audits	802	336	<b>1138</b>
kW Installed	490.5	141	<b>631.5</b>
PV Leads			<b>245</b>

## Community Benefits Beyond Program Scope

The Marshfield Energy Challenge pilot has concluded, but the program lives on in another form. NSTAR Electric formed a partnership with the Marshfield Energy Committee to continue the momentum so that even more kWh savings can be realized. NSTAR formally turned over the brand to the Marshfield Energy Committee at an end-of-summer celebratory cookout. A student interning with NSTAR assisted with a town carbon inventory, and a website was established at [www.marshfieldenergy.org](http://www.marshfieldenergy.org) that gives up-to-date information about the progress made by the committee (hosting energy fairs, engaging in a contract to retrofit town buildings, etc.).

## Replicability

Elements of The Marshfield Energy Challenge are already being replicated in utility territories on both east and west coasts. National Grid is using aspects of the model for their Rhode Island program (see [www.neighborhoodenergychallenge.org/](http://www.neighborhoodenergychallenge.org/) while adding a scoring system). And a new program on Bainbridge Island, WA is getting under way that has been heavily influenced by the Marshfield program. According to Puget Sound Energy (the island's primary electric utility), the stated goals of the Washington program are:

- Improve Energy Efficiency
- Decrease Peak Demand
- Increase Reliability
- Reduce Greenhouse Gas Emissions
- Create Jobs in the Clean Energy Sector
- Raise community awareness on the above

NSTAR hopes that the success of the Marshfield Energy Challenge will extend to other regions and utilities using social media and other online tools. Partnerships among sponsors, vendors, community organizations and others can create expanded and customized versions of the Marshfield Energy Challenge in towns and municipalities.

## Conclusions

NSTAR Electric utilized an integrated and results-oriented community campaign with a partnership approach to achieve excellent response for this pilot, in a time when business owners and consumers are bombarded daily with much superfluous information. NSTAR is now evaluating the cost-effectiveness of a similar program going forward, considering the additional marketing costs that it would entail.

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

In conclusion, the Marshfield Energy Challenge showed that communities, when given the information, tools and incentives, can make positive changes to their energy usage. NSTAR will continue to study the impact of the pilot, including its overall cost-effectiveness, by implementing a monitoring and verification plan designed to measure the direct impact of the load control measures in a statistically significant sampling of participating homes, as well as examine attitudes and participation patterns against a control community. These results are yet to be compiled but a summary will be available for interested parties.