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December 2, 2013

Advice 4323-E  
(Pacific Gas and Electric Company ID U 39 E)

Public Utilities Commission of the State of California

Subject: PG&E's 2014 Marketing & Outreach Plan for the California Solar Initiative General Market and Multi-Family Affordable Solar Housing Programs

### Purpose

In compliance with Appendix A of Decision (D.) 07-05-047 and the subsequent Phase One Modification in D. 11-07-031, Pacific Gas and Electric Company (PG&E) hereby requests the Energy Division's approval of its 2014 Marketing & Outreach Plan (M&O Plan) for the California Solar Initiative (CSI) General Market and Multi-Family Affordable Solar Housing (MASH) programs in its service territory.

PG&E's proposed M&O Plan requests an annual budget of \$868,000 for CSI General Market and \$70,000 for MASH. In submitting these requests, PG&E sets forth a detailed justification for marketing and outreach (M&O) expenses deemed necessary.

Additionally in this M&O Plan, in accordance with the guidelines provided, PG&E includes the following items:

- A recap of 2013 CSI General Market M&O tactics;
- An outline of 2014 CSI General Market M&O goals and strategies;
- A detailed description of the 2013 M&O budget request and proposed timeline; and
- A request for funding for the M&O Plan for the MASH programs.

### Background

On May 24, 2007, the California Public Utilities Commission (CPUC or Commission) issued D.07-05-047, which established a process for approval of the Interim CSI M&O Plans. This decision stated that the interim process will remain in place until the Energy Division provides more complete guidance to the CSI Program Administrators (PAs) regarding CSI M&O activities after preliminary or Phase I issues were resolved. It also states that PAs shall update their Interim M&O Plan by sending a follow-up letter to the

Director of the Energy Division six months after the date of their initial letter, and six months thereafter.

On July 26, 2010, the CPUC's Energy Division Staff issued a Staff Proposal containing suggested modifications to the CSI program including establishing the Final M&O Plan. Subsequently, Decision 11-07-031 (The Decision) modified the Commission Decision (D.) 06-12-033 affecting the planned long-term M&O budget.

The issues surrounding the long-term and Final CSI M&O Plan were addressed on July 14, 2011 in The Decision. The Decision reaffirmed that the long-term CSI M&O budget established for General Market is \$15 million, split equally among the three PAs and effectively lifts the cap of an annual budget of \$500,000. The Decision directs the PAs continue to conduct M&O activities previously established as part of the "Interim" CSI M&O guidelines and leaves discretion for additional activities to the PAs under the guidance of the Energy Division.

PG&E submits this 2014 M&O Plan in accordance with this direction and under the new process for approval of marketing plans for the CSI General Market Program through this Advice Letter.

## 2014 California Solar Initiative Marketing and Outreach Plan

### I. Recap and Update of 2013 M&O Tactics

#### Commemoratory Community Event

PG&E celebrated the Martinez Unified School District as the 75,000th solar customer in our service area. A celebration event was held with PG&E executives, local politicians and industry experts in attendance to acknowledge this milestone event. Local press was also in attendance and PG&E leveraged internal resources to promote and announce event.

#### Integration

PG&E's web-based Solar Analysis Tool enables customers to assess bill impacts and investment return from a PV installation at a customer's home or business. In 2013, the tool was utilized at a rate of over 30,000 estimations per month. An estimation counted every time a user inputs data and receives the calculated outputs on bill impacts and financial performance. While the tool is a useful resource, PG&E has identified ways in which to make the user interface more customer friendly and is in the process of making upgrades to the tool.

## Energy House Calls

In 2013, PG&E went back to several of the families highlighted in the 2012 Energy House Calls, an online mini-reality style show featuring PG&E's residential energy efficiency, demand response and renewable programs, to share savings information and discuss deeper ways to save energy and money. One of the families featured in the 2013 update connected to the grid in September 2013. In this update, PG&E will promote solar and highlight savings statistics associated with our residential solar customers.

## Customer Outreach

PG&E launched a direct mail and email campaign to celebrate the success of the CSI Residential Program. Solar customers who participated in the program received a postcard or an email thanking them for their participation. The communication also shares savings information from the program and introduced solar thermal as an additional product that might be of interest to further their energy management journey.

## NEM Billing Outreach

PG&E started updating the Welcome Kits incorporating changes resulting from the NEM bills being launched in December 2013. The kits set customer's expectations about what happens after interconnecting their system, particularly as it relates to understanding NEM billing and provide a thorough overview of the process as well as explanations of key bill components.

