

## PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3298



March 21, 2012

**Advice Letter 3998-E**

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

**Subject: 2012 California Solar Initiative Marketing and Outreach Plans**

Dear Mr. Cherry:

On January 31, 2012, PG&E submitted plans for marketing the California Solar Initiative in Advice Letter 3998-E. PG&E's advice letter received timely comments from two parties, Solar Sonoma County<sup>1</sup> and the Division of Ratepayer Advocates (DRA.) The issues raised by the parties involve requests that PG&E consider more robust partnerships with regional solar organizations that compliment the marketing and outreach goals of the CSI program.

In comments, Solar Sonoma County explained that while it has had the support of PG&E as a partner in past outreach campaigns, the 2012 CSI marketing plans did not include any support for this organization. Solar Sonoma County submitted a business/marketing plan for 2012 that demonstrated the work it was performing in partnership with the U.S. Department of Energy and SolarTech to streamline solar permitting costs and processes. In PG&E's proposed plan, money to support permitting initiatives is provided to SolarTech, but not to Solar Sonoma County.

DRA's comments acknowledged that PG&E provided support for large solar organizations under the category of "Industry Engagement,"<sup>2</sup> but that given the size of its territory, PG&E's support for the educational and outreach efforts of more locally based solar organizations was not sufficient to achieve the market transformation goals of the CSI program.

On March 22, 2012, Energy Division (ED) staff, Amy Reardon, spoke to Elissa Pollock and Jessica Tellez from PG&E's Solutions Marketing team about the comments. During this discussion, PG&E staff explained that the \$25,000 budget

---

<sup>1</sup> Solar Sonoma County submitted a protest, however the protest is rejected pursuant to G.O. 96-B Section 7.5.1. Instead, staff considers the issues raised by Solar Sonoma County to be comments germane to PG&E's CSI marketing plan.

<sup>2</sup> PG&E's proposed budget for Industry Engagement is \$50,000 to be allocated among SEPA, CalSEIA and SolarTech.

category labeled “Ad Hoc Opportunities” was intended to be spent on, among other things, supporting the efforts of local solar groups whose missions compliment the goals of the CSI Program. Such goals include marketing to consumers and end-users, supporting the solar industry and facilitating efforts to reduce installed cost of systems.<sup>3</sup> PG&E stated that they intended to work with Energy Division to establish criteria by which solar groups’ proposals could be evaluated and supported.

On February 29, 2012, ED staff suspended AL 3998-E in order to consider other issues related to Integrated Demand Side Management activities. ED staff participated in a conference call with PG&E and other IDSM stakeholders, where it was determined that no additional funds need to be allocated to IDSM in PG&E’s 2012 Marketing and Outreach Plans.

On March 6, 2012, ED staff met with PG&E and Solar Sonoma County to examine areas that could be leveraged to promote and facilitate solar deployment in Northern California. The parties decided at this meeting to continue discussions and develop plans for support and coordination.

Thus, the above-referenced advice letter is effective February 29, 2012.

Sincerely,

A handwritten signature in cursive script that reads "Edward F. Randolph".

Edward F. Randolph, Director  
Energy Division

---

<sup>3</sup> Decision11-07-031, Section 8, p.55.

January 30, 2012

**Advice 3998-E**

(Pacific Gas and Electric Company ID U 39 E)

Public Utilities Commission of the State of California

**Subject: PG&E's 2012 California Solar Initiative (CSI) Interim Marketing and Outreach (M&O) Plan****Purpose**

In compliance with Appendix A of Decision (D.) 07-05-047 and the subsequent Phase One Modification in Decision (D.) 11-07-031, Pacific Gas and Electric Company (PG&E) hereby requests Energy Division approval of its 2012 M&O Plan (Plan) for the California Solar Initiative General Market (CSI) and Multi-Family Solar Housing (MASH) programs in its service territory.

PG&E's proposed Plan requests an annual budget of \$875,000 for CSI General Market and \$31,000 for MASH. In submitting these requests, PG&E sets forth a detailed justification for marketing and outreach expense deemed necessary.

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

- A recap of 2011 CSI General Market M&O tactics;
- An outline of 2012 M&O goals and strategies;
- A detailed description of the 2012 M&O plan specifying each proposed M&O tactic including a summary of the activities requested to carry over from 2011;
- A summary of the 2012 M&O tactics and funding request for the CSI General Market program including total budget and proposed timeline; and
- A request for funding for M&O Plan for the Multifamily Affordable Solar Housing (MASH) program.

