May 13, 2013

Advice Letter 3377-G/4209-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:  California Solar Initiative Thermal Program Statewide and Local Marketing Campaigns – Six Month Continuation Plan for July 1 – December 31, 2013

Dear Mr. Cherry:

Advice Letter 3377-G/4209-E is effective May 2, 2013.

Sincerely,

Edward F. Randolph, Director
Energy Division
April 2, 2013

Advice 3377-G/4209-E
(Pacific Gas and Electric Company ID U 39 M)

Public Utilities Commission of the State of California

Subject: California Solar Initiative Thermal Program Statewide and Local Marketing Campaigns -- Six Month Continuation Plan for July 1-December 31, 2013

Purpose


Background

On January 21, 2010, the California Public Utilities Commission (Commission) approved D.10-01-022, Decision Establishing the California Solar Initiative Thermal Program to Provide Solar Water Heating Incentives. In Ordering Paragraph (OP) 6 of this Decision, the Commission directed PG&E and the Program Administrators (PAs), by April 1, 2010, to each file a separate advice letter, “that includes: a) a detailed estimate of its program budget for the first year of program implementation, indicating direct and indirect expenses, labor and non-labor, for incentives, administration, market facilitation, and measurement and evaluation; and b) its proposed market facilitation strategic plan and detailed budget for the first two years of program implementation.”

OP 13.b directs the PAs to “Separately submit an Advice Letter with proposed California Solar Initiative Thermal market facilitation budgets and activities for each calendar year, which addresses the activities identified in Appendix A, no later than October 1 of the preceding year;”.

In accordance with OP 6, the Statewide Market Facilitation Plan, running from July 1, 2011, to June 30, 2013, was approved by Energy Division effective
September 30, 2011. The concurrent Local Market Facilitation Plans for each of the four PAs were also approved by Energy Division effective September 30, 2011.

On September 28, 2012, Energy Division Staff approved the PA’s proposal that given certain time lapses during the planning of the Statewide Campaign, the PAs will then file Plans to cover the remaining six months of 2013 by April 1, 2013. Annual local market facilitation plans from each PA would henceforth be due on October 1 of the preceding year in accordance with D.10-01-022. Due to the fact that April 1, 2013, falls on Caesar Chavez Day, which is a CPUC State holiday, PG&E is filing this plan on April 2, 2013.

**Protests**

Anyone wishing to protest this filing may do so by letter sent via U.S. mail, facsimile or E-mail, no later than **April 22, 2013**, which is 20 days after the date of this filing. Protests must be submitted to:

CPUC Energy Division  
ED Tariff Unit  
505 Van Ness Avenue, 4th 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 (or 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).

**Effective Date**

PG&E requests that this Tier 2 advice filing become effective on regular notice, **May 2, 2013**, 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 Service List R.12-11-005. Address changes to the General Order 96-B service list should be directed to PG&E at 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

[Signature]

Vice President, Regulatory Relations

Attachment 1: California Solar Initiative – Thermal Program Statewide Marketing Campaign Six Month Continuation Plan and Local Market Facilitation Plan

cc: Service List R.12-11-005
Company name/CPUC Utility No. Pacific Gas and Electric Company (ID U39 M)

<table>
<thead>
<tr>
<th>Utility type:</th>
<th>Contact Person: Shirley Wong</th>
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</thead>
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<tr>
<td>☑ ELC</td>
<td>☑ GAS</td>
</tr>
<tr>
<td>☑ PLC</td>
<td>☑ HEAT ☑ WATER</td>
</tr>
</tbody>
</table>

EXPLANATION OF UTILITY TYPE

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

Advice Letter (AL) #: 3377-G/4209-E
Subject of AL: California Solar Initiative Thermal Program Statewide and Local Marketing Campaigns -- Six Month Continuation Plan for July 1-December 31, 2013
Keywords (choose from CPUC listing): Compliance
AL filing type: ☑ Monthly ☑ Quarterly ☑ Annual ☑ One-Time ☑ Other

Resolution Required? ☑ Yes ☑ No
Requested effective date: May 2, 2013
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).

