



Residential & Small Business Communications & Marketing Strategy

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PREPARED FOR



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Executive Summary

The Cambridge Energy Alliance seeks to enroll 50 percent of residential consumers and 50 percent of small business consumers in its energy conservation program. To reach this goal, CEA will need to sign up 23,151 residential users and 2,527 small business users for energy savings assessments.

To motivate consumers to sign up, CEA must deliver compelling messages tailored to key segments of consumers. Our stakeholder interviews and our review of SmartPower's existing market research on energy consumers in Massachusetts identified a variety of benefits that should resonate with audiences in Cambridge: environmental protection, financial savings, energy independence and a stronger community. Environmental messaging geared toward more highly motivated, environmentally-minded consumers should focus on the global environmental benefits, while messages about local environmental benefits are best suited to low-motivation, less environmentally conscious consumers. Cost is seen as a major barrier for low motivation consumers, and messages should stress that the program is a sound financial investment rather than a sacrifice. Energy independence – a message theme that CEA has not widely employed to date – may be a powerful theme for low-motivation consumers. Another theme CEA has not widely used – that the program will set Cambridge apart as a national leader on energy conservation – was a strong motivator for community leaders not commonly associated with environmental causes.

We recommend that these themes be tested through a telephone survey of Cambridge homeowners to segment the Cambridge market by motivation for more effective communications. The survey could also be used to test program offerings and positioning. Drawing on the results of this survey, messages and communications products can then be developed and tested in focus groups with key consumer segments. Focus groups would also be held with small-business owners to develop the messages and marketing products and activities.

To deliver CEA's message and reach its ambitious signup targets, we recommend an integrated marketing, communications and community organizing program to raise awareness, generate word-of-mouth communications and mobilize volunteers in every Cambridge neighborhood. The program would include:

Direct outreach carried out by CEA staff to sign up large building owners, owners of large commercial properties with significant numbers of tenants and buildings in the Cambridge Housing Authority network.

Community Leaders campaign that mobilizes constituency leaders across the city who commit to getting an energy makeover, showcasing the improvements to their communities, signing up a set number of consumers and recruiting others to spread the word and host house parties.

Neighbor-to-Neighbor campaign involving house parties, volunteer canvassing and community events, focused intensely on one or two neighborhoods at a time to optimize the efficiency of the campaign and generate high response rates.



Small-business campaign that leverages the Cambridge Chamber of Commerce, Cambridge Local First and local business associations to offer seminars on energy savings as a service to local businesses and a channel for marketing CEA’s program.

Paid door-to-door canvassing coordinated with the neighbor-to-neighbor campaign, focusing intensely on targeted residential neighborhoods and retail business districts each summer.

Online organizing anchored by a consumer-centric, action-oriented website that would generate signups and mobilize volunteers through an energy savings calculator, success stories, neighbor-to-neighbor organizing tools and video tours of home energy improvements.

City of Cambridge initiatives that enroll consumers through the recycling program, licensing commission, home improvement loan program, city-sponsored events and public schools.

Paid advertising to raise awareness and increase response rates through newspaper ads, geo-targeted and subject-targeted online ads, public radio and direct mail targeted at homeowners.

Media coverage on the launch of each marketing campaign, the involvement of high-profile leaders and announcements of major program achievements.

The figure below illustrates how these campaigns work together to achieve the goal. The strategy outlines each component in greater detail and suggests a timeline for the preparation and launch of each initiative.



Objective

The objective of this communications and mobilization strategy for the Cambridge Energy Alliance is to sign up 50 percent of Cambridge households (22,383 units of housing) and 50 percent of small businesses in Cambridge (roughly 2,527 businesses) for an energy savings assessment. A unit will be considered to be signed up if the occupant of the unit or proprietor of the business agrees to an assessment. Every unit or business in a building will be counted if a property owner with multiple tenants signs up. (The level to which residents, businesses or building owners agree to make over their property after the assessment is not addressed here. However, the market research recommended in this strategy will provide useful insights for designing the program to maximize participation rates.)

Targets

Residential

This strategy segments consumers by housing category in order to set numerical goals for program signups. Based on Steve Morgan's figures, the residential market was segmented according to building size with the goal of signing up 23,151 units of housing, or slightly above 50 percent of Cambridge households. The bulk of residential sign ups will come from buildings over 25 units and from the Cambridge Housing Authority. Because there are only 158 buildings over 25 units (excluding CHA buildings), CEA outreach staffers can communicate directly with these large-scale property owners. Working directly with the City of Cambridge, CEA should also be able to enroll most CHA-sponsored housing in the program. A relatively high penetration rate should also be possible in the single-family sector, because most single-family homes are owner-occupied. We expect a lower penetration rate in buildings with to 2-3 and 4-25 units, because most of these are not owner-occupied, making it more difficult to identify the decision-maker. Enrolling mixed-use buildings will also be more difficult.

Residential Targets

Building Size	Buildings	Units	Number Target (Units)	% Target (Units)
Single	3,813	3,813	2,288	60%
2 to 3	5,548	13,182	5,273	40%
4 to 25	1,186	8,381	3,352	40%
26 to 50	77	2,783	1,809	65%
Over 50	81	10,978	7,136	65%
CHA	121	2,674	2,139	80%
Mixed Use	357	2,885	1,154	40%
TOTAL	11,183	44,696	23,151	

Source: Cambridge Community Development Department, "Housing Profile," September 2006.



To reach consumers in different types of housing, a variety of communications channels will need to be employed. The following table illustrates how many consumers are expected to enroll via the recommended communications channels. Of course, several channels will reach consumers in all types of housing. Note that even though some channels will enroll few consumers, these channels are still worth using because they will help raise the visibility of the campaign. (The recycling insert, for instance, will not enroll many consumers, but it will reach almost every Cambridge household.) The table also illustrates how many consumers will need to be enrolled each year – and through each channel – in order to achieve the goal over a five year time horizon. The bulk of residential consumers will be reached through outreach to large building owners and the Cambridge Housing Authority by paid CEA staff. The other channels will primarily be used to target the remaining consumers who live in buildings smaller than 26 units.