**Background**

On May 24, 2007, the California Public Utilities Commission (CPUC) issued D. 07-05-047, which established a process for approval of the Interim CSI M&O Plans. The 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 every six months thereafter.

### **Tariff Revisions**

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. The issues surrounding the long-term and final CSI M&O plan were addressed on July 14, 2011 in Decision (D.) 11-07-031. This decision reaffirmed that the long-term CSI M&O budget established for the 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 to 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 2012 M&O Plan in accordance with this direction and under the new process of obtaining yearly approval of marketing plans for the CSI General Market Program through an Advice Letter submittal.

### **Recap of 2011 M&O Tactics**

Below is a detailed recap of the 2011 M&O tactics which PG&E obtained approval for in early 2011. All of these tactics have either been completed or will be requested to be transferred in the 2012 M&O plan.

#### **Education and Training—Live and Online Classes**

In 2011, PG&E offered a comprehensive set of educational opportunities and was able to reach hundreds of people through participation in PG&E classes. Courses were designed to help consumers make informed purchase decisions related to solar as well as help contractors successfully participate in the CSI program. In addition, PG&E has cast a wider net offering additional courses focused on issues related to the solar marketplace. Throughout the year, PG&E continually refreshed its curriculum to ensure the most relevant topics were presented and the objectives of the course were met for participants.

PG&E's webinars were done as a "Solar Noon" series with a set schedule consisting of online classes happening twice a week during the noon lunch hour to maximize participation. In addition to regular offerings, there were other topics that emphasized understanding the solar billing process and continuing to streamline the end to end process of going solar. PG&E also partnered with CalSEIA to offer courses focused on system safety and maintenance for solar contractors and consumers as well as consumer protection topics, including information about ethical sales and business practices. PG&E looks forward to building on this success in 2012 and reaching even more customers and industry professionals in a more targeted way.

## **Website Revamp (Financial and Contractor Resource Webpages)**

Many of our customers look to PG&E as a trusted energy advisor when considering their energy management options, particularly when it comes to solar and other renewable energy options. This is evident from the more than 250,000 customers who visit the solar-related pages on pge.com each year. In an effort to capitalize on this opportunity and increase the conversion rate of customers who already engage with PG&E online, PG&E undertook an extensive effort to improve the website with updated information and tools. CSI-Thermal co-funded the the revamping of the PG&E's solar webpages.

The update focused on a number of key changes to help customers understand the process and overcome key barriers to going "solar" (photovoltaic or solar water heating (SWH)). This included highlighting all renewable technology options (not just solar PV), creating an information center by way of dedicated webpages focused on all of the available financial options (Financial Resource Center) and information for finding and engaging a contractor (Contractor Resource Center)—including promotion of the contractor features on the California Solar Statistics (CSS) website, comparing bids, the dos and don'ts of purchasing solar/SWH, etc. In addition to these improvements, PG&E took the opportunity to also cross-sell other products and services, such as Energy Efficiency (EE), in the spirit of Integrated Demand Side Management (IDSM).

A pre- and post-survey was done to establish a benchmark for these efforts. The data collected will be used to inform PG&E of additional future improvements to ensure customers find the information they need and have an optimal customer experience on PG&E's solar webpages.

## **AB 920 Customer Communications and Web Support**

Assembly Bill 920 (AB 920), passed in late 2009, provided a compensation option to net energy metering (NEM) customers with excess generation. PG&E completed a series of communications to educate customers about this important change in 2011. The initial communication, which began in early 2010, informed NEM customers about the new program. Then starting in January 2011, upon true-up, additional information was provided to customers about the legislation and the pending CPUC decision that would determine the compensation rate and how it would be implemented.

In advance of the final decision on AB 920, a customer communication plan was developed to ensure impacted NEM customers were well informed about AB 920 including the differences between NEM credits and AB 920 compensation. Two types of customers were identified for communication: net generators, who are eligible for compensation and net consumers (no excess generation) with a NEM credit, who may mistakenly believe they are eligible for compensation. Additionally, PG&E also identified highly impacted customers—customers with the highest NEM credits and business customers who are net generators with a NEM credit—for additional outreach since they potentially have incorrect expectations regarding the compensation amount.