## Industry Engagement--Organizational Memberships

PG&E continues to support and partner with key industry organizations that contribute to the success of solar and help facilitate improvements in the consumer market as well as reduce barriers within the solar industry. PG&E also participates in solar focused events and conferences that allow access to key influencers within the solar industry. PG&E feels strongly that it is important to actively engage with these events and organizations as they support and shape program and policy decisions that will drive solar adoption and ensure the success of CSI. These organizations include California Solar Energy Industries Association (CalSEIA), SolarTech, Solar Electric Power Association (SEPA) and Solar Sonoma County.

## Statewide Collaboration

PG&E continued its support and coordination with the CSI PAs on the monthly Go Solar California e-newsletter, a valuable source of information for customers interested in program changes, regulatory updates and relevant industry news and events. Starting this year, PG&E also began funding CCSE for a portion of the production and design

aspect of the newsletter. PG&E provided direct support in the form of content, news and process improvement ideas.

#### Intersolar Conference- Go Solar California

On July 9-11th, 2013, the statewide solar team attended Intersolar in San Francisco to generate awareness about statewide CSI, Solar Water Heating & Self Generation incentive programs and incentives. The exhibit booth included statewide branded program collateral and information and was staffed by subject matter experts from each program.

## II. 2014 M&O Goals and Strategies

In PG&E's territory the CSI-General Market Program was very successful with PG&E nearing the 100,000<sup>th</sup> solar customer coming online at the end of this year. In 2014, PG&E will be closing out the program and will begin reconciling final incentive payments. PG&E would like to be a trusted energy advisor for our customers and as such is committed to improving the overall solar customer experience, particularly post inspection. This commitment is one that PG&E has supported in previous years and 2014 efforts will further strengthen this commitment by guiding customers through the end to end process of going solar.

PG&E has identified the following strategies for 2014 in support of the CSI Program despite the lack of incentives available.

- Engage with solar industry to facilitate market improvements that reduce barriers to solar adoption.
- Improve the customer experience by providing adequate and helpful tools and resources to better set and manage the expectations of going solar
- Help customers make informed decisions about solar by providing clear and relevant information supporting the pre- and post- installation process, including NEM billing.

## III. Tactics & Activities

The following section outlines the M&O tactics and activities PG&E has identified for 2014 to support the above-mentioned strategies.

### A. Events

#### Commemoratory Community Event

PG&E would like to recognize and celebrate its 100,000<sup>th</sup> solar customer, a milestone expected in late December, 2013. The event would include members of the local

community and solar industry as well as solar customers, local and statewide politicians and PG&E executives. PG&E will invite local press as well as issue a press release to announce this accomplishment.

#### Ad-Hoc Events and Activities

As in 2013, PG&E proposes to set aside funding to consider opportunities on an ad-hoc basis that may arise such as new outreach needs, sponsorship opportunities or to address unanticipated issues or changes. PG&E will assess the feasibility of each opportunity in consultation with Energy Division staff to determine if it aligns with goals and strategies outlined above and the proper level of funding.

#### B. Customer Outreach

##### Targeted Outreach

PG&E would like to consider a pilot program that would involve working with parties, 3 like Critigen, to conduct solar mapping of the service area and incorporate customer data based on grid capacity to produce a report showing the feasibility to adopt solar. The pilot would involve outreach, potentially in the form of a bill insert, which would include specific customer reports. PG&E deployment of this tactic is pending results of similar efforts conducted by Southern California Edison.

##### Net Energy Metering (NEM) Billing Outreach

PG&E has identified the NEM process and the related billing as a confusion point for our solar customers. These learnings have come from customer research and focus groups PG&E has conducted over recent years and a high number of customer calls to our Solar Customer Service Center. To remediate this problem, PG&E would like to concentrate efforts on NEM billing education and communication. PG&E has identified the below tactics and activities to support these goals.

##### Bill Related Opportunities

New Customers: PG&E plans to update our NEM Welcome Kits to incorporate changes made to the NEM bills launched as part of PG&E's overall bill redesign initiative. The Welcome Kit provides a detailed explanation of the billing process and key bill components to newly interconnected customers. New NEM customers will begin receiving the redesigned bills in the first half of 2014.

Existing Customers: PG&E plans to communicate to customers already on a NEM rate about the transition to the new, consolidated bill. The objective of these NEM billing communications is to explain the reasoning for the new bill as well as the benefits, explain how to read the new bill and supply resource information for any questions. PG&E will also set expectations for when they will be receiving it.

