

PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE  
SAN FRANCISCO, CA 94102-3298



**Advice Letter: 4541-E**

February 5, 2015

Pacific Gas and Electric Company  
Attention: Meredith Allen  
Senior Director, Regulatory Relations  
77 Beale Street, Mail Code B10C  
San Francisco, CA 94177

**SUBJECT: PG&E's 2015 Marketing & Outreach Plan for the California Solar Initiative  
General Market and Multi-Family Affordable Solar Housing Programs**

Dear Ms. Allen:

Advice Letter 4541-E is withdrawn per PG&E Withdrawal Letter, dated January 30, 2015.

Sincerely,

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

Edward Randolph  
Director, Energy Division

December 1, 2014

**Advice 4541-E**  
(Pacific Gas and Electric Company ID U 39 E)

Public Utilities Commission of the State of California

**Subject: PG&E's 2015 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 2015 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 \$432,500 for CSI General Market and \$60,000 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 2014 CSI General Market M&O tactics;
- An outline of 2015 CSI General Market M&O goals and strategies;
- A detailed description of the 2015 M&O budget request and proposed timeline and;
- A request for funding for the M&O Plan for the MASH program.

**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 every six months thereafter.

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

On August 3, 2012, the Center for Sustainable Energy (CSE) filed a Petition for Modification,<sup>1</sup> requesting, in part, to combine the M&O and program administration budget subcategories of the CSI General Market administrative budget. This request was found to be reasonable by the Commission and subsequently granted in D.13-10-026. The Commission explained that "[a]llowing the CSI PAs the discretion to combine [the] M&O [and the] program administration budget subcategories of the CSI General Market administrative budget does not change or reduce the responsibility to perform required duties in administration, marketing and outreach, and monitoring & evaluation."<sup>2</sup> Accordingly, CSE's proposed 2014 M&O Plan takes into account the need to continue to perform required duties in M&O.

PG&E submits this 2015 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.

## **California Solar Initiative (CSI) Marketing and Outreach Plan**

### **I. Recap and Update of 2014 M&O Tactics**

#### *Commemoratory Community Event*

PG&E developed materials to celebrate the 100,000<sup>th</sup> solar customer milestone in our service area. Unanticipated weather and participation issues prevented the

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<sup>1</sup> Petition of the California Center for Sustainable Energy (CCSE) for Modification of Decisions D.10-09-046, D.08-10-036, D.11-07-031 and D.06-08-028 to Address California Solar Initiative General Market Program

<sup>2</sup> D.13-10-026, Conclusion of Law 2.

event happening as anticipated. However, PG&E has the opportunity to fully utilize the materials developed for a future milestone celebration in 2015.

#### *Net Energy Metering (NEM) Bill Education Pilot*

PG&E launched an integrated multi-touch direct mail and email campaign to educate customers about NEM billing as well as additional energy efficiency and solar maintenance information. New and existing customers receive these communications based on where they are in their solar experience with PG&E. The goal is to provide contextual relevance and help customers along in their energy management journey.

#### *NEM Billing Outreach*

PG&E produced a new consolidated version of the Welcome Kits incorporating changes resulting from the NEM bills launched in December 2013 and reprinted Small, Medium Business (SMB) Welcome Kits. These Kits explain to customers what happens after interconnecting their system, as well as information about NEM billing including a thorough overview of the process as well as explanations of key bill components.

#### *NEM Billing Communications*

Starting in January 2014, PG&E new solar customers began being billed out of a new billing system where both their monthly bill and NEM Statement were combined into one consolidated bill. Additionally, throughout 2014, existing customers were migrated over to the new billing system. PG&E developed an online video explaining what information is included in the consolidated bill and direct mail communications to help educate existing customers about the new consolidated bill to avoid customer confusion and provide an enhanced customer experience.

#### *Industry Engagement-Organizational Memberships*

PG&E continued 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 participated 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 in these events and with these organizations as they support and shape program and policy decisions that will drive solar adoption and ensure the success of CSI. These organizations included California Solar Energy Industries Association (CalSEIA), the Utility Solar Conference and Solar Electric Power Association (SEPA).

*Intersolar Conference- Go Solar California*

On July 8-10, 2014, PG&E's distributed generation team attended Intersolar in San Francisco to generate awareness about statewide CSI, Solar Water Heating and Self Generation Incentive (SGIP) programs. The exhibit booth included statewide branded program collateral and information and was staffed by subject matter experts from each program.