Residential Targets by Channel

Channel	Building Size	Target	Annual Target	% of Total Goal
CEA Direct Outreach	Over 25	8,945	1,789	39%
Door-to-Door Canvassing	1 to 25	5,550	1,110	24%
Online	All	2,500	500	11%
Cambridge Housing Authority	All	2,139	428	9%
House Parties	1 to 50	1,317	263	6%
Cambridge Public Schools	All	1,000	200	4%
Community Events	All	800	160	3%
Utility Bill Insert	All	500	100	2%
Recycling Program Insert	All	250	50	1%
Home Improvement Loan Industry	1 to 25	150	30	1%
GOAL		23,151	4,680	

Small Business

Setting targets for small businesses is more difficult because data from the City of Cambridge is more limited on commercial properties than on residential properties. For example, data from the Assessor’s Office identify roughly 1,000 office and retail buildings in Cambridge. However, data on the number of tenants per building is not publicly accessible. In order to effectively carry out direct organizing – the most fruitful channel for enrollment – CEA will need to know which buildings have the greatest number of tenants so it can target those buildings more aggressively. It is likely that the energy service companies will have data on building tenants, since tenants in many buildings pay their utilities individually. We recommend working with the ESCOs to set the targets for small businesses.

Available data does, however, segment businesses by the number of employees, allowing us to set an overall target for small businesses. In Cambridge, 5,054 small businesses employ fewer than 50 employees. To reach a 50 percent enrollment goal, CEA must sign up 2,527 small businesses. It should be noted that 1,580 of the 5,054 small businesses are retail or service



companies with store fronts, which are reachable through door-to-door canvassing. The remaining small businesses will be difficult to canvass, as they are primarily located within office buildings or private homes. The table below sets targets for small-business signups for each communications channel.

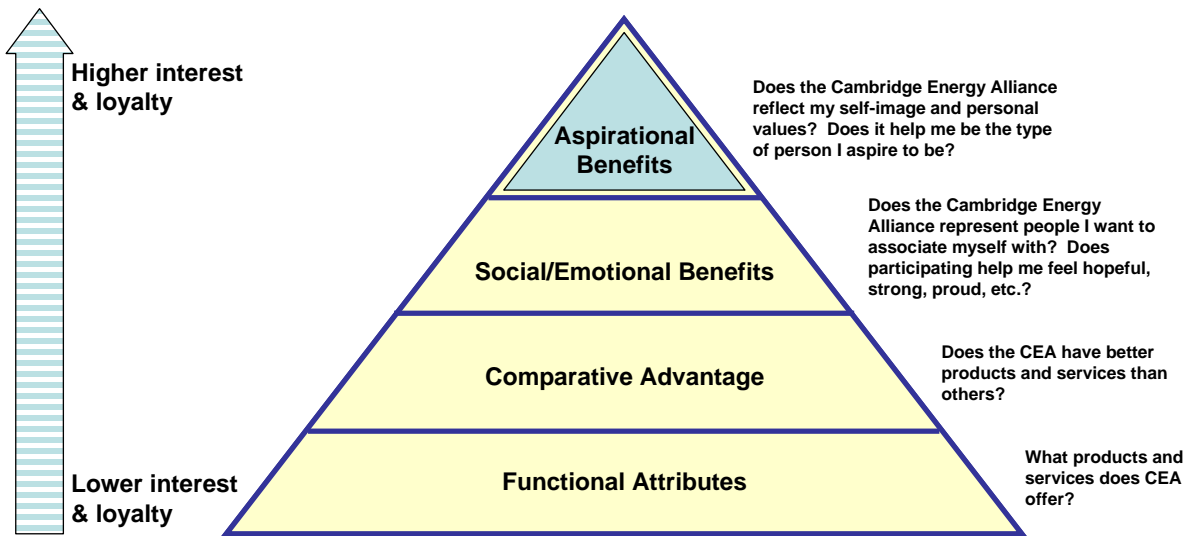
Small Business Targets by Channel

Channel	Total Sign-Ups	Yearly Sign-Ups	% of Total Goal
CEA Direct Outreach	725	145	29%
Energy Savings Seminars	500	100	20%
Door-to-Door	500	100	20%
Online	400	80	16%
Licensing Commission	227	45	9%
Utility Bill Insert	125	25	5%
Chamber Direct Mail	50	10	2%
GOAL	2,527	505	



Message Assessment & Recommendations

Our approach to message research and development is guided by the insights illustrated in the pyramid below, our adaptation of the classic hierarchy of customer needs. This consumer marketing model draws on decades of experience and millions of dollars in research aimed at understanding the factors that influence decision-making and behavior. This model suggests that people choose to participate in initiatives like CEA's energy efficiency program based not only on the perceived economic benefits, but also on appeals to their personal aspirations and values, their social and cultural identities, and the emotional benefits they derive from their participation.



To effectively appeal at all of these levels, a communications and mobilization strategy must begin by segmenting target audiences according to key motivators. Our qualitative research revealed a variety of motivations that may drive participation by two broad groups: community leaders who will help spread the word about the program and consumers who will sign up for assessments.

ASPIRATIONAL	<ul style="list-style-type: none"> ◆ Cambridge-as-leader ◆ Hope for future generations ◆ Save the planet ◆ Energy Independence
EMOTIONAL	<ul style="list-style-type: none"> ◆ Fun of working together/achieving goals ◆ Satisfying/Rewarding ◆ Recognition
SOCIAL	<ul style="list-style-type: none"> ◆ Community connections ◆ Diversity ◆ Connect with Fellow Environmentalists ◆ Be hip – A step ahead of the Joneses
COMPARATIVE	<ul style="list-style-type: none"> ◆ Large-scale project ◆ Save money and the planet
FUNCTIONAL	<ul style="list-style-type: none"> ◆ Reduce energy consumption/pollution ◆ Loans for improvements ◆ Financial savings ◆ Free energy advising

Based on our qualitative research, we identified several aspects of the program that appeal at different levels on the hierarchy. At an aspirational level, the program appeals to those who aspire to see Cambridge lead the country on energy issues, those who hope for a more sustainable world for their children, those who want to protect the planet now and those who want independence from foreign sources of energy. At a social and emotional level, the program appeals because it encourages community-focused social interaction, brings together environmentalists, recognizes those who help the program succeed, involves diverse communities and can enhance the social status of those who participate by making them seem more “current” than others who do not participate. At a comparative level, the project is almost unprecedented in the energy conversation goal it has set and offers consumers a rare opportunity to save money and help the environment at the same time. Functionally, the program offers loans for home improvements, future financial savings, free energy advice and promises to reduce pollution.

It is also useful to group these appeals into categories of benefits that will motivate consumers to participate in the program: financial savings, community benefits, national benefits and environmental benefits. These motivators are described below in greater detail.

While our qualitative research helped to identify and better understand why certain messages appeal to consumers, we recommend in-depth market research with Cambridge consumers to identify and quantify consumer segments based on motivations. Detailed market research recommendations appear at the end of this section.



Environmental Benefits

Our qualitative research with stakeholders confirmed that awareness about environmental issues is high, but that motivation to take action may be low. Many interviewees stressed that their constituents had not taken action to address environmental problems, due primarily to a perceived lack of time and money. This suggests the need to broaden the appeal of environmental messages and ensure that the program and its positioning address potential concerns over the perceived commitment of time and money.