## Additional Opportunities

In an effort to better serve solar customers, PG&E would like to go back to customers who provided input at the beginning stages of our bill redesign initiative to ensure the new bills meets their needs and concerns. This customer research would serve to confirm bill redesign efforts or identify gaps and areas for improvement for future efforts.

To help new PG&E solar customers further understand NEM billing from the start, PG&E proposes a new pilot program potentially consisting of outbound call efforts or Interactive Voice Response (IVR) efforts to customers' shortly after receipt of their bill. The goal of the NEM bill education pilot would be to help customers with initial understanding of their bill and answer any questions they may have.

### C. Collaboration

#### Statewide Collaboration

PG&E proposes to continue its participation in the creation and distribution of the statewide Go Solar Newsletter coordinated by the program administrator, California Center of Sustainable Energy.

#### Industry Engagement- Organizational Memberships

PG&E would like to continue its support of various industry organizations who are dedicated to improve the process of going solar. PG&E proposes to continue working with supporting organizations such as SEPA, SolarTech and CALSEIA.

#### Integration Efforts

PG&E continues to look at integration opportunities to promote demand response, energy efficiency and demand generation in a single tactic or communication. Tactics to support these efforts could include promoting solar in our Energy House Calls campaign, a mini-reality style show highlighting energy savings available through IDSM as well as the residential customer digital newsletter.

#### Website

To support all of the above mentioned activities, PG&E will refine and update the solar section of the PG&E website to meet the needs of a variety of new customers, existing customers and contractors in an easy and streamlined way.

#### Fixed Overhead and Labor

In order to continue to provide ongoing support and materials, PG&E requests a set aside budget for fixed costs and activities including, but not limited to, reprinting e

and new materials, regular web maintenance and updates, collateral management and fulfillment, etc. This will also include the necessary funding for adequate staff to support the marketing and outreach of the CSI program including a full time PG&E employee and support from other internal staff members and management as necessary.

#### IV. 2014 General Market M&O Budget

The table below consists of a summary of PG&E's 2014 General Market M&O tactics and the associated budgets that were described in more detail in the above section.

2014 General Market M&O Tactics Summary Cost

	Tactic	Budget
	Events	
1	Commemorator Community Event	\$10,000
2	Ad-Hoc Events and Activities	\$50,000
	Customer Outreach	
3	<u>Targeted Outreach</u> Solar Mapping Pilot	\$75,000
4	<u>NEM Billing Outreach</u> NEM Welcome Kits	\$50,000
5	Customer Research	\$45,000
6	NEM Billing Communications	\$100,000
7	NEM Bill Education Pilot	\$85,000
	Collaboration	
8	<u>Statewide Collaboration</u> Go Solar Newsletter	\$15,000
9	<u>Industry Engagement</u> Organizational Memberships	\$30,000
10	Integration Efforts	\$15,000
11	Website	\$93,000
12	Fixed overhead and Labor	\$300,000
	Total	\$868,000

#### 2014 MASH Marketing and Outreach Plan

##### I. Recap and Update of 2013 M&O Tactics

Virtual Net Energy Metering (VNEM) Education Package Distribution (Originally called Welcome to Mash Packet)

PG&E created a brochure on Virtual Net Metering that would meet the 2013 MASH objective of educating the customer and the larger CSI objective of improving the customer experience. The brochure is geared at helping new VNEM (MASH and General Market) customers what virtual net metering is, what the billing process is, what they will receive in the mail, the benefits of using MyEnergy and some bill callouts help them understand their bill and VNEM statement. The development took place in 2013 and is soon to wrap up and the mailing will take place in 2014.

## II. 2014 M&O Goals and Strategies

The M&O Plan for the MASH program will be focused on education and outreach to building occupants, building owners and contractors to achieve the following objectives:

- Improving customers' understanding of solar and the associated benefits, which along with energy efficiency help to reduce the costs for affordable housing occupants and result in maximum value of their solar system.
- Increase awareness of the MASH Program by building owners to drive additional participation in the program
- Educate new contractors on the program and existing contractors on program and incentive level changes occurring in 2014.

## III. Tactics & Activities

The following section outlines the M&O tactics and activities PG&E has identified that will help us meet these goals in 2014.

### VNEM Education Package Distribution

PG&E would like to distribute the new educational brochures that were developed in 2013 to both new and existing customers. The brochure is geared at helping new VNEM (MASH and General Market) customers understand what virtual net metering is, what the billing process is, what they will receive in the mail, the benefits of using MyEnergy and some bill callouts to help them understand their bill and VNEM statement.