Since implementation of the compensation option in October 2011, PG&E has continued sending communications to net generators including a personalized letter and brochure. The letter explains how Net Surplus Compensation (NSC) works and advises the customer of their eligibility. A brochure was also added that provides an explanation about how to understand and calculate their compensation as well as where to find the information on the NEM statement and regular PG&E bill. The communication to net consumers with a NEM credit, but no excess generation, includes a personalized letter informing them that they are not currently eligible for NSC and explains the difference between NEM credits and compensation for net generation. For additional support, the mailers encourage customers to visit PG&E's comprehensive AB 920 website for Frequently Asked Questions and an educational video on AB 920.

After the initial launch of mailers, an email follow-up was sent to customers who had tried-up prior to the implementation of AB920 to reinforce the key messages of the letter. Additionally upon implementation, customers in the highly impacted group received a telephone call to ensure they understood the details of AB 920 and NSC.

### **Industry Engagement—Conference, Events, Forums and Memberships**

PG&E believes that engaging with the solar industry provides PG&E with the opportunity to share views and perspectives with key stakeholders and decision makers that shape the future of the solar market in California. As a result, PG&E is in a better position to understand the positions of these stakeholders as it provides input on items that are important to the success of CSI (policies, regulation, standards, etc). Moreover, it provides brand awareness for Go Solar California as well as an opportunity to promote the suite of renewable programs available including the CSI program. Below are some of the highlights of PG&E's activities with the solar industry:

#### *Organization Memberships*

PG&E is a member of the following organizations: California Solar Energy Industries Association (CalSEIA), Solar Electric Power Association (SEPA), SolarTech.

#### *SolarTech's Leadership Summit*

The Leadership Summit provided a unique opportunity for PG&E to engage with other industry leaders and participate in ongoing dialogue about key issues relating to solar and the CSI program. In fact, all of the CSI PAs including PG&E, participated in a panel discussion focused on the CSI program—"California Solar Initiative Roundtable: Cheaper, Better, Faster? What can CSI Program Administrators do?" Other facets of the Summit were focused on driving key industry initiatives aimed at removing key roadblocks to solar PV adoption. Such efforts around permitting, cost reduction and streamlined processes align with the overarching goals and objectives of the CSI Program and thus merit PG&E support.

### *Permitting and Interconnection Forums*

PG&E sponsored three Permitting and Interconnection Forums in conjunction with strategic industry partners. Two of the forums were a collaboration with Solar Sonoma County and the third forum was done in conjunction with SolarTech. The forums were open to building officials, contractors and other key stakeholders within the realm of permitting. Speakers from various organizations presented on the issues surrounding permitting and interconnection and engaged attendees on the issues face to face. The goal was to allow attendees from various geographies to share best practices and process improvements with each other to foster permitting improvements. Unlike previous forums, in 2011 the scope was expanded beyond Solar photovoltaic to also include Solar thermal, thereby providing greater awareness of thermal permitting issues and creating efficiencies by including both topics in one forum. In addition, key issues were uncovered such as resource constraints at the city and county level, varying documentation requirements in different jurisdictions and others that could be leveraged for future discussions of next steps in overcoming the permitting challenges.

### *Event and Conference Participation and Leadership*

In 2011, PG&E participated in key solar-related conferences and other local events throughout its service territory. PG&E lead the statewide presence at Intersolar North America in July, which was attended by over 40,000 individuals in the solar industry including manufacturers, integrators, contractors and consumers. PG&E also maintains a community and professional presence at various events, where solar is often showcased and the CSI program is promoted through the distribution of materials and speaking engagements. PG&E has also provided support to other CSI PAs by way of staffing and materials at key conferences outside of PG&E's service area.

### **Monthly Go Solar Newsletter**

In 2011, PG&E continued to provide support for the monthly Go Solar newsletter by contributing program related updates such as the step changes within PG&E territory, relevant articles and information on solar and the latest solar news and events. PG&E has also supported the newsletter by copyediting and developing a strategic approach to maximizing the effectiveness of the newsletter in the future. Recent suggestions included conducting a survey to gather insights about the desired content and frequency of the newsletter from its readers.

### **Customer Testimonial Videos**

Due to the focus on the billing customer outreach needs as a result of the implementation of AB 920, PG&E decided not to pursue doing customer testimonial videos. Additionally, PG&E believes resources would be better spent improving existing information and tools to simplify the end to end process of going solar for consumers.