A segment of Cambridge residents understand what it means to reduce their energy “footprint” and how efficiency improvement measures in their own homes or businesses will have a positive impact on the world. Some of these environmentalists are already lining up to help, and many have already made energy-saving changes in their lives. They should be engaged in the program, but they are not necessarily the largest audience or the segment most in need of motivation. Messages focusing on environmental benefits should reach beyond the environmentally minded and speak to other segments.

Based on our qualitative research, we recommend two separate environmental messages: one focused on environmentalists that stresses *global* environmental benefits and another aimed at general consumers that stresses *local* environmental benefits.

- **Global Environmental Benefits.** SmartPower research on energy consumers in Massachusetts suggests that the threat of global warming is a significant motivator for more environmentally minded consumers. Our interviews with these stakeholders revealed that environmentalists are most excited by the program’s potential to help alleviate global warming. They are motivated to act by the thought that their actions in Cambridge will have a global impact. This theme should be useful with volunteers and consumers. It is already leveraged in CEA’s slogan, “Save money and the planet.”
- **Local Environmental Benefits.** Some of our stakeholder interviewees, especially from low- and moderate-income communities, cautioned that many people in their communities are not environmentally minded and might dismiss the program if it sounds geared towards “tree huggers.” They stressed that their constituents will not value global benefits because they are more worried about local problems like rats, trash pick up and keeping the streets safe. These audiences may be more responsive to environmental benefits with local impact, such as reduced emissions from upgraded furnaces and less noise pollution from loud heating and cooling systems.

Stakeholders representing low-income communities suggested that many people in their constituencies see environmental issues as “someone else’s problem.” As one interviewee put it, “those other people are doing that work, and God bless them, because I can’t (do it).” We recommend that the market research explore whether environmental concern and motivation tends to decline with income levels. It will be important to see if the general trend toward environmental awareness and concern can be observed among low-income communities.



Financial Benefits

While the cost of participating will not be a barrier to a significant segment of Cambridge consumers, it will be a consideration for others. SmartPower conducted a survey of Massachusetts energy consumers that included “high motivation” consumers who participated in a program to buy clean energy and “low motivation” consumers who did not. While only 19 percent of high motivation consumers cited cost as a major barrier to participating in the program, 75 percent of low motivation consumers cited cost as a major barrier to participating in the program.

Our stakeholder interviews echoed the findings of SmartPower’s research. Stakeholders, especially those from low-income communities, stressed that members of their communities would not be interested in the program unless it promised to save them money on their energy bills. Meanwhile, representatives of highly motivated consumers – who tended to be more environmentally minded – said cost was not a barrier. Environmentalist stakeholders pointed to a widely supported wind energy initiative in Cambridge that required consumers to pay an extra \$100 on their utility bills for a ten-year period to finance the construction of a wind turbine.

CEA’s efficiency program stands out from other environmentally focused initiatives in part because it offers compelling financial benefits, in addition to the environmental benefits. The financial benefits will be new and exciting to a substantial segment of CEA’s audience, especially cost-conscious consumers. According to stakeholders who represent homeowners and low-income communities, helping the environment is often seen as a luxury – a concern for people who don’t struggle to pay their bills. CEA can broaden its appeal by continuing to communicate that greater energy efficiency is not a luxury or a sacrifice – it’s an investment that will pay off financially. This theme is already being leveraged by the slogan, “Save money and the planet.”

Tangible examples of “savings” – including figures on energy savings and financial savings – will be essential for appealing to Cambridge residents not attuned to environmental issues. This theme should help motivate financially conscious consumers, low-income residents and businesses concerned about their bottom line.

National Benefits

Independence is always a good word for keying in to the emotions and aspirations of Americans. The public debates around high oil prices and the war in Iraq continue to make clear that, when it comes to energy, Americans are not independent. Recent public opinion data from Greenberg, Quinlan and Rosner suggest that when Americans think about energy, their highest aspiration is to achieve energy independence. SmartPower’s research also found that the energy independence theme was the most persuasive message in moving low motivation consumers to participate in programs that help reduce consumption. In developing its message thus far, however, CEA has made little mention of the national economic and security benefits of greater energy independence.

Moving forward, CEA may strengthen its aspirational appeal by reminding Cambridge residents that conserving energy will not only save them money and protect the environment, but also contribute to making America energy independent. Energy dependence and global warming are



two distinct problems, troubling to distinctly different segments of the population. CEA activities and communications can appeal to citizens concerned by both issues.

Community Benefits

Some Cambridge residents will have a harder time making the link between CEA – a program with a very limited geographic target – and any benefits on a global or national scale. Furthermore, for some higher income residents the program’s financial benefits will not resonate. Where the environmental, financial and national/global benefits fail to resonate, CEA can highlight other benefits that participation in CEA programs will bring to Cambridge as a whole and to individual Cambridge neighborhoods. We see two distinct themes in the area of community benefits:

- **Cambridge as National Leader.** CEA is intended to be a model for cities throughout Massachusetts and the United States. The program has the potential to make Cambridge *the* standard bearer of energy efficiency regionally and nationally. Of all the messages we tested with stakeholders, the Cambridge-as-national leader message resonated the most. While Cambridge as an environmental leader will obviously motivate environmentalists, other community leaders are excited by the prospect of Cambridge being the first, best, national model for *anything*. For other residents, as well, the Cambridge-as-leader message could be an important secondary motivator. People want to live in a place that is special and important. And while city pride may not be a powerful enough message on its own for the majority of the population, this theme could help tip the scales when other messages fall short. Furthermore, convincing residents that Cambridge will be a leader has the added effect of lending more credence to the message about national and global benefits. One city’s reduction in energy consumption has a negligible effect on global warming and national energy dependence, but a *model* city may impact well beyond the city limits.
- **Stronger Neighborhoods.** Most stakeholders, especially those representing neighborhood associations, stressed that residents respond to programs that show tangible, street-level improvements in parks, sidewalks, public safety and property values. Interviewees also stressed that programs such as park cleanups, which encourage neighbors to work together to improve their neighborhoods, build community pride and create a sense of shared accomplishment. These themes could be leveraged in the message and organizing program to motivate neighbor leaders and homeowners.