### Building Owner and Tenant Awareness Materials

PG&E would like to create program awareness materials targeting new building owners and their tenants. These materials would include a promotional piece for building owners outlining program details and benefits as well as a separate piece to be shared with tenants on solar and the associated benefits of solar and of energy efficiency as a larger energy management approach. The charges would include design, printing and distribution of materials.



### Web Updates

PG&E plans to continue to update the MASH section of pge.com to include educational information on VNEM and 2014 program updates.

### Contractor Training

PG&E plans to continue to offer contractor training and recommends recording the training or offering a second training in the southern part of our service area. Contractors are essential in educating building owners on this program and would like to maximize their efforts by increasing the number of educated contractors and ensuring that they are aware of 2014 program updates.

### Fixed Overhead and Labor

PG&E would like to set aside the necessary funding for labor required to perform marketing and outreach for the MASH program. Much of the labor costs will be shared by other programs due to the integrated nature of PG&E's MASH outreach proposal.

### Ad-Hoc Events and Activities

PG&E is proposing setting funding aside to evaluate ad-hoc opportunities and address unanticipated issues and outreach opportunities that arise throughout the year.

## IV. 2014 MASH M&O Budget

The table below consists of a summary of PG&E's 2014 MASH M&O tactics and the associated budgets that were described in more detail in the above section.

2014 MASH M&O Tactics Summary Cost

	Tactics	Budget
1	VNEM Education Package Printing & Distribution	\$10,000
2	Building Owner and Tenant Awareness Materials	\$30,000
3	Web Updates	\$10,000
4	Contractor Trainings	\$ 5,000
4	Fixed Overhead and Labor	\$10,000
5	Ad-Hoc Events and Activities	\$ 5,000
	Total	\$70,000

Protests

Anyone wishing to protest this filing may do so by letter sent via U.S. mail, facsimile or E-mail, no later than December 23, 2013 which is 21 days<sup>1</sup> after the date of this filing. Protests must be submitted to:

CPUC Energy Division  
ED Tariff Unit  
505 Van Ness Avenue, 4<sup>th</sup> Floor  
San Francisco, California 94102

Facsimile: (415) 703-2200  
E-mail: EDTariffUnit@cpuc.ca.gov

Copies of protests also should be mailed to the attention of the Director, Energy Division, Room 4004, at the address shown above.

The protest shall also be sent to PG&E either via E-mail or U.S. mail (and by facsimile, if possible) at the address shown below on the same date it is mailed or delivered to the Commission:

Brian K. Cherry  
Vice President, Regulatory Relations  
Pacific Gas and Electric Company  
77 Beale Street, Mail Code B10C  
P.O. Box 770000  
San Francisco, California 94177

Facsimile: (415) 973-7226  
E-mail: PGETariffs@pge.com

Any person (including individuals, groups, or organizations) may protest or respond to an advice letter (General Order 96-B, Section 7.4). The protest shall contain the following information: specification of the advice letter protested; grounds for the protest; supporting factual information or legal argument; name, telephone number, postal address, and (where appropriate) e-mail address of the protestant; and statement that the protest was sent to the utility no later than the day on which the protest was submitted to the reviewing Industry Division (General Order 96-B, Section 3.11).

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<sup>1</sup> The 20-day protest period concludes on a weekend, therefore, PG&E is moving this date to the following business day.

Effective Date

PG&E requests that this Tier 2 advice filing become effective on regular notice, January 1, 2014 which is 30 calendar days after the date of filing.

Notice

In accordance with General Order 96-B, Section IV, a copy of this advice letter is being sent electronically and via U.S. mail to parties shown on the attached list and the service list for Rulemaking (R.) 12-11-005. Address changes to the General Order 96-B service list should be directed to PG&E's email address PGETariffs@pge.com. For changes to any other service list, please contact the Commission's Process Office at (415) 703-2021 or at Process\_Office@cpuc.ca.gov. Send all electronic approvals to PGETariffs@pge.com. Advice letter filings can also be accessed electronically at: <http://www.pge.com/tariffs>



Vice President, Regulatory Relations

cc: Service List R.12-11-005

# CALIFORNIA PUBLIC UTILITIES COMMISSION

## ADVICE LETTER FILING SUMMARY ENERGY UTILITY

MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No. Pacific Gas and Electric Company (ID U39 E)

Utility type:

