

## PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE



July 12, 2019

**Advice Letter 5540-E**

Erik Jacobson  
Director, Regulatory Relations  
Pacific Gas and Electric Company  
77 Beale Street, Mail Code B10C  
P.O. Box 770000  
San Francisco, CA 94177

**SUBJECT: Request for Approval of PG&E's Residential Rate Reform Evaluator  
Contract in Compliance with Decision 17-12-023**

Dear Mr. Jacobson:

Advice Letter 5540-E is effective as of June 02, 2019.

Sincerely,

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

Edward Randolph  
Deputy Executive Director for Energy and Climate Policy/  
Director, Energy Division

May 3, 2019

**Advice 5540-E**

(Pacific Gas and Electric Company ID U 39 E)

Public Utilities Commission of the State of California

**Subject: Request for Approval of PG&E's Residential Rate Reform Evaluator Contract in Compliance with Decision 17-12-023**

**Purpose**

Pursuant to Ordering Paragraph 9 and Appendix A of California Public Utilities Commission (CPUC or Commission) Decision (D.)17-12-023, Pacific Gas and Electric Company (PG&E) hereby submits this Tier 2 advice letter for compliance approval of the contract resulting from the Request for Proposal process to select the Evaluator, Ipsos, a subsidiary of Research Data Analysis, Inc. (Ipsos)<sup>1</sup>, for the Statewide Residential Rate Reform Marketing, Education, and Outreach (ME&O) program. PG&E requests that the Commission approve the contract as compliant with the requirements of Decision (D.) 17-12-023.

**Background**

In D.17-12-023, PG&E, Southern California Edison (SCE), and San Diego Gas and Electric Company (SDG&E), collectively the investor-owned utilities (IOUs), were directed to conduct, in consultation with the Commission's Energy Division and the ME&O Working Group, a competitive request for proposal (RFP) solicitation process to select a consultant to perform Evaluation Work for Statewide Residential Rate Reform ME&O<sup>2</sup>. The Evaluator (Evaluator) is to provide interim and final evaluations of strategy effectiveness of the residential rate reform statewide ME&O program based on metrics defined by Energy Upgrade California administrative staff and the ME&O Working Group which includes the Commission's Energy Division and other stakeholders.<sup>3</sup>

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<sup>1</sup> Ipsos is a subsidiary of Research Data Analysis, Inc., a firm with which PG&E has a Master Agreement, in June 2015.

<sup>2</sup> D.17-12-023, OP 9, p. 63.

<sup>3</sup> D.17-12-023, Phase II-B: Evaluation Work, Appendix A, p. 5, and Appendix B.

By agreement of the IOUs, PG&E established and coordinated an RFP process, per Ordering Paragraph 9. Ipsos was selected as the Evaluator for Statewide Residential Rate Reform ME&O based on the highest score from the scoring committee with a contract signed on July 24, 2018.

A contract work authorization in the amount of \$1,123,000 was executed by PG&E<sup>4</sup> and will be managed in conjunction with the CPUC and Energy Upgrade California administrative staff. Funding will be allocated from the Statewide Residential Rate Reform ME&O budget as follows: 45% for PG&E, 43% for SCE, and 12% for SDG&E.<sup>5</sup>

The initial Contract Work Authorization including the Statement of Work (SOW) signed on July 24, 2018 is included in Attachment A. The Change Order SOW as agreed to the ME&O Working Group signed on October 18, 2018 is included in Attachment B.

PG&E will continue to serve solely as the fiscal manager of the contract with the Statewide ME&O program implementer. SCE and SDG&E will reimburse PG&E using the funding allocation percentages indicated above. Control and supervision of the deliverables, performance, design of, and any modifications to the program will be by the Commission. As the fiscal manager, PG&E will continue the process currently in place and will obtain Commission review and approval of the contractor's invoices prior to PG&E processing and paying the invoiced amounts.