Moving Consumers from Awareness to Action

For consumers to be motivated to take action, they must first care about the need or problem, and be aware of potential solutions. Based on our qualitative research and a review of national data, we believe that CEA does not need to invest resources in raising awareness of energy and environmental issues, or in introducing energy efficiency as the solution. Consumers are already concerned: A national survey conducted in May 2007 by Greenberg Quinlan Rosner Research confirmed that concerns about global warming and energy independence have risen to the top



of the domestic agenda, second only to health care (and surpassing education and retirement security). Furthermore, CEA needs to spend minimal time explaining why its efficiency program will help solve the problem, because the solution is intuitive: The problem is using too much energy, so using less energy will help solve it.

The bigger hurdle is showing people how their individual action can make a difference, given the global nature of the problem. They must also believe that the actions they can take are affordable and convenient, not overly burdensome. Residential and business consumers are bombarded with demands on their time and energy. They will only choose to participate in a program if they expect their investment of time and money are feasible and will yield measurable benefits. Therefore, once interest is raised through the themes identified in the previous section, target audiences will need clear, simple messages about what they can do to get involved. We recommend the following strategies for consumer-oriented messaging:

- **Use consumer-friendly language.** When describing the assessment to consumers, we suggest avoiding the term “home energy audit.” The term “audit” is not consumer friendly – the word carries negative, punitive associations and suggests that the consumer has done something wrong. We recommend using a term like “**home energy checkup**” to engage residential consumers and make the process seem less intimidating. This language evokes a friendly visit to a doctor who will check on you and make sure you are healthy. Once consumers actually agree to retrofit their houses, we suggest calling the process a “**home energy makeover**.” A “makeover” sounds like a fun process that consumers will enjoy, not a “retrofit” or “overhaul” that sounds costly and laborious. While we believe that these two terms will be well received by consumers, we recommend testing them in market research.
- **Simplify the offering.** Extensive market research has demonstrated that people can be overwhelmed by an overabundance of choices. Long lists of options for energy-saving products, services and behavioral changes are likely to be daunting. CEA will benefit from offering consumers a few, well-packaged options for upgrading their homes or businesses. The idea is to simplify the offering to the consumer and make it look relatively easy to make the changes necessary to have an impact. We recommend that CEA test basic packages of products for residential customers and businesses. For example, the packages could bundle appropriate products under simple headings indicating the type of energy to be saved: electricity, gas, oil and water. This approach frames the product offering according to tangible outcomes – and in terms of the utility bills that are the customers’ typical interface with the energy issue.
- **Engage customers incrementally.** CEA should engage consumers incrementally, drawing them in with a relatively simple call to action and then presenting a broader range of options. Accordingly, we recommend against asking consumers to sign a lengthy contract up front in order to get an assessment. This requirement implies a burdensome legal arrangement and may well be a major obstacle to the goal of signing people up. Rather, we suggest that



people simply sign up for a “free home energy checkup” (and then sign the agreement when the assessment takes place).

- **Tell success stories.** Consumers will understand the program best if they can see and hear about neighbors who have gotten their checkup and upgraded their homes. Thus our call-to-action message and communications strategy will include success stories about a diverse group of community leaders, residents and business owners who have participated in the program.
- **Tweak the tag line.** CEA’s current tag line – ‘Saving money and the planet’ – does a good job conveying the program’s major benefits, but does not emphasize consumer action. It focuses on what CEA itself is doing (*CEA* is “saving”), not what it allows Cambridge residents to do. We believe that a simple alternative formulation – **Save money and the planet** – will focus the tag line on consumers with a direct call to action.

Market Research & Message Development

The stakeholder interviews generated a range of potentially compelling themes to motivate consumers. We believe these findings offer an adequate set of concepts that can appeal to consumers and small-business owners. The next steps in the process will be to quantify the appeal of each theme and test language that communicates these themes in the most compelling manner. This data will help CEA make informed decisions about the use of its communications resources.

For this purpose, we recommend in-depth qualitative and quantitative market research with potential residential and small-business customers. A survey would test the appeal of key themes and marketing channels; focus groups would be used to test specific messages and communications products. This approach would get the marketing and communications program up to speed in the shortest possible time. The research program would involve the following components:

- **Market survey.** A telephone and/or online survey of Cambridge homeowners would identify the themes with the broadest appeal to the largest number of residents. The survey will also identify sub-themes that motivate specific segments of the population and quantify those segments (e.g., environmentalists, cost-conscious homeowners, community-minded residents, etc.). The research would also test ideas for the product offerings and identify the best marketing channels for reaching key audience segments.
- **Homeowner focus groups.** Four focus groups would involve owners of single-family homes, condos and small (1-3 unit) buildings from a diverse range of neighborhoods and demographic categories. These sessions would test specific messages, slogans, brands, communications products and product offerings to determine the content of CEA marketing communications and inform the design of the residential program.



- **Small-business focus groups.** Two focus groups with Cambridge business owners would explore the incentives and obstacles that influence small-business participation in the program. The sessions would test ideas for maximizing small-business participation through compelling messages and turnkey program solutions. These focus groups could be conducted in partnership with the Cambridge Chamber of Commerce and Cambridge Local First.



Communications and Marketing Campaign

In today's crowded communications environment, consumers are bombarded with demands on their time and money. As new media sources have proliferated, consumers have increasingly turned to friends, family and coworkers as the most reliable sources of ideas and information. Consequently, word-of-mouth communication has achieved a new status as the best form of advertising. According to a recent *Roper Report* survey, while 40 to 50 percent of consumers still cite paid advertising and news reports as good sources of information, over 90 percent of consumers believe friends or family members are good sources of information.

Accordingly, we recommend a word-of-mouth, community-focused organizing campaign. This campaign would be fueled by a mix of media coverage, advertising and events to maximize exposure of key messages, raise awareness of the sign-up effort and generate excitement in the community. Community organizing would be facilitated by the Internet, with online tools that make it easy for residents to spread the word and sign up for the program. We envision a two-phase grassroots campaign, focusing first on community leaders and then on neighborhoods.

Community Leaders Campaign

This campaign will tap into pre-existing social networks and focus its initial outreach efforts on signing up influential leaders throughout Cambridge. The Community Leaders Campaign will deploy leaders to sign up their constituents for energy savings checkups and to recruit individuals to organize their own social networks.

CEA should seek out leaders who appeal to a diverse set of audiences and have direct channels to homeowners, community organizers and volunteers. These Community Leaders should be willing to deliver CEA's message to their constituencies, make over their homes and commit to recruiting a specific number of people in their communities to sign up for the program. By involving local leaders, CEA will garner credibility, visibility and success stories that will lay the groundwork for effective neighbor-to-neighbor and business-to-business outreach. We recommend launching a Community Leaders Campaign as soon as the program is ready, beginning with discussions among supportive community leaders to test ideas for the design of the Community Leaders Campaign.