## **Refresh of Existing Collateral**

PG&E collaborated with our statewide PA counterparts to update existing materials containing out of date and incorrect information about NEM billing (due to AB920 changes), incentives and more. PG&E is currently in the process of reviewing and updating the Consumer Guide. PG&E has made various suggestions to streamline its content and make it more consumer-focused and friendly.

## **Safety and Maintenance Guide**

Due to the focus on the billing customer outreach needs as a result of the implementation of AB 920, PG&E decided not to pursue developing a Safety and Maintenance Guide. However, PG&E did partner with CalSEIA to host webinars on the topic and will be exploring including such information in the Welcome to Solar kits that will be developed in 2012.

## **Solar Analysis Tool/Calculator**

In mid-2011, PG&E launched a Solar Analysis Calculator on the solar section of the pge.com website. This tool provides personalized information on the financial implications of going solar, similar to the Clean Power Estimator tool on GoSolarCalifornia.com. This customer friendly tool allows consumers the opportunity to assess the financial feasibility of solar and contains a number of additional features that allow for further analysis of a home's or business' solar potential. To provide a more accurate estimate, the tool prompts users for several key customer specific inputs before providing the results. One of the more significant features is that it contains an Energy Efficiency component that allows the user to indicate the level of energy savings to be achieved through energy efficiency with a direct link to the energy audit and determine its overall impact on the solar PV system (cost and size reduction).

## **2012 CSI M&O Goals and Strategies**

PG&E continues to look for opportunities to streamline the marketing and outreach efforts for the CSI program while optimizing its effectiveness. Given, the current status of the CSI program in PG&E's territory (Residential is in Step 9 and Non-Residential is effectively in Step 10 after 5 program years), one could conclude that awareness remains high. As a result, the M&O activities in 2012 are focused on further simplifying the process of going solar for consumers and ensuring post-installation customer satisfaction through education.

To support the overarching CSI Program goals, PG&E will be utilizing the following marketing strategies for 2012:

- Provide improved tools and information to enable customers to go solar and to enhance their overall experience.

- Improve customers' understanding and set better expectations of the solar experience post-installation by providing better education and resources.
- Engage and support solar industry organizations that facilitate market improvements and reduce barriers to solar adoption.

PG&E has strategically determined specific M&O tactics that align with the strategies outlined above. The following activities were decided upon to be the most effective and cost-efficient tactics to achieve these goals for 2012.

### **2012 CSI M&O Tactical Plan**

#### **Customer Research**

##### *Existing Solar Customers*

PG&E had proposed conducting customer research in 2011, in an effort to better understand solar customers' needs and concerns about solar post-installation and build upon some of the information uncovered by the measurement and evaluation (M&E) studies regarding customer satisfaction. However, due to efforts to support AB 920 communications, PG&E did not conduct the research. In 2012, PG&E would like to take a comprehensive deep dive into the core issues surrounding Net Energy Metering (NEM) billing and explore potential solutions to provide a better customer experience, given the inherent complexity in the NEM process. PG&E would like to take a phased approach to the customer research with a qualitative study followed by a quantitative study.

For the first phase, PG&E is proposing to do focus groups with existing solar customers with two primary objectives:

- Gain insights into customers' existing understanding of NEM, how they came to that understanding and their primary concerns/confusion with the structure of NEM and existing bills.
- Understand what the optimal NEM billing experience would be from a customer's point of view including what information they would like to see on their bill and how it would be presented.

PG&E would take the learnings from this research to inform customer communication and outreach activities, particularly the design and content of the Welcome to Solar Kits (see below) and other supporting NEM materials. In the second phase, PG&E would conduct a pre and post-study study to gauge the effectiveness of the new materials developed. This will ensure PG&E can address concerns about NEM and provide clarity around areas of confusion for customers. Additionally, PG&E is in the process of redesigning the regular energy statements and expects to leverage these efforts as PG&E continues to look for opportunities to be more cost-effective and simplify the NEM bills in the future.

PG&E will first determine the most appropriate method to engage its customer base and minimize costs. Upon completion of the research, results can be shared with the Energy Division and the other PAs to leverage the findings for the benefit of all solar customers in California.