### **Confidentiality**

Some of the information in these documents, such as the prices, could be used by energy marketing, education, or outreach services providers to affect the price that PG&E subsequently pays for ME&O goods and services. The Contract describes the associated rates and charges, deemed necessary to fulfill the scope of work. This information constitutes confidential market sensitive information and trade secret information that must be protected from public disclosure to avoid placing PG&E's customers at a commercial disadvantage. PG&E has attached to this advice letter a Confidentiality Declaration in compliance with General Order 66-D.

### **Protests**

Anyone wishing to protest this submittal may do so by letter sent via U.S. mail, facsimile or E-mail, no later than May 23, 2019, which is 20 days after the date of this filing. Protests must be submitted to:

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<sup>4</sup> The initial contract work authorization was signed on July 24, 2018 with a supplemental contract work authorization signed on October 18, 2018 to adjust the amount authorized.

<sup>5</sup> D.17-12-022

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:

Erik Jacobson  
Director, Regulatory Relations  
c/o Megan Lawson  
Pacific Gas and Electric Company  
77 Beale Street, Mail Code B13U  
P.O. Box 770000  
San Francisco, California 94177

Facsimile: (415) 973-3582  
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**

Pursuant to General Order (GO) 96-B, Energy Industry Rule 5.2, this advice letter is submitted with a Tier 2 designation. This advice letter will become effective on June 2, 2019, the 30<sup>th</sup> calendar day after the date submitted.

### **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.12-06-013. 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/>.

/S/

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Erik Jacobson  
Director, Regulatory Relations

Attachments

cc: Service List R.12-06-013



# ADVICE LETTER SUMMARY

## ENERGY UTILITY



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

Company name/CPUC Utility No.: Pacific Gas and Electric Company (ID U39E)

Utility type:

☒ ELC ☐ GAS ☐ WATER  
☐ PLC ☐ HEAT

Contact Person: Yvonne Yang

Phone #: (415)973-2094

E-mail: PGETariffs@pge.com

E-mail Disposition Notice to: QXY1@pge.com

### EXPLANATION OF UTILITY TYPE

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

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #: 5540-E

Tier Designation: 2

Subject of AL: Request for Approval of PG&E's Residential Rate Reform Evaluator Contract in Compliance with Decision 17-12-023

Keywords (choose from CPUC listing): Agreements

AL Type: ☐ Monthly ☐ Quarterly ☐ Annual ☒ One-Time ☐ Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #: D.17-12-023

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:

Confidential treatment requested? ☒ Yes ☐ No

If yes, specification of confidential information: See attached matrix that identifies all of the confidential information. Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information: Wilkins, Kristi, K1WJ@pge.com

Resolution required? ☐ Yes ☒ No

Requested effective date: 6/2/19

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<sup>1</sup>: N/A

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

<sup>1</sup>Discuss in AL if more space is needed.

**Protests and all other correspondence regarding this AL are due no later than 20 days after the date of this submittal, unless otherwise authorized by the Commission, and shall be sent to:**

CPUC, Energy Division  
Attention: Tariff Unit  
505 Van Ness Avenue  
San Francisco, CA 94102  
Email: [EDTariffUnit@cpuc.ca.gov](mailto:EDTariffUnit@cpuc.ca.gov)

Name: Erik Jacobson, c/o Megan Lawson  
Title: Director, Regulatory Relations  
Utility Name: Pacific Gas and Electric Company  
Address: 77 Beale Street, Mail Code B13U  
City: San Francisco, CA 94177  
State: California Zip: 94177  
Telephone (xxx) xxx-xxxx: (415)973-2093  
Facsimile (xxx) xxx-xxxx: (415)973-3582  
Email: [PGETariffs@pge.com](mailto:PGETariffs@pge.com)

Name:  
Title:  
Utility Name:  
Address:  
City:  
State: District of Columbia Zip:  
Telephone (xxx) xxx-xxxx:  
Facsimile (xxx) xxx-xxxx:  
Email:

Clear Form

**PACIFIC GAS AND ELECTRIC COMPANY**  
**APPENDIX A**  
**(REDACTED)**





## Contract Work Authorization (CWA)

This Contract Work Authorization ("CWA") No. C9526 is issued under and pursuant to the Blanket Agreement or Master Service Agreement No. C1172 (formerly No. 4400004442) dated 4/20/2010 (the "MSA") between the below-named Contractor ("Contractor"), a Michigan Corporation, and Pacific Gas and Electric Company ("PG&E"), a California corporation with its headquarters located at 77 Beale Street, San Francisco, California 94105. Contractor shall perform all Work under this CWA pursuant to and in accordance with the terms and conditions of the MSA.