*Statewide Collaboration*

PG&E continued its support and coordination with the CSI PAs on the quarterly Go Solar California e-newsletter, a valuable source of information for customers interested in program changes, regulatory updates and relevant industry news and events. PG&E funded a portion of the production and design aspect of the newsletter and provided direct support in the form of content, news and process improvement ideas.

*Website*

The PG&E business to business interconnection web pages were updated to streamline Standard NEM contractor content creating a more customer friendly navigation and featuring the new online Interconnection Tool. Content updates included tips and advice during the application process, key interconnection information for contractors to make customers aware of throughout the interconnection process (i.e., recommended energy efficient measures before sizing their system, when to turn on their system, rate options, and PG&E inspection timing), a customer interconnections page, and key information for self-installers.

**II. 2015 Marketing and Outreach Goals and Strategies**

The CSI-General Market Program has been very successful and the 150,000<sup>th</sup> solar customer within PG&E's territory is anticipated to be interconnected in Q1 2015. As a result, PG&E would like to continue supporting our growing solar customer base having a positive solar experience and is committed to optimizing customer tools and continuing to provide education to help customers' decision to go solar.

PG&E plans to continue to leverage the successful foundation established and built in 2014, and has identified the following strategies for 2015 in support of the CSI Program:

- Engage with solar industry to facilitate market improvements that reduce barriers to solar adoption.

- Improve the customer experience by providing relevant and helpful tools, information and resources to better set and manage the expectations of “going” solar.

### **III. Tactics**

The following section outlines the M&O tactics and activities PG&E has identified for 2015 to support the above-mentioned strategies.

#### **Customer and Stakeholder Outreach/Education**

##### *Consumer Protection Efforts Outreach*

PG&E will continue its focus on updating tools and materials to help customers make informed choices in their adoption of solar (e.g., bid comparison forms.) In addition, PG&E will develop communications to educate customers on these updated tools and reinforce PG&E as a valuable independent resource for solar information.

##### *Energy Solutions & Service Team Outreach/Education*

PG&E proposes to develop a region-specific pilot to leverage its Energy Solutions and Service Team to coordinate local outreach efforts through workshops, events or in-person interactions. The goal will be to provide educational training and distribute materials that clearly explain the benefits of distributed generation programs. This will enable PG&E Energy Solutions and Service members to act as trusted energy advisors for our customers and help customers make informed decisions about distributed generation programs as well as integrate with other offerings in a customer’s energy management journey (energy efficiency and demand response.) After evaluating the effectiveness of the local pilot, this effort may be expanded into a broader region within PG&E’s service area.

##### *Contractor Engagement*

PG&E proposes to develop communications to keep contractors apprised of PG&E customer communications that may affect customer questions contractors could receive as a result (e.g., turning on their solar system or cleaning solar panels). In addition, PG&E plans to share tools and resource updates that will help contractors in the interconnection process (e.g., online tools, tips and advice to help avoid interconnection delays).

## **Events**

### *Commemorative Community Event*

PG&E would like to recognize and celebrate its 150,000<sup>th</sup> solar customer milestone expected in Q1 2015. 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 plans to leverage any materials developed from the 100,000<sup>th</sup> celebration that can be repurposed for this event. PG&E will announce and promote the event using local public relations media channels.

### *Ad-Hoc Events and Activities*

As in 2014, 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 the goals and strategies outlined above and the proper level of funding.

## **Collaboration**

### *Statewide Collaboration*

Quarterly distribution of the Go Solar California e-newsletter continues to be a useful communication platform to deliver important news and program updates. PG&E proposes to continue its participation in the creation and distribution of the statewide Go Solar Newsletter coordinated by the program administrator, CSE. In addition, PG&E will coordinate with the Energy Upgrade California statewide campaign administered by CSE to ensure any statewide and local solar messages occurring in the same timeframes are coordinated.

### *Industry Engagement- Organizational Memberships*

PG&E would like to continue its support of various industry organizations who are dedicated to improving the process of going solar. In an effort to foster market transformation and address key solar issues, PG&E proposes to continue working with supporting relevant organizations.

## **Website**

To support all of the above-mentioned activities, PG&E will continue to refine and optimize 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 setting aside budget for fixed costs and activities including, but not limited to, reprinting existing and new materials, 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. 2015 General Market M&O Budget

The table below consists of a summary of PG&E's 2015 General Market M&O tactics and the associated budgets that were described in more detail in the above section.