### *New Customers*

Going solar requires not just a large financial investment but typically an investment of time to understand all of the steps involved in getting your system installed. From having a basic understanding of solar and finding a contractor to applying for the incentive and interconnecting the system, there is a certain path that customers will follow. While our role as a trusted energy advisor and program administrator is to simplify this process for consumers, PG&E must also help lead the customer through this journey to ensure expectations are met

In order to gauge our customers' base knowledge of the steps involved in going solar, PG&E would like to conduct qualitative customer research with customers that are interested in solar, but have not completed their installation. By understanding a customer's purchase making decision process when it comes to solar, PG&E will help better manage their expectations and improve the information and resources PG&E provides. The insights gained can also be leveraged by the CSI Program Administrators to make the suite of collateral more effective for consumers.

### **Welcome to Solar Kits**

PG&E had proposed developing a Welcome to Solar Kit that would be mailed to all new solar customers and would like to pursue this tactic in 2012. This robust mailer would ensure customers have a clear understanding of the nuts and bolts about post-program and post-installation elements. A major component objective of this kit will be providing a thorough understanding of the Net Energy Metering (NEM) billing process.

The customer research PG&E will conduct, as described above, will inform the design, messaging and specific content of the kit. Currently, PG&E is proposing the following components:

- "Welcome to Solar Letter"
- "Basic Net Energy Metering Guide" with information explaining how the concept of NEM works, rate structure components, AB 920, etc.
- "How to Understand Your Bill" this would be a step by step breakdown of the bill and how to understand it, etc.
- "Useful Information" information relating to safety, maintenance and monitoring of the generating systems.
- "Other Resources and Tools" such as the Go Solar California and PG&E websites, the Solar Customer Service Center toll-free phone number and information related to other IDSM PG&E program offerings (Energy Efficiency, Demand Response, etc).

## **NEM Education Efforts**

The Net Energy Metering (NEM) billing process is often cumbersome and confusing for solar customers, given its complexity. It is difficult for customer to understand how NEM works including generation versus consumption and the associated charges and credits. While PG&E has taken several steps to demystify the NEM billing process, ongoing inquiries to the call center about billing related questions and concerns have lead PG&E to embark on providing further outreach to help customer understand solar post-installations. A key step is education to set the proper expectations and further mitigate against customer dissatisfaction with the NEM process. These tactics are outlined below:

### *Communication to Existing Solar Customers about New NEM Materials*

PG&E will leverage the new materials that are developed as part of the Welcome to Solar Kits for newly interconnected customers for PG&E's existing installed base of 60,000+ customers. Many of the components of the welcome kit will be useful for existing customers and PG&E plans to re-purpose the welcome kit materials for a direct mailer to these customers.

### *Educational NEM Tutorial/Video*

In the 2011 M&O plan, PG&E proposed creating an educational video on the net energy metering (NEM) billing process and would like to complete this tactic in 2012 as part of the other NEM outreach efforts being proposed below. The tutorial would be a step by step tutorial that explains how the NEM process works and takes the customer through each of the components that make up the program. To make sure it would be a valuable resource the content would be informed by the results of the customer research. This educational video would live on the PG&E website and be accessible on-demand at any time. It could also be promoted in the proposed Welcome to Solar Kit and any solar related billing communications.

### *NEM Contractor Factsheet*

PG&E proposes developing a factsheet for solar contractors to educate their clients (PG&E's customers) about the basics of NEM billing and what to expect after installation. Contractors are often the first point of contact with customers interested in solar and can serve as a resource to help set the expectations of what happens post-installation. This factsheet will used by contractors to educate customer about NEM and help avoid any potential misrepresentations. Ultimately, it allow contractors to encourage customers to learn more about the NEM program and how it works upon making the purchase decision.

### *NEM Statement Language Changes*

PG&E would like to incorporate AB 920 messaging into customer's NEM Statements rather than providing this information in a separate mailer, in an effort to reduce confusion and be more cost-effective. PG&E explored this option when implementing AB 920 communications, but due to timing constraints was not able to execute it in this manner. Additionally, PG&E would like to take the opportunity to examine the existing language in the current NEM Statements and provide more customer friendly language to help consumers better understand their bills.

### *NEM Training Workshops*

PG&E will be organizing and hosting 2-3 NEM Workshops for our Business Representatives. Due to the added complexity of the non-residential rate schedules, business customers often require personalized service to get an in-depth explanation of NEM billing and AB920. This will allow PG&E business account representatives to better educate their customers on NEM and more effectively address their billing related inquiries.