Service affected and changes proposed:

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
ED Tariff Unit
505 Van Ness Ave., 4th Floor
San Francisco, CA 94102
EDTariffUnit@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
Attachment 1

California Solar Initiative – Thermal Program
Statewide Marketing Campaign
Six Month Continuation Plan and
Local Market Facilitation Plan
California Solar Initiative - Thermal Program
Statewide Marketing Campaign
Six Month Continuation Plan and Local Market Facilitation Plan
April 2, 2013
Advice Letter 3377-G/4209-E

Attachment 1

**Background:** In its Guidance Memo dated November 4, 2010, Energy Division staff recommended that the four Program Administrators (PAs) of the CSI-Thermal Program, i.e., Southern California Gas Company (SoCalGas), Pacific Gas and Electric Company (PG&E), California Center for Sustainable Energy (CCSE), and Southern California Edison Company (SCE), “hire a specialized marketing and outreach firm to manage a statewide campaign building off the established Go Solar, California! campaign”. The staff also recommended that each of the PAs contribute 40% of the first two years of their marketing facilitation budgets ($5 million) to fund statewide efforts.

In March 2011, SoCalGas, acting as Lead Party for the PAs, issued a Request for Proposals (RFP) for a statewide marketing campaign budgeted at $4.5 million, with the other $500,000 to be held in reserve for additional statewide efforts to be determined. After the RFP submittal and review process, SoCalGas, in consultation with the other three PAs, selected Fraser Communications as the successful bidder for the campaign in June 2011. The four PAs jointly developed a Scope of Work for the campaign designed to address the issues noted in D.10-01-022 and the Guidance Memo.

Based on the Scope of Work and input from the PAs as managed by SoCalGas, Fraser Communications developed a Statewide Market Facilitation Plan. The Plan outlines the approach that the statewide campaign will take by noting Goals, Strategies, Target Markets, Tactics by Market, Timetables by Category, and Budget by Category. The Plan is designed to achieve a consistency of messaging, materials, and outreach statewide and integrate with each PA’s local market facilitation plan.

The Statewide Market Facilitation Plan and the Local Market Facilitation Plans of each of the four PAs were the subject of a Public Workshop conducted by Energy Division staff at the CPUC building at 505 Van Ness Avenue in San Francisco, California, on Wednesday, August 3, 2011. Energy Division staff was provided with a copy of the PowerPoint Presentations prepared for the workshop on August 1, 2011, per their request. A representative of Fraser Communications presented the Statewide Plan, and a representative of each PA presented their Local Plan individually. Input and comments from Energy Division staff, stakeholders, and the public were taken at the workshop, and some modifications have been made to the Statewide Plan accordingly.

During a follow-up conference call between representatives of the Energy Division and the PAs on Thursday, August 11, 2011, it was agreed that each PA would re-file their Local Market Facilitation Plan in a Supplemental Advice Letter and SoCalGas as the Lead Party would file the Statewide Market Facilitation Plan in a new joint Advice Letter by August 31, 2011.
The Statewide Market Facilitation Plan, running from July 1, 2011, to June 30, 2013, was approved by Energy Division effective September 30, 2011. The concurrent Local Market Facilitation Plans for each of the four PAs were also approved by Energy Division effective September 30, 2011.

On September 28, 2012, Energy Division Staff approved the PA’s proposal that they file extensions of their existing approved local market facilitation plans to cover the remaining six months of 2013 by April 1, 2013. Annual local market facilitation plans from each PA would henceforth be due on October 1 of the preceding year in accordance with D.10-01-022.

**Statewide Marketing Campaign**

In April of 2012, the four Program Administrators launched the statewide marketing campaign via Fraser Communications to build awareness of solar water heating technology and the rebates available for qualifying systems through the CSI-Thermal Program for both residential and commercial customers.