**Contractor's Legal Name:** Research Data Analysis, Inc.

**Total Number of Pages:** 16

**Contractor's Address:** 450 Enterprise Ct.

Bloomfield Hills, MI 48302

**Project Name:** Evaluator for Statewide Rate Reform Marketing, Education & Outreach

**Job Location:** Various within the PG&E Service Territory

**WORK:** Contractor shall, at its own risk and expense, perform the Work described in this Contract Work Authorization and furnish all labor, equipment, and materials necessary to complete the Work as summarized below and as more fully described in Attachment 1, Statement of Work.

Evaluator to provide planning and measuring specific aspects of the statewide residential rate reform campaign, via customer research, and the achievement of "Vision Metrics" and accompanying sub-metrics, as further described in Attachment 1 Statement of Work.

**ATTACHMENTS:** Each of the following documents are attached to this CWA and are incorporated herein by this reference:

Attachment 1: Statement of Work, 8 pages

Attachment 2: Pricing Worksheet, 1 page

Attachment A: Transition Schedule, 5 pages

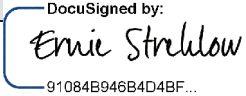

**CWA TERM:** This CWA is effective upon signature by both parties and expires on 12/31/2021. Time is of the essence.

**CWA COMPLETION:** Contractor shall commence performance hereof when directed to do so by PG&E and Work shall be completed by the completion date of 12/31/2021.

**CONSIDERATION:** As full consideration for satisfactory performance of the Work under this CWA by Contractor, PG&E's total obligation to Contractor shall not exceed the following amount. This amount is inclusive of all taxes incurred in the performance of the Work. Any change to this amount shall only be authorized in writing by a PG&E CWA Change Order, fully executed by both PG&E and Contractor.

**TOTAL:** \$1,100,000.00

**THE PARTIES, BY SIGNATURE OF THEIR AUTHORIZED REPRESENTATIVES, HEREBY AGREE TO THE TERMS OF THIS CONTRACT WORK AUTHORIZATION.**

PACIFIC GAS AND ELECTRIC COMPANY		CONTRACTOR: Research Data Analysis, Inc.	
<b>Signature</b>	 DocuSigned by: 91084B946B4D4BF...	<b>Signature</b>	 DocuSigned by: BEDC9A276C41424...
<b>Name</b>	Eric Strehlow Richard Cordova	<b>Name</b>	Mark P. Campbell
<b>Title</b>	Sourcing Manager	<b>Title</b>	VP & Treasurer
<b>Date</b>	7/24/2018	<b>Date</b>	7/21/2018



## Contract Work Authorization

CWA No. C9526

Page 2 of 16

ADMINISTRATION			
<b>PG&amp;E Negotiator</b>	Ernest Aquilio	<b>Contractor Represent</b>	
<b>Phone</b>	415-973-2535	<b>Phone</b>	
<b>Email</b>	Ernest.aquilio@pge.com	<b>Email</b>	
<b>Accounting Reference</b>			
<b>PG&amp;E Work Supervisor:</b>	Elissa Pollock	<b>Phone:</b>	415-973-5597
<b>INVOICE INSTRUCTIONS:</b> Contractor shall send invoices for each payment when due, showing the CWA number, to: PACIFIC GAS AND ELECTRIC COMPANY	<b>Send ORIGINAL Invoice to:</b> (See note below if using PG&E's electronic invoicing system)	PG&E Accounts Payable* PO Box 7760 San Francisco, CA 94120-7760	
	<b>Send COPY of Invoice to:</b>	Elissa Pollock, EXPT@pge.com	
	For information regarding invoice status, call PG&E's Paid Help Line at (800) 756-PAID (7243) or go to AP Web Reporting site at <a href="http://www.pge.com/actpay">www.pge.com/actpay</a> . <b>*Note:</b> Contractors using PG&E's electronic invoicing system do not need to mail a copy of the invoice to PG&E Accounts Payable.		