#### 2015 General Market M&O Tactics Summary Cost

	Tactic	Budget
	<b>Customer &amp; Stakeholder Outreach/Education</b>	
1	Consumer Protection Efforts	\$65,000
2	Energy Solutions & Service Team Outreach/Education	\$10,000
3	Contractor Engagement	\$10,000
	<b>Events</b>	
4	Commemoratory Community Event	\$8,500
5	Ad-Hoc Events and Activities	\$25,000
6	<u>Statewide Collaboration</u> Go Solar Newsletter	\$6,500
7	<u>Industry Engagement</u> Organizational Memberships	\$25,000
8	<b>Website</b>	\$100,000
9	<b>Fixed overhead and Labor</b>	\$182,500
	<b>Total</b>	<b>\$432,500</b>

**V. 2015 General Market Timeline**

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
CSI												
Commemorative Community Event												
Consumer Protection Efforts												
Newsletter												
Contractor Engagement												
ES&S Engagement												
Interconnection Website updates												

**MASH Marketing and Outreach Plan**

**I. Recap and Update of 2014 M&O Tactics**

*Virtual Net Energy Metering (VNEM) Education Package Distribution*

PG&E created a brochure on Virtual Net Energy Metering to educate and improve the customer experience. The brochure is geared at helping new VNEM (MASH and General Market) customers learn what virtual net energy metering is and the benefits of using My Energy to help them understand their bill and VNEM statement. The development was completed and distribution began in 2014 and will continue into 2015.

**II. 2015 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 of affordable housing and result in maximum value of their solar system.
- Educate new contractors on the program and existing contractors on program and incentive level changes occurring in 2015.

**III. Tactics**

The following section outlines the M&O tactics and activities PG&E has identified that will help us meet these goals in 2015.

*Building Owner, Contractor and Tenant Educational Materials*

PG&E would like to update program educational materials targeting building owners and contractors. The materials would include new program details and requirements. Program educational materials for tenants would include content on solar and the associated benefits of solar and of energy efficiency as an integrated larger energy management approach. Project scope would include design, printing and distribution of materials.

*Web Updates*

PG&E plans to continue to update the MASH section of the PG&E website to include educational information on 2015 program updates.

*Contractor Training*

PG&E plans to continue to offer contractor training and recommends recording the training. Contractors are essential in educating building owners on this program and PG&E would like to maximize their efforts by increasing the number of educated contractors and ensuring that they are aware of 2015 program updates.

*Ad-Hoc Events and Activities*

As in 2014, 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 the goals and strategies outlined above and reflects the proper level of funding.

*Fixed Overhead and Labor*

In order to continue to provide ongoing support and materials, PG&E requests setting aside budget for fixed costs and ongoing activities included, but not limited to, reprinting existing and new materials, collateral management and fulfillment, etc. This will also include the necessary funding for adequate staff to support 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.

**IV. 2015 MASH M&O Budget**

The table summarizes PG&E's 2015 MASH M&O tactics and the associated budgets that were described in more detail in the above section.

**2015 MASH M&O Tactics Summary Cost\***

	<b><i>Tactics</i></b>	<b><i>Budget</i></b>
1	Building Owner, Contractor and Tenant Educational Materials	\$30,000
2	Web Updates	\$10,000
3	Contractor Trainings	\$ 5,000
4	Ad-Hoc Events and Activities	\$ 5,000
5	Fixed Overhead and Labor	\$10,000
	<b>Total</b>	<b>\$60,000</b>

\* PG&E requests flexibility to modify the advice letter once the final decision on Assembly Bill 217 regarding program administration is issued.

**V. 2015 MASH M&O Timeline**

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
MASH												
Building Owner, Contractor & Tenant Materials												
Web Updates												
Contractor Training												

**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 22, 2014 which is 21 days<sup>3</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:

<sup>3</sup> The 20-day protest period concludes on a weekend, therefore, PG&E is moving this date to the following business day.

Meredith Allen  
Senior Director, 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, December 31, 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 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>

\_\_\_\_\_  
/S/

Meredith Allen  
Senior Director, 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       GAS  
 PLC       HEAT       WATER

Contact Person: Kingsley Cheng

Phone #: (415) 973-5265

E-mail: k2c0@pge.com and PGETariffs@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) #: **4541-E**

Tier: **2**

Subject of AL: **PG&E's 2015 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.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: \_\_\_\_\_

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: \_\_\_\_\_

Resolution Required?  Yes  No

Requested effective date: **December 31, 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

Pending advice letters that revise the same tariff sheets: N/A

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

**California Public Utilities Commission**  
**Energy Division**  
**EDTariffUnit**  
**505 Van Ness Ave., 4<sup>th</sup> Flr.**  
**San Francisco, CA 94102**  
**E-mail: EDTariffUnit@cpuc.ca.gov**

**Pacific Gas and Electric Company**  
**Attn: Meredith Allen**  
**Senior Director, 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**

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