The elements of the campaign included:

1. Campaign Internet Landing Page

2. 30-second TV Commercial
   a. NBC “Green is Universal” campaign
   b. Broadcast TV
   c. Cable TV
   d. Online Contextual Video Targeting

3. Residential-themed animated Internet Banner Ads
   a. Online Contextual Display Targeting

4. Business-themed animated Internet Banner Ads
   a. Business Targeting Network (BBN)

5. 60-second Radio Advertisement with a Residential Theme
   a. Broadcast Radio

6. 60-second Radio Advertisement with a Business Theme
   a. Broadcast Radio

7. Google Ad Word Search
   a. Google.com

8. Campaign Brochures
   a. Understanding Solar Water Heating for Single-family Homes
   b. Understanding Solar Water Heating for Multi-family Dwellings
   c. Understanding Solar Water Heating for Commercial Customers

9. Campaign Press Releases
   a. Launch
   b. Increased Rebate Levels
10. Pandora Internet Radio Ads
11. “Go Solar California” Newsletter
12. NPR Sponsorships
   a. Broadcast Radio
13. Trade Print Publications
   a. Various magazines
14. E-newsletters
15. Sunset Magazine Promotional “Breezehouse” Promotion

All the statewide materials promoted the website, [www.WaterHeatedbytheSun.com](http://www.WaterHeatedbytheSun.com). From there, visitors self-selected their water heating modality and their supplying utility and were redirected to the corresponding Program Administrator’s CSI-Thermal Program website section.

**Continuation Campaign Strategy and Plan:** The two-year statewide market facilitation plan draws to a close at the end of June, 2013. In an effort to sustain and build upon the momentum generated by the two-year statewide market facilitation plan, the four PAs jointly propose to continue to work together to manage a coordinated statewide market facilitation effort for the remainder of 2013 as a part of each of their individual local market facilitation plans. The expansion of the CSI-Thermal Program to include additional eligible technologies in the fall of 2013 will necessitate the development of some updated materials.

This continuation campaign will provide the basic infrastructure to allow the PAs to focus their local marketing efforts on targeted audiences to embellish and enhance the outreach generated by the statewide effort. It will also position the PAs to begin to plan for a more robust outreach for the expanded Program in their 2014 market facilitation plans due October 1, 2013.

SoCalGas will continue to serve as the Lead Party, operating under the terms of the co-funding agreement that currently exists between the four Program Administrators through the end of 2013. SoCalGas will process the paid media elements through its advertising agency after the expiration of the Fraser Agreement in June, 2013.

**Goals**

The goals of the coordinated statewide continuation effort are to work in conjunction with the Local Market Facilitation Plans to build awareness and increase understanding of:

1) Solar water heating and the California Solar Initiative – Thermal Program;
2) Solar water heating technology; and
3) The advantages and availability of CSI-TP rebates;

To increase the number of rebate applications statewide.

**Target Markets**

1) Contractors and installers
2) Commercial enterprise operators
3) Industrial facilities managers
4) Multi-family property owners
5) Single-family residence homeowners

Strategies

1) Maintain established digital statewide paid media elements
2) Develop new business internet banner ad and collateral materials to reflect program changes
3) Implement earned media outreach to publicize program changes

Tactics

1. Campaign Internet Landing Page
2. Google Ad Word Search
   a. Google.com
   b. Updated search
3. Online Contextual Video Targeting
   a. 30-second TV Commercial
4. Online Contextual Display Targeting
   a. Residential-themed animated Internet Banner Ads
5. Business Targeting Network (BBN)
   a. Business-themed animated Internet Banner Ads
   b. Updated for Program Expansion
6. Program Expansion Brochure(s)
7. Program Expansion Press Release(s)
## Timetable – Paid Media – Table 1

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## Budget by Category – Table 2

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<th>Paid Media Costs</th>
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<td>Website Hosting</td>
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<td>Google Search</td>
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<td>Display Targeting</td>
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<tr>
<td>Video Targeting</td>
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<td>Business Targeting</td>
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<tr>
<td>Business Banner Ad Production</td>
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<td>Press Release Distribution</td>
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<td>Business Banner Ad Development</td>
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<td>Press Release Development &amp; Distribution</td>
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<tr>
<td><strong>TOTAL BUDGET</strong></td>
<td>$ 400,000.00</td>
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</table>

California Solar Initiative – Thermal Program - Pacific Gas and Electric Company
Market Facilitation Plan - Page 5 of 11
Cost-sharing by Program Administrators

In order to allow the statewide continuation effort to be implemented, and because it is more cost-efficient to co-fund a statewide digital effort than individually fund separate ones, CCSE, PG&E and SoCalGas will contribute their proportionate shares of the budget using the same percentages as the two-year statewide market facilitation plan (Table 3). SCE has notified the PAs that they will not be funding the statewide continuation effort from July to December, 2013. The budget is revised to $363,200 to exclude SCE’s proportionate share of $36,800 (Table 4).