### **Business Case Studies**

In 2011, PG&E had proposed building 2-3 solar case studies specifically tailored towards business customers that can be leveraged by PG&E's business account representatives and managers. However, due to the uncertainty that existed in 2011 regarding the future availability of Non-Residential CSI program, PG&E chose to delay the development of the case studies. Now that the Non-Residential p program has reopened with additional funds, PG&E would like to complete this tactic in 2012.

Within PG&E service area, there have been several prominent PV installations that could serve as prime examples of solar success stories for these case studies. PG&E will determine which business load profiles have the highest propensity to go solar and the impacts PV would have. The case studies will emphasize incorporating energy efficiency and other energy management options with solar. The information would not only highlight the key financial and environmental benefits of solar, but would also demonstrate the growing commitment of non-residential customers to find a green way of doing business. The case studies will be made available online and distributed at key events to help customers understand the value specific to certain customer segments.

### **Solar Analysis Tool/Calculator**

Although PG&E has already completed work on the Solar Analysis Tool, PG&E would like funding to cover the annual licensing fee due to the vendor. The licensing fee is determined by the number of visitor utilizing the Solar Calculator in the previous year.

## **Training and Education**

PG&E continues to view training and education as a critical tool for customers to go solar and for contractors to participate in the CSI program. Since the inception of the program, PG&E has built an extensive portfolio of online and in-person classes. In addition to the core basic classes such as Steps to Installing Solar, the CSI workshop for contractors, PG&E starts each year by evaluating the needs of our customers and the feedback received from past courses. This helps PG&E determine the proper classes and curriculum needed while leveraging materials already supported on our website and Go Solar California.

This year, PG&E will be focus more effort on streamlining our offerings and ensuring the topic and content for each course is relevant to the path the customer or contractor would take to participate. PG&E will also start to make some classes available on-demand to offer the most convenience for consumers and contractors. Lastly to maximize the participation and effectiveness of all of the educational opportunities offered, PG&E will do outreach through an email campaign to better promote PG&E's classes to the target audiences for the given content.

## **Industry Engagement**

PG&E has found strategic alliances and partnerships to be valuable in helping to strive towards the shared goals of driving solar adoption and overcoming market barriers. PG&E has forged such relationships for the past several years and proposes continuing these as the CSI program moves into its sixth year in order to foster a growing and thriving solar industry.

Additionally, key solar conferences, events and speaking opportunities, give PG&E a voice in supporting improvements within the solar arena in California. It also allows PG&E to showcase one of the more prominent solar incentive programs in the country and engage with other industry professionals.

### *Memberships*

The organizations PG&E would like to continue to support include SEPA, CalSEIA and SolarTech.

### *Conferences*

On behalf of Go Solar California and the other CSI PAs, PG&E plans to continue to lead these efforts with Intersolar North America in July 2012 in San Francisco, CA.

### *Ad-Hoc Opportunities*

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

determine the feasibility of the opportunity and whether it aligns to further the goals outlined above for 2012.

### **Go Solar California Newsletter**

PG&E will continue to contribute content and ideas for the monthly Go Solar California newsletter by providing updates on the CSI program, specific PG&E and other solar related news and events and other relevant articles. PG&E is also interested in exploring changes to the frequency and content of the e-newsletter to optimize resources and provide the best experience for our readers. PG&E will work with the other PAs and the Energy Division to make suggestions for improvements and make the newsletter an even more effective communication vehicle.

### **Fixed Overhead**

PG&E would like to set aside necessary funding for fixed costs associated with the marketing and outreach for the CSI program. Such costs include, but are not limited to, printing existing and new materials, regular web maintenance and updates, collateral management and fulfillment, etc.

### **Labor**

PG&E would like to set aside the necessary funding required to perform marketing and outreach for the CSI program. This includes labor costs for one full time employee and support from other staff members and management.

### **Summary of 2012 CSI M&O Tactics, Budget and Timeline**

#### Summary and Budget

The table below consists of a summary of PG&E's 2012 M&O tactics that were described in detail in the above section and the associated budgets.



## **2012 MASH Goals and Strategies**

The M&O Plan for the Multifamily Affordable Solar Housing (MASH) program will be focused on outreach to building occupants to achieve the following objectives:

- Improving customers' understanding of the VNEM billing process through education.
- Help customers maximize the value of solar by providing other energy management solutions through an integrated approach.