Process

1. **Recruitment.** CEA will need an Outreach Director to recruit community leaders. As with consumers, the message to leaders should be benefits-oriented and appeal beyond the environmental constituency. CEA will need to make clear up front that the leaders will be asked not only to talk about the program, but also to commit to sign up people in their network to get assessments and hold house parties.
2. **Checkup and Makeover.** Soon after signing on and beginning to engage their network, community leaders should have their own energy efficiency checkup and makeover of their home, business or associated building (e.g., church or community center). After the improvements have been made, the leaders should – with the help of CEA Outreach



personnel and a House Party Toolkit – host a gathering to showcase their improvements and sign up others.

3. **Community Signup Campaigns.** CEA will work with leaders to set realistic goals for signups and house parties in their communities, and to develop strategies for meeting those goals. Whatever the individual strategy, the CEA will provide ideas, collateral materials and support to facilitate the leader’s communications with his/her community.
4. **Recognition.** Public recognition of Community Leaders’ energy makeovers and signup campaigns will raise awareness of the program and incentivize leaders to meet their goals. CEA can present awards to high-performing leaders, issue press releases to the *Cambridge Chronicle* and *Cambridge Tab*, and feature stories about Community Leaders on CEA’s website with text, photos and video. In October of 2008, CEA should host a city wide celebration to honor the one year anniversary of the program and also to recognize leaders.

Goals

Each leader should agree to a goal of signing up 10 households for the program and recruiting three of their constituents to host house parties. CEA should aim to recruit 15 leaders in the first year, followed by 10 in each of the next three years. At this rate, CEA can expect to generate roughly 960 sign ups – well over half of the total goal for house party signups. (The remainder of the house party goal will be achieved through the neighbor-to-neighbor campaign.)

Leaders Per Year	Signups Per Leader	House Parties Per Leader	Signups Per Party	Attrition Rate	Signups Per Year	Signups Over 4 Years
10 - 15	10	3	10	40%	240	960

Leaders to Target

Elected Officials. Cambridge elected officials have volunteer networks and lists of supporters who participate in their election campaigns. The more active officials look for ways to engage their constituents on important issues and keep their most active supporters busy in non-election years. We recommend reaching out to all members of the Cambridge City Council, as well as State Representatives and State Senators who represent parts of Cambridge.

Members of the Clergy. Clergy members have already expressed interest in spreading the word about the program. We have identified Massachusetts Interfaith Power and Light (with six churches in Cambridge) as a ready partner, and stakeholder interviews suggest that CEA should also look to working with the Episcopal Church, Catholic Church, Temple Beth Shalom and Black Pastors Association.

Neighborhood Association Leaders. Recruiting neighborhood association leaders for makeovers and house parties will set the stage for the broader neighbor-to-neighbor campaign. Nearly all of Cambridge’s 13 neighborhoods, along with Harvard Square and Porter Square, have neighborhood associations. Their leaders are valuable resources, and



we recommend that they all be targeted. We have already interviewed representatives from the Area 4 Coalition and Porter Square Neighbors Association, both of whom were eager to receive more information and to begin organizing their neighborhoods.

Business Leaders. Business leaders can help identify businesses to target and spread the word about the program through their functions and publications. Cambridge Chamber of Commerce and Cambridge Local First, which have city-wide reach, are both ready to participate in the program, and their leaders should be asked to participate in the Community Leaders Campaign. CEA should also reach out to the presidents of neighborhood business associations like the Harvard Square Business Association and Central Square Business Association, which are in communication with hundreds of businesses.

Directors of Community Centers, Senior Centers and Youth Centers. Community centers, senior centers and youth centers reach into many Cambridge neighborhoods, including hard-to-reach low-income areas. Stakeholder interviews indicated that key community centers to target include East End House in East Cambridge, the Margaret Fuller House in Area 4 and the Community Learning Center in Cambridgeport. CEA will want to explore opportunities with the various senior centers and youth centers in these and other neighborhoods.

Neighbor-to-Neighbor (N2N) Campaign

Building on the Community Leaders campaign, we recommend an intensive, neighborhood-by-neighborhood approach to signing up residential consumers. The Neighbor-to-Neighbor Campaign will launch intensive outreach efforts each year from May through August, when it is easiest to canvass residential neighborhoods. The campaign will engage volunteers and a paid canvassing team to organize house parties, stage block parties and canvass door-to-door. The goals of the N2N campaign will be 1500 signups through house parties and volunteer canvassing, 500 signups through block parties and other events, and 4,800 signups through paid canvassing.

Volunteers. Volunteers will work to enroll their neighbors, family and/or friends for energy savings checkups, and recruit others to hold house parties. The volunteers will need to be recruited, trained and coordinated by a full-time, paid CEA Volunteer Coordinator. We recommend supporting the work of the Volunteer Coordinator with an action-oriented website that provides volunteers with guidance, downloadable lists of neighbors, a party hosting kit and motivational tools. (See “Online Communications” for more detailed recommendations.) The environmental community will be a significant source of volunteers, especially Greenport and Green Decade Cambridge which together boast 30 to 50 volunteers in Cambridge. The leadership of both of these groups said that they would make participation in the CEA initiative their primary focus of activity if they are called upon to help. We also recommend obtaining volunteers from: elected officials during non-election years, college students who are Cambridge residents and from the Mayor’s Summer Job Program.

House Parties. House parties are an excellent, viral method to spread the CEA message and generate signups. We recommend that, at least initially, house parties serve as the primary



vehicle for volunteers to participate in the program. The house party program should be constructed as follows:

- Hosts should invite their friends and family and, to the extent they are comfortable, use lists provided on the CEA website to invite their neighbors. Hosts will be provided with a House Party Kit that includes template print and electronic house party invitations, print collateral and a list of neighbors to invite.
- The Volunteer Coordinator or another CEA representative should attend each house party to speak about the program and sign people up in person. Those who do not agree on the spot should be given a piece of collateral and receive a follow-up phone call within one week.
- CEA should produce a DVD with an inspirational message to show at each party. Though CEA speakers should provide logistical information about the program, they cannot be counted on to deliver an inspiring message that will appeal to a consumer's aspirations or emotions. A well-produced DVD can accomplish this.

Events. The City of Cambridge Outreach section below describes events that CEA can target to enroll Cambridge residents. Volunteers from the N2N campaign can be used at those events to canvass the crowds.

Door-to-Door Campaign

We understand CEA is considering the use of energy service companies to conduct door-to-door canvassing to sign people up. If the ESCOs have the capacity to undertake a substantial canvassing effort, we recommend using them because their canvassing staff will likely be skilled, professional and knowledgeable. In addition, SmartPower's market research suggests that a majority of consumers prefer to receive information about energy products through ESCOs, suggesting that an ESCO-led canvassing effort would achieve a good respond rate.