Overall Cost-sharing Amounts by Program Administrators – Table 3

<table>
<thead>
<tr>
<th>Program Administrator</th>
<th>Proportionate Share Percentage</th>
<th>Proportionate Share Amount</th>
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<tbody>
<tr>
<td>SCG</td>
<td>40.80%</td>
<td>$163,200.00</td>
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<td>PG&amp;E</td>
<td>39.94%</td>
<td>$159,760.00</td>
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<tr>
<td>CCSE</td>
<td>10.06%</td>
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<tr>
<td>SCE</td>
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<td><strong>TOTAL</strong></td>
<td><strong>100.00%</strong></td>
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Program Administrators Contributions to Revised Budget – Table 4

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<th>Program Administrator</th>
<th>Proportionate Share Contribution Percentage</th>
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<td>CCSE</td>
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<td>SCE</td>
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<td>$0</td>
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<td><strong>TOTAL REVISED BUDGET</strong></td>
<td><strong>90.8%</strong></td>
<td><strong>$363,200.00</strong></td>
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</tbody>
</table>
Background: The Statewide Market Facilitation Plan, running from July 1, 2011, to June 30, 2013, was approved by Energy Division effective September 30, 2011. The concurrent Local Market Facilitation Plans for each of the PAs were also approved by the Energy Division effective September 30, 2011.

On September 28, 2012, Energy Division Staff approved the PA’s proposal that they file extensions of their existing approved local market facilitation plans to cover the remaining six months of 2013 by April 1, 2013. Annual local market facilitation plans from each PA would henceforth be due on October 1 of the preceding year in accordance with D.10-01-022.

Pacific Gas and Electric Company’s (PG&E) Local Market Facilitation Plan for the CSI-Thermal Program herein supports the goals, strategies, and tactics articulated in the statewide marketing plan. Leveraging the messaging, materials, and taking a complementary tactical approach is intended to enhance the visibility and impact provided by the statewide campaign at the local level in PG&E’s service territory.

This plan covers the time period of July 1- December 31, 2013. Tactics have been selected based on lessons learned from prior year marketing execution and ongoing strategic conversations with the statewide PA’s, Energy Division staff, industry stakeholders, and the public. Some enhancements to the PG&E plan have been made to reflect these lessons and conversations.

PG&E’s Market Facilitation Strategy and Forecasted Budget for the period
July 1, 2013 – December 31, 2013

Goals:

The goals of the Statewide and Local Market Facilitation Plan are to:

- Build awareness and increase understanding of solar water-heating technologies and the California Solar Initiative – Thermal program
- Incentivize participation by promoting CSI-Thermal rebates and other available financial incentives
- Increase the number of rebate applications within PG&E’s service area
Target Markets:

- Single-family residential customers
- Multi-family property owners
- Commercial/Industrial customers
- Contractors and installers

Strategies:

Strategies to achieve above goals include:

- Leverage the statewide plans/creative to create a cohesive/complementary local level campaign.
- Create tools and classes for customers that drive understanding of: the distinct value of Solar Water Heating (SWH), key pre-installation steps, best practices for selecting qualified contractors.
- Capitalize on opportunities for marketing integration with other PG&E products and services, including but not limited to: Solar PV, Energy Efficiency, Demand Response, Rates Education and Events
- Continue to support and build the qualified contractor base within the PG&E service territory.

Tactics:

All Audiences:

All tactics will be designed to complement and supplement – not duplicate the finalized media and tactical plan for the Statewide campaign.

- Integration with other PG&E programs and offerings
  - Local events throughout the service territory
  - Messaging integration in direct to consumer pieces
  - Maintain ongoing GoSolar Newsletter contributions
- In-person/web training
  - Offer classes for customers, contractors and internal sales teams on the SWH technologies and the CSI-Thermal program.

Single Family Residential Customers:

Approach:

- Direct tactics to educate customers about next steps to engage a contractor consultation.
- Drive focus and impact of limited funds by targeting:
  - High prospect customer segment / demographics
  - Key Geography with the highest potential for customer interest in Solar Water Heaters and established contractor base.
Tactics:

- Direct Mail/E-Mail
  - Target customers who have a propensity to install solar or have previously shown interest in solar technology but have yet to act/install. Drive leads to the enhanced online contractor locator tool.
- Tools
  - Improve contractor locator tool to allow customers an easier way to take the next step in selecting a qualified solar water heating contractor.