## **2012 MASH M&O Tactical Plan**

### **Welcome to MASH Package**

MASH program staff has identified a need for customers living in MASH-enrolled buildings to better understand the overall process, benefits and implications of the program. As such, PG&E would like to leverage its creation of the "Welcome to Solar" package to create a "Welcome to MASH" package. This package would include several pieces of educational collateral including:

- "Welcome to MASH" letter with information explaining how the concept of Virtual Net Energy Metering works, the benefits of solar energy, etc.
- "Integrated Demand Side Management" with information related to PG&E's IDSM program offerings (Energy Efficiency, Demand Response, etc.) and how they can help customers get the most from their solar installations and save on energy costs.
- "Understanding Your VNEM Bill" with an explanation of the VNEM bill

Associated costs for this package include the creation of the "Welcome to MASH" letter, "Understanding Your VNEM Bill" piece and printing and postage. The creation and printing of the "Integrated Demand Side Management" piece will be a shared cost between the IDSM programs available to low-income customers.

### **Phone Survey**

PG&E would like to allocate funding to perform an assessment of post-VNEM education to determine the customers' satisfaction with the MASH collateral. This survey will serve to influence any changes needed in the collateral to make it more understandable or effective.

### **Web Updates**

PG&E would like to update the MASH page at pge.com to include the educational information on VNEM. Additionally, PG&E would like to use MASH outreach dollars to partially fund the creation of a webpage within pge.com that will serve as a central resource of IDSM offerings available for low-income property owners and managers.

## Customer Research

PG&E has identified the need to better understand low-income customers' preference in messaging and education on programs and rates. In light of that need, PG&E is proposing to leverage the Energy Savings Assistance (ESA) Program's Household Segmentation study and funds to be used for deeper dives into the data it provided. These costs will be covered by the ESA Program as it investigates messaging and education related to IDSM and all low-income programs available to low-income customers.

## 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 Opportunities

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

## Summary of 2012 MASH M&O Tactics, Budget and Timeline

### Summary and Budget

The table below consists of a summary of PG&E's 2012 MASH M&O tactics and the associated budgets that were described in more detail in the above section.

	<b>2012 MASH M&amp;O Tactics Summary</b>	<b>Cost</b>
1	Welcome to MASH Package	\$10,000
2	Phone survey	\$5,000
3	Customer Research	-
4	Web Updates	\$1,000
5	Labor	\$10,000
6	Ad Hoc	\$5,000
	<b>TOTAL</b>	<b>\$31,000</b>

## Proposed Activity Calendar

MASH M&O	Q1			Q2			Q3			Q4		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Local PG&E Activities												
Welcome to MASH Package												
Phone survey												
Customer Research												
Web Updates												

**Protests**

Anyone wishing to protest this filing may do so by letter sent via U.S. mail, by facsimile or electronically, any of which must be received no later than **February 21, 2012**, which is 22 days<sup>1</sup> after the date of this filing. Protests should be mailed to:

CPUC Energy Division  
 Tariff Files, Room 4005  
 DMS Branch  
 505 Van Ness Avenue  
San Francisco, California 94102

Facsimile: (415) 703-2200  
 E-mail: [jnj@cpuc.ca.gov](mailto:jnj@cpuc.ca.gov) and [mas@cpuc.ca.gov](mailto:mas@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 also should be sent via U.S. mail (and by facsimile and electronically, if possible) to PG&E at the address shown below on the same date it is mailed or delivered to the Commission:

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

Facsimile: (415) 973-6520  
 E-mail: [PGETariffs@pge.com](mailto:PGETariffs@pge.com)

<sup>1</sup> The regular 20-day protest period ends on a non-business day so the protest period end date has been moved to the next regular business day.

**Effective Date**

PG&E requests that this Tier 2 advice filing become effective on regular notice, **February 29, 2012** 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 parties on the service list for R.10-05-004. Address changes to the General Order 96-B service list should be directed to PG&E at email address [PGETariffs@pge.com](mailto: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](mailto:Process_Office@cpuc.ca.gov). Send all electronic approvals to [PGETariffs@pge.com](mailto:PGETariffs@pge.com). Advice letter filings can also be accessed electronically at: <http://www.pge.com/tariffs>

A handwritten signature in cursive script that reads "Brian Cherry". To the right of the signature, there is a small, less legible handwritten mark that appears to be "1/30/12".