ELC      ffi GAS

PLC      HEAT      WATER

Contact Person: Igor Grinberg

Phone#: (415) 973-8580

E-mail: ixg8@pge.com and PGETariffs@pge.com

### EXPLANATION OF UTILITY TYPE

ELC= Electric  
PLC= Pipeline

GAS= Gas  
HEAT= Heat

WATER Water

(Date Filed/ Received Stamp by CPUC)

Advice Letter (AL) #4323-E

Tier: 2

Subject of AL: PG&E's 2014 Marketing & Outreach Plan for the California Solar Initiative General Market and Multi-Family Affordable Solar Housing Programs

Keywords (choose from CPUC listing): Compliance

AL filing type: Monthly    Quarterly    Annual    One-Time    Other \_\_\_\_\_

If AL filed in compliance with a Commission order, indicate relevant Decision/Resolution # D.07#05-047 and D.11-07-031

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL: No

Summarized differences between the AL and the prior withdrawn or rejected AL:

Is AL requesting confidential treatment? If so, what information is the utility seeking confidential treatment for:

Confidential information will be made available to those who have executed a nondisclosure agreement: N/A

Name(s) and contact information of the person(s) who will provide the nondisclosure agreement and access to the confidential information: \_\_\_\_\_

Resolution Required? Yes    No

Requested effective date: January 1, 2014

No. of tariff sheets: N/A

Estimated system annual revenue effect (%): N/A

Estimated system average rate effect (%): N/A

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected: N/A

Service affected and changes proposed: N/A

Protests, dispositions, and all other correspondence regarding this AL are due no later than <sup>1</sup> 21 days the date of this filing, unless otherwise authorized by the Commission, and shall be sent to:

CPUC, Energy Division  
ED Tariff Unit  
505 Van Ness Ave., 4<sup>th</sup> Floor  
San Francisco, CA 94102  
EDTariff@cpuc.ca.gov

Pacific Gas and Electric Company  
Attn: Brian K. Cherry, Vice President, Regulatory Relations  
77 Beale Street, Mail Code B10C  
P.O. Box 770000  
San Francisco, CA 94177  
E-mail: PGETariffs@pge.com

<sup>1</sup> The 20-day protest period concludes on a weekend, therefore, PG&E is moving this date to the following business day.

PG&E Gas and Electric  
Advice Filing List  
General Order 96-B, Section IV

1st Light Energy	Douglass & Liddell	OnGrid Solar
AT&T	Downey & Brand	Pacific Gas and Electric Company
Alcantar & Kahl LLP	Ellison Schneider & Harris LLP	Praxair
Anderson & Poole	G. A. Krause & Assoc.	Regulatory & Cogeneration Service, Inc.
BART	GenOn Energy Inc.	SCD Energy Solutions
Barkovich & Yap, Inc.	GenOn Energy, Inc.	SCE
Bartle Wells Associates	Goodin, MacBride, Squeri, Schlotz & Ritchie	SDG&E and SoCalGas
Braun Blasing McLaughlin, P.C.	Green Power Institute	SPURR
CENERGY POWER	Hanna & Morton	San Francisco Public Utilities Commission
California Cotton Ginners & Growers Assn	In House Energy	Seattle City Light
California Energy Commission	International Power Technology	Sempra Utilities
California Public Utilities Commission	Intestate Gas Services, Inc.	SoCalGas
California State Association of Counties	K&L Gates LLP	Southern California Edison Company
Calpine	Kelly Group	Spark Energy
Casner, Steve	Linde	Sun Light & Power
Center for Biological Diversity	Los Angeles Dept of Water & Power	Sunshine Design
City of Palo Alto	MRW & Associates	Tecogen, Inc.
City of San Jose	Manatt Phelps Phillips	Tiger Natural Gas, Inc.
Clean Power	Marin Energy Authority	TransCanada
Coast Economic Consulting	McKenna Long & Aldridge LLP	Utility Cost Management
Commercial Energy	McKenzie & Associates	Utility Power Solutions
County of Tehama - Department of Public Works	Modesto Irrigation District	Utility Specialists
Crossborder Energy	Morgan Stanley	Verizon
Davis Wright Tremaine LLP	NLine Energy, Inc.	Water and Energy Consulting
Day Carter Murphy	NRG Solar	Wellhead Electric Company
Defense Energy Support Center	Nexant, Inc.	Western Manufactured Housing Communities Association (WMA)
Dept of General Services	North America Power Partners	
Division of Ratepayer Advocates	Occidental Energy Marketing, Inc.	