Small/Medium Business (SMB) and Multi-family:

Approach/Tactics:

- Increase consumer awareness, with particular emphasis among Multi-family building owners/managers
- Grow Multi-family prospects and qualified leads with high engagement events. Host in-person presentations/workshops for select verticals and multi-family building owners/operators about CSI-Thermal/SWH technology
- Continue partnership with San Francisco (SF) Department of the Environment to increase awareness of CSI Thermal in SF among SMBs and Multi-family owners.

Large Commercial:

- Video Testimonials/Case Studies
  - Highlight large customer success stories to show third-party validation that SWH technology/benefits are viable in the large organization
- Update business focused fact sheets explaining the benefits of SWH for the business
- Ongoing Training
  - Ensure PG&E Sales team and partners have necessary education to integrate SWH into customer energy solutions
- Industry Trade Publication Advertising
  - Highlight successful business case studies in industry trade publications to show that SWH is viable for segment specific customers and end uses
- Solar industry sponsorships to show all customer segments the value of deploying SWH to solve challenges and support environmental stewardship and sustainability.

Contractors/Installers:

- Training
  - Series of in-depth contractor trainings from PG&E in 1-2 locations in 2013

MEASUREMENT/METRICS: PG&E will implement a set of tracking mechanisms for local tactics. This will aid understanding of initial interest, in SWH technologies, cost-effectiveness of our marketing tactics and net impact on adoption. Metrics will vary by tactic as noted, below:

- For Residential:
  - Direct Mail - number of recipients, increased web traffic, and leads.
  - E-mail - total target volume, number of contacts, open rate click through rate, web traffic, use of the online contractor locator tool.
- For SMB / Multi-family: Number of event attendees, intent to install survey scores, contractor inquiries, reservations, and new project installs.
- For Large Business: Number of inquiries, number of projects, size of projects (therms and/or kWh), and industry segment adoption

**TIMING:**

![Timing Diagram]

**LOCAL BUDGET (July 1, 2013 - Dec 31, 2013):**

<table>
<thead>
<tr>
<th>Solar Water Heating - PG&amp;E</th>
<th>Local Budget Forecast</th>
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<td><strong>Type of Spend</strong></td>
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<td>Un-allotted Funds*</td>
<td>$116,700.61</td>
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<tr>
<td><strong>Local Total</strong></td>
<td><strong>$1,204,700.61</strong></td>
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<tr>
<th><strong>Total July-Dec Budget Forecast</strong></th>
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<tr>
<td>Statewide</td>
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<tr>
<td>PG&amp;E Local</td>
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<tr>
<td><strong>Total Spend</strong></td>
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*Unallotted funds are being set aside to strengthen high performing areas of the market facilitation plans and/or explore new outreach tactics in consultation with the Energy Division.

**Previous Marketing Activities/Budgets**
As requested in the Request for Modification memo, below is an outline of the PG&E market facilitation Activities – including local and statewide.
<table>
<thead>
<tr>
<th>Name</th>
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<tr>
<td>1st Light Energy</td>
<td>Douglass &amp; Liddell</td>
<td>North America Power Partners</td>
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<td>G. A. Krause &amp; Assoc.</td>
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<td>Battelle Wells Associates</td>
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<td>Green Power Institute</td>
<td>SCE</td>
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<td>Hanna &amp; Morton</td>
<td>SDG&amp;E and SoCalGas</td>
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<td>In House Energy</td>
<td>SPURR</td>
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<td>International Power Technology</td>
<td>San Francisco Public Utilities Commission</td>
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<td>Cenergy Power</td>
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<td>Center for Biological Diversity</td>
<td>Los Angeles Dept of Water &amp; Power</td>
<td>Sun Light &amp; Power</td>
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<td>Manatt Phelps Phillips</td>
<td>Tiger Natural Gas, Inc.</td>
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<td>Wellhead Electric Company</td>
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<td>Dept of General Services</td>
<td>Nexant, Inc.</td>
<td>Western Manufactured Housing</td>
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<td>Communities Association (WMA)</td>
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