If the ESCOs cannot handle most of the canvassing, we recommend a paid canvassing program utilizing trained Cambridge residents. We do not believe that a volunteer-only effort could achieve the signup goal of the canvass program. Without the practice of canvassing day after day, volunteers typically achieve much lower response rates than paid canvassers. In this case, we recommend that CEA hire a Canvass Director to oversee the canvass program during the four-month campaign period. Either the Canvass Director or a consultant will need to develop a detailed canvassing plan that consolidates existing consumer data, sets a list of targets based on this data and sets daily and weekly canvassing goals. Below, we offer some preliminary thoughts on what such a canvassing program would entail.

We recommend an annual canvassing program be conducted for four months (May-August) for each of the five years of the program. The canvass program should focus exclusively on one neighborhood at a time for approximately two months before moving on to the next neighborhood (see below). A neighborhood-focused approach will be more cost-effective (e.g.,



lower transportation costs), leverage local word-of-mouth and targeted advertising to raise the visibility of the program, and ultimately achieve higher penetration in targeted areas.

To provide *rough* estimates of the scale of the program, we have relied upon some basic canvassing principles. We recommend canvassing each neighborhood two or three times to improve the contact rate. That will require roughly four to six canvassers per summer. The cost of the canvassing program can be brought down significantly if CEA recruits young people to canvass. CEA can pay each canvasser roughly \$3,000-\$4,000 per summer and a canvass director \$5,000 to \$6,000 per summer. Assuming four canvassers, a field director and incidentals such as collateral, transportation, computers and software, a high-quality canvassing program will cost in the ballpark of \$30,000 per summer. Local canvassers can potentially be recruited through the Mayor's Summer Job Program, college students and campaign volunteers of elected officials (during off-election years).

Especially in low-income neighborhoods, CEA should work to recruit local talent to canvass. Canvassers who match the demographic makeup of the neighborhood and/or speak the same language as non-English speaking residents will achieve much higher response rates. The Literacy Ambassador program of the City's *Let's Talk* campaign is a good model to follow.

Order of Neighborhood Targets. In order to reach every neighborhood in Cambridge by the end of the five-year time horizon, CEA will need to canvass two to three neighborhoods per year. To achieve target response rates, we recommend that the Volunteer Coordinator focus on activating volunteers in the target neighborhoods shortly before the paid canvassers begin working in those neighborhoods. Higher-income neighborhoods would be canvassed in late spring and early summer, before large numbers of residents begin taking summer vacations. Lower-income neighborhoods can then be canvassed during the latter half of the summer. Starting with Cambridgeport will allow CEA to leverage the volunteer base of the Greenport environmental group and help score early victories. We recommend canvassing Area 4 and Wellington-Harrington next to demonstrate early on that CEA is committed to including low-income communities in the program. The ordering of the remaining neighborhoods is less important, though we have included a proposed schedule based on neighborhood size, geography and median income. Some smaller neighborhoods have been grouped together as they will require less time to canvass.

- Cambridgeport (May – June, 2008)
- Area 4 / Wellington-Harrington (July – August, 2008)
- Mid-Cambridge (May – June, 2009)
- North Cambridge (July – August, 2009)
- West Cambridge (May – June, 2010)
- East Cambridge (July – August, 2010)
- Agassiz / Strawberry Hill (May – June, 2011)
- Area 9 / Cambridge Highlands (July – August, 2011)
- Area 2 / Riverside (May – June, 2012)



N2N Communications Products

- Residential consumer brochure
- Homeowner direct mail
- House Party Toolkit
- DVD
- Online organizing tools

Small-Business (B2B) Campaign

CEA's campaign targeting small businesses will closely resemble the neighbor-to-neighbor campaign for residential consumers. Like the N2N campaign, the B2B outreach effort will begin with business leaders and expand outward with an intensive neighborhood-based approach and strategic canvassing. However, the Small Business Campaign will incorporate different messages and different products aimed specifically at business owners. We recommend focus groups with small-business owners to test the effectiveness of messages and products.

Small Business Associations

The Small Business Campaign will collaborate with existing business organizations to offer Save Energy Seminars as a service to small-business owners. This approach positions the program as a valuable service offered by the collaborating business associations – and as a vehicle for CEA to sign up businesses for the program. The seminars and energy savings program will be promoted through canvassing, print advertising, online promotion and targeted mailings. We recommend that CEA hire a Small Business Outreach Director who will work with local business organizations to set targets, identify business leaders, plan and publicize seminars and facilitate communications with the small-business community. The Small Business Outreach Director will work with each organization to set an achievable target for signing up members, organize Save Energy Seminars explaining the program to members, and raise the visibility of the program through member communications. These organizations may also provide CEA with a list of members to facilitate canvassing and targeted mailings.

Chamber of Commerce. The Cambridge Chamber of Commerce has about 1,500 members, the majority of which are small businesses with fewer than 10 employees. In addition, the Chamber newsletter reaches 2,000 addresses. The Chamber's leadership is already interested in collaborating with CEA.

Cambridge Local First. Cambridge Local First has a membership of approximately 200 locally owned businesses. Its activities include organizing workshops, seminars, conferences and other learning and training opportunities. Cambridge Local First may also wish to participate in neighborhood small-business canvassing as a way of reaching prospective members.

Local Business Associations. The Harvard Square Business Association (350 members), Central Square Business Association (180 members) and Inman Square Business Association (140 members) can be engaged to organize their members and area businesses.

Canvassing



Most Cambridge small businesses are not members of business associations, so reaching out to businesses door-to-door and face-to-face will be important for generating signups. Because many small businesses are located in non-accessible office buildings, the campaign should primarily target retail, restaurants and other store front business. Because these businesses are the most visible, we also recommend that CEA develop a branded window sign or window sticker for display that can be distributed as part of the canvassing effort.

Coordination With Existing Programs

City of Cambridge programs, like the Cambridge Climate Leaders program and the GoGreen Business Awards, aim to lessen the environmental impact of the city's businesses. Cambridge Climate Leaders has enlisted 20 businesses in a comprehensive program that goes beyond energy efficiency. Similarly, the GoGreen Awards recognize those businesses that make the greatest strides in the areas of energy conservation, waste reduction and transportation efficiency as part of GoGreen month in May. To avoid confusion among small-business targets, we recommend that the City integrate CEA's energy savings program as an activity of the GoGreen and Climate Leaders programs. Enrolling in the CEA program could become an option or requirement of becoming a Climate Leader or receiving a GoGreen Award.