Vice President, Regulation and Rates

Attachments

cc: Service List R.10-05-004

# 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       GAS  
 PLC       HEAT       WATER

Contact Person: Greg Backens

Phone #: 415-973-4390

E-mail: gab4@pge.com

### EXPLANATION OF UTILITY TYPE

ELC = Electric      GAS = Gas        
PLC = Pipeline      HEAT = Heat      WATER = Water

(Date Filed/ Received Stamp by CPUC)

Advice Letter (AL) #: **3998-E**

**Tier: 2**

Subject of AL: **PG&E's 2011 California Solar Initiative (CSI) Interim Marketing and Outreach (M&O) Plan**

Keywords (choose from CPUC listing): Compliance, Customer Owned Generation

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, D.11-07-031

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

Summarize differences between the AL and the prior withdrawn or rejected AL: N/A

Is AL requesting confidential treatment? If so, what information is the utility seeking confidential treatment for: No

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: N/A

Resolution Required?  Yes  No

Requested effective date: **February 29, 2012**

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 20 days after the date of this filing, unless otherwise authorized by the Commission, and shall be sent to:

**CPUC, Energy Division**

**Tariff Files, Room 4005**

**DMS Branch**

**505 Van Ness Ave., San Francisco, CA 94102**

**[jnj@cpuc.ca.gov](mailto:jnj@cpuc.ca.gov) and [mas@cpuc.ca.gov](mailto:mas@cpuc.ca.gov)**

**Pacific Gas and Electric Company**

**Attn: Brian K. Cherry, Vice President, Regulation and Rates**

**77 Beale Street, Mail Code B10C**

**P.O. Box 770000**

**San Francisco, CA 94177**

**E-mail: [PGETariffs@pge.com](mailto:PGETariffs@pge.com)**

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

AT&T	Department of Water Resources	North America Power Partners
Alcantar & Kahl LLP	Dept of General Services	North Coast SolarResources
Ameresco	Douglass & Liddell	Northern California Power Association
Anderson & Poole	Downey & Brand	Occidental Energy Marketing, Inc.
BART	Duke Energy	OnGrid Solar
Barkovich & Yap, Inc.	Economic Sciences Corporation	Praxair
Bartle Wells Associates	Ellison Schneider & Harris LLP	R. W. Beck & Associates
Bloomberg	Foster Farms	RCS, Inc.
Bloomberg New Energy Finance	G. A. Krause & Assoc.	Recurrent Energy
Boston Properties	GLJ Publications	SCD Energy Solutions
Braun Blaising McLaughlin, P.C.	GenOn Energy, Inc.	SCE
Brookfield Renewable Power	Goodin, MacBride, Squeri, Schlotz & Ritchie	SMUD
CA Bldg Industry Association	Green Power Institute	SPURR
CLECA Law Office	Hanna & Morton	San Francisco Public Utilities Commission
CSC Energy Services	Hitachi	Seattle City Light
California Cotton Ginners & Growers Assn	In House Energy	Sempra Utilities
California Energy Commission	International Power Technology	Sierra Pacific Power Company
California League of Food Processors	Intestate Gas Services, Inc.	Silicon Valley Power
California Public Utilities Commission	Lawrence Berkeley National Lab	Silo Energy LLC
Calpine	Los Angeles Dept of Water & Power	Southern California Edison Company
Cardinal Cogen	Luce, Forward, Hamilton & Scripps LLP	Spark Energy, L.P.
Casner, Steve	MAC Lighting Consulting	Sun Light & Power
Center for Biological Diversity	MBMC, Inc.	Sunshine Design
Chris, King	MRW & Associates	Sutherland, Asbill & Brennan
City of Palo Alto	Manatt Phelps Phillips	Tabors Caramanis & Associates
City of Palo Alto Utilities	McKenzie & Associates	Tecogen, Inc.
City of San Jose	Merced Irrigation District	Tiger Natural Gas, Inc.
City of Santa Rosa	Modesto Irrigation District	TransCanada
Clean Energy Fuels	Morgan Stanley	Turlock Irrigation District
Coast Economic Consulting	Morrison & Foerster	United Cogen
Commercial Energy	Morrison & Foerster LLP	Utility Cost Management
Consumer Federation of California	NLine Energy, Inc.	Utility Specialists
Crossborder Energy	NRG West	Verizon
Davis Wright Tremaine LLP	NaturEner	Wellhead Electric Company
Day Carter Murphy	Navigant Consulting	Western Manufactured Housing Communities Association (WMA)
Defense Energy Support Center	Norris & Wong Associates	eMeter Corporation