B2B Communications Products

- Energy Savings Seminar presentation
- Small-business brochure
- Small-business direct mail
- CEA window sign or sticker

Online Communications

A strong online presence will help CEA sign up residents and businesses for energy assessments and serve as a resource to activate volunteers. In order to maximize this potential, the website needs to be action-oriented and consumer-centric. The current website is well suited to inform CEA stakeholders, policy experts and elected officials about the organization. However, it is not designed to engage consumers or mobilize activists. CEA should create a new, consumer-oriented site with a unique web address such as: www.cambridgeenergycheckup.org.

Below is an example of a consumer-centric, action-oriented website from the Women's Campaign Forum. While this is, of course, a very different initiative, the CEA website will want to incorporate some of the same concepts. The home page should engage consumers and activists by prominently displaying opportunities for users to take action or learn more about the initiative (see ①). It should include prominently opportunities for people to pass on information and engage others (see ②). The home page design should be visually stimulating, with links to more detailed descriptions of the various aspects of the program.





Source: The Women's Campaign Forum, <http://www.wcfonline.org/>

Online Organizing Tools

We recommend creating the following online tools and features to allow consumers and volunteers to learn more about the initiative and take action:

- Campaign Thermometer.** The monthly enrollment goal should be displayed on the homepage in the form of a thermometer to help catalyze activists. Each time an activist enrolls a new person, he or she enters the new enrollee's into the website's data portal and the thermometer rises. As the thermometer rises, activists will see their contribution added to the efforts of others in moving the program towards the goal. The thermometer icon will motivate the community effort as well reinforce the environmental motivation of combating global warming.
- Community Leader, Volunteer and Consumer Profiles.** The home page should feature stories, video and photos of community leaders showing their homes, volunteers describing their successes and consumers talking about the ease of participating in the program.
- House Party Toolkit.** The house party kit will include downloadable products as described in the "Neighborhood-to-Neighborhood Outreach Campaign" section. Party to Win offers a terrific online tool for managing and tracking house parties. CEA should consider using it for its house party program: <http://party2win.com>

- **Home Energy Calculator.** The CEA site should prominently feature a Home Energy Calculator on the website that will allow consumers to learn how much energy they currently use in their homes and businesses and how much they could save – if they participate in the program. The page should prominently feature a clickable icon that offers a “Free Home/Business Energy Checkup” for users to sign up for their assessment. Below is one example of an online energy calculator from the Lawrence Berkeley National Laboratory.

Environmental Energy Technologies Division, Lawrence Berkeley National Laboratory, <http://hes.lbl.gov>

- **Community Leader, Volunteer and Consumer Profiles.** The home page should feature stories, video and photos of community leaders showing their homes, volunteers describing their successes and consumers talking about the ease of participating in the program.
- **Walking Tour of Energy Assessment Process.** To show web visitors the ease of participating in the program, we recommend creating an online walking tour of the process. A web camera crew can follow an energy assessment



professional through a home to show what they look for during the audit process. The second half of the video could walk through the house again after the energy improvements have been installed to showcase the new features and savings.

- **Web Video Contest.** Cambridge has a large creative community and an active community-access cable program. CEA can partner with Cambridge Community Television (CCTV) to produce and air public service announcements about the program. This is a free, community-based channel to spread CEA’s message and engage a segment of the community that is motivated to create and share content. CEA can promote the effort through a web-based contest to create a video to be aired on CCTV and, perhaps, local cable television. This type of creative effort is a useful model for generating “buzz” with minimal investment.

A Dynamic, Consolidated Database

For the online program to succeed – as well as for the on-the-ground organizing and canvassing to succeed – the Cambridge Energy Alliance will need a powerful, consolidated database. The database should contain contact information and relevant consumer data on each resident and small business in Cambridge. We understand that the Alliance is currently exploring obtaining a list of consumers from an energy service company. Depending on the quality of the list provided by the ESCO, the Alliance may want to enhance the list with other relevant consumer data. For example, we confirmed with the Cambridge Assessors Office that a list of all property owners in Cambridge is publicly available. Since ownership status will be important in targeting consumers, integrating this information into the database will be worthwhile.

City of Cambridge Initiatives

CEA will benefit from coordinating with City of Cambridge programs, events and institutions to connect with the community. A successful partnership with the City will help ensure that CEA’s message reaches all segments of the Cambridge population in a cost-efficient manner.

Events

Throughout the year, the City sponsors numerous special events that provide opportunities to reach residents with information on the program. CEA should generally forego large, city-wide events like the Cambridge River Festival, Cambridge Carnival and Taste of Cambridge, which attract significant numbers of non-residents. Event outreach should focus on activities that attract primarily Cambridge residents and hard-to-reach communities. Some examples of the types of events we feel will be most effective in generating signups for CEA include:

- **Block parties.** The City, the Cambridge Police Department and a number of neighborhood associations are involved in organizing and funding block parties. Block parties could be extremely effective in enrolling residents if they are treated like house parties on a larger scale. CEA should provide knowledgeable personnel, a simple toolkit and sign-up materials to block party organizers, and



use block parties to enroll residents on the spot. CEA should acquire from the City a list of residents who have taken out block party permits and organize a system whereby CEA is informed every time a new block party permit is requested.

- **Danehy Park Family Day.** (*September, North Cambridge*) Danehy Park Family Day is a free, annual outdoor event that attracts over 4,000 people – predominantly families and Cambridge residents. Last year, the park’s Family Day featured an “Energy Adventure Tent” with prizes and information on alternative energy sources.
- **Summer in the City performances.** (*July-August, across the city*) Presented predominantly in parks throughout the city, the series is aimed at families and designed to appeal to Cambridge residents of all backgrounds.
- **Cambridge Science Festival.** (*April, across the city*) Though significantly larger in its scale than the other recommended events, the festival, and particularly its kick-off Science Carnival in Central Square, could still serve as an effective platform for CEA to broadcast its message. The event is highly community-focused – it “reveals Cambridge’s hidden science treasures to the community and celebrates Cambridge’s achievements” – and is more likely to attract an audience receptive to environmental messages.
- **Neighborhood cleanups.** Neighborhood clean-ups attract Cambridge residents who clearly respond to environmental and community messages. They are organized throughout the city in warmer months.

Co-Marketing Collaborations

The three City programs that we see as the most important CEA outreach partners are the Department of Public Works recycling program, business licensing and the home improvement loan program.

- **Recycling program.** The Department of Public Works has already made strides in opening up a dialogue with citizens about environmental issues, and periodically sends mailings to all households. CEA can work with the Department of Public Works to develop a CEA insert to the recycling program’s mailing and reach all residents in an extremely cost-effective manner. Additionally, the program has a wealth of information about communities, businesses and population segments that have been receptive to past environmental campaigns.
- **Business Licensing.** Businesses in Cambridge must regularly apply for and renew licenses from the City of Cambridge. This presents an excellent opportunity for CEA to reach out to businesses. The Licensing Commission has already expressed willingness to provide businesses with information about the CEA program when they apply for or renew their licenses. CEA may also want



to partner with the City Clerk's Office because businesses must register or reregister with the Clerk's Office every four years.

- **Home improvement loan program.** The City's home improvement loan program for low- and moderate-income homeowners is actually administered through two separate organizations: Just-A-Start (for properties in East Cambridge, Wellington Harrington, Area 4, Cambridgeport and Riverside) and Homeowner's Rehab, Inc. (for properties in Area 4, Mid-Cambridge, Agassiz, Area 9, West Cambridge, North Cambridge, Cambridge Highlands and Strawberry Hill). Both organizations provide low-interest loans to households looking to make substantial home improvements, including energy efficiency improvements. We recommend that CEA partner with both of these organizations to reach low-income homeowners.

Cambridge Public Schools

The Cambridge Public Schools are a major channel to home owners throughout the city. CEA should work with school department officials to develop an engaging, educational "Energy Footprint" project that makes use of the online energy calculator to educate children and their families about their home energy use, with the goal of enrolling parents in the program. The project would provide a relevant, informative lesson for students with genuine educational merit.

The classroom lesson would focus on a simplified energy evaluation of the school, in which students learn how the school uses energy and what measures administrators have taken to improve efficiency. To educate parents, a take-home assignment would require students to apply what they learned to their own homes. They can use the online energy calculator with their parents to calculate their home energy use and potential savings. To create incentives for participation, the program could create material such as CEA-branded stickers and posters that can be displayed in classrooms and homes. Because elementary schools often have more leeway in incorporating new activities into their curricula, and because parents of younger children are typically more actively engaged in their child's learning, we recommend that CEA focus its schools program at the elementary level.



Advertising

In addition to grassroots outreach efforts described above, we recommend paid advertising and promotions to raise the visibility of the program. Online, radio, TV and print advertising will be utilized strategically citywide and in targeted areas to generate interest in the outreach campaign and increase response rates. The advertising plan would be developed in more detail along with the organizing plan, but we envision a mix of the following vehicles:

- **Online.** Online ads are a cost-effective way to reach consumers and drive them directly to the CEA website. SmartPower market research suggests that among both high- and low-motivation energy consumers in Massachusetts, online sources are the number one source of information on energy issues. Online ads can be geo-targeted to Cambridge and subject-targeted to reach homeowners and people interested in the environment. For the initial phase of the campaign, we recommend subject-targeting ads to stories about the environment on the *New York Times* website and Boston.com, which reach opinion leaders. Though subject targeting is not possible on the Cambridge Chronicle website, we also recommend placing ads there to help brand the program to a broader audience. Search optimization on Yahoo and Google will reach consumers who are looking for information on energy, home improvement, climate change and other relevant issues. Strategic ad placements on Craig's List and Angie's List will reach consumers who are looking to buy new homes and may be considering home improvement options.
- **Utility Bills.** SmartPower's market research found that 71 percent of highly motivated consumers first learned about new, environmentally friendly energy products from inserts in their utility bills. Because consumers expect and look for information about energy programs in their utility bills, working with NStar to include a CEA insert in Cambridge utility bills presents an excellent opportunity to reach consumers.
- **Direct Mail.** During the N2N campaign, CEA-branded direct mail will be sent to home owners in targeted neighborhoods to raise awareness and increase response rates. The mail will include a motivational message and response mechanism driving residents to CEA's website, and will prime home owners to respond positively with approached by CEA canvassers and volunteers.
- **Public Radio.** Underwriting on WBUR-FM is a low-cost vehicle to quickly raise awareness of the program among Cambridge opinion leaders and the general public. While the ads will reach listeners beyond Cambridge, public radio listeners are a high-value audience that makes up for inefficiencies in radio advertising.
- **Newspapers.** Once the campaign in full swing – by the summer of 2008 – we recommend advertising in the City Weekly edition of the *Boston Globe*, which covers Cambridge. Ads in the real estate section will reach new home buyers – a market of consumers who are already thinking about making home



improvements and should be receptive to integrating “green” improvements. CEA may also want to place ads in the *Cambridge Chronicle* and *Cambridge TAB*, which have prominent real estate sections.

- **Text Messaging.** With an eye toward connecting people directly to CEA, we recommend integrating a mobile phone text message feature into the media mix. CEA advertising would include a message prompting people who want more information to text “CEA” into their mobile phones. The phone numbers from these text messages would then be delivered to the CEA database, and CEA staff would call these individuals to sign them up. This type of instant-response feature optimizes the impact of advertising.

Earned Media

Media coverage of CEA’s activities will be generated to raise awareness of the program and incent community leaders and volunteers to participate. The media most likely to cover the program in depth are the *Cambridge Chronicle*, *Cambridge TAB* and *Boston Globe*. Boston television stations and WBUR will also cover some stories. The earned media strategy will utilize special events and program benchmarks to generate media coverage. Examples of earned media opportunities include:

- Major event with Community Leaders and elected officials to kick off the campaign
- Launches of N2N and B2B campaigns, by neighborhood
- Opeds by community leaders encouraging others to participate
- Feature stories on Community Leaders’ home makeovers
- Launch of the Online Energy Calculator
- Feature story on an interesting campaign volunteer
- Launch of the Small Business Energy Savings Seminars
- Launch of the Cambridge Public Schools Energy Footprint project
- Announcements of community and business leaders reaching their goals
- Announcements of major benchmarks achieved (e.g., percentage of residents signed up by neighborhood)
- Announcements of awards to Community Leaders and volunteers



Timeline for Year One and Two

Timeframe	Activity
Year 2007	
August	Hire Outreach and Volunteer Coordinators
	Begin Recruiting 15 Community Leaders
	Develop Marketing and Communication Budget
September and October	Conduct Market Survey
	Create Consumer Oriented Website
	Create Marketing Materials
November	Launch Community Leaders Campaign
	Launch Consumer Oriented Website
December	Initiate CEA Direct Organizing of Larger Buildings & CHA
Year 2008	
January	Launch Small Business Campaign
April	Launch School Curriculum Project on Earth Day
	Finish Community Leaders Retrofits ?
	Direct Mail - Utility, Recycling, Small Business
May to August	Neighbor-to-Neighbor Outreach and Advertising Campaign
September	Evaluate Success of all Initiatives, Readjust Target
October	Host City Wide Celebration and Awards