INTERNAL PG&E USE ONLY			
<b>Distribution Date</b>			
<b>Distribution of Copies:</b>	<input type="checkbox"/> Document Services (Signed Original Copy) Mail Code N5D 245 MARKET ST., SAN FRANCISCO	<input type="checkbox"/> Contractor (Signed Original Copy)	
	<input type="checkbox"/> Work Supervisor	<input type="checkbox"/> Manager	
	<input type="checkbox"/> Invoice Approver	<input type="checkbox"/> Supervisor	
	<input type="checkbox"/> V.P.	<input type="checkbox"/> Sourcing/ Purchasing	
	<input type="checkbox"/> Director	<input type="checkbox"/> Law	

## Evaluator for Statewide Rate Reform Marketing, Education &amp; Outreach

**Statement of Work****1. INTRODUCTION****Residential Rate Reform Regulatory Background**

California Public Utilities Commission (CPUC) Decision D.15-07-001 adopted a number of residential rate reform measures and set forth steps to transition California's default residential rate structure – from tiered, non-time-varying rates to time-of-use (TOU) rates – starting in 2019. The Commission also stressed the importance of educating customers on the rate reforms ordered by the Decision. For TOU rates to be effective, customers must: be aware of their current rates, understand how those rates are changing, and receive useful information on what they can do to engage with the new rate structures and control their bills.

The Decision directed the energy companies to establish memorandum accounts to track costs associated with time-of-use pilots, including marketing, education, and outreach ("ME&O") costs, and form a Working Group to examine ME&O issues involving time-of-use rate design and how ME&O for rate changes interacts with other residential programs.

On December 17, 2015, another CPUC ruling directed the investor-owned utilities (IOUs) to hire a consultant to advise the Rate Reform ME&O Working Group (WG) in developing: (1) metrics with goals and targets, (2) a strategic action plan for the IOUs to achieve said targets, and (3) a plan for statewide ME&O program coordination. Following a competitive solicitation, the WG selected Greenberg, Inc. as the statewide ME&O consultant. On August 20, 2016, Greenberg released its "RROIR ME&O Blueprint," a strategic action plan for statewide and local utility marketing. The Blueprint proposed a statewide ME&O vision, metrics, and implementation plan for 2019 default time-of-use rates.

On November 1, 2016, the IOUs submitted their local ME&O plans detailing their strategies, tactics, and timelines for customer engagement. The plans have since been approved, with modifications.

On December 23, 2017, the CPUC issued Decision 17-12-023 to address statewide marketing, education, and outreach for residential rate reform. The Decision expands the ongoing Energy Upgrade California (EUC) campaign<sup>1</sup> and adds to the role of DDB San Francisco (DDB), the statewide implementer of the EUC campaign, the task of implementing statewide residential rate reform ME&O to help "avoid duplicative efforts and expenditures, and...leverage the time and

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<sup>1</sup> EUC refers to "Energy Upgrade California," a multi-year statewide marketing, outreach and education campaign to lead consumers to products, services, and rates that will empower all Californians to take actions that will lead to better energy management, improved energy efficiency, and the adoption of more customer-owned renewable energy technologies.

resources that the Commission, DDB, the IOUs, and other stakeholders have already expended on EUC<sup>2</sup>”. The scope of work for the statewide rate reform campaign is structured in two phases: Phase 1 (the responsibility of DDB): updating the ME&O Blueprint update, followed by marketing content development, testing, creative design, and Blueprint maintenance, and Phase 2 (the responsibility of consultants to be selected): a) media implementation and outreach, and b) separate evaluation of the statewide ME&O effort.

The Decision directs the IOUs to conduct competitive solicitations to select consultants for Phase 2a) Implementation Work and Phase 2b) Evaluation Work (Phases 2.a and 2.b)<sup>3</sup>. This Request for Proposal is to select the Evaluation Consultant for Phase 2b.

Phase 1 work has started and timelines for the deliverables have been described in the Decision<sup>4</sup>. However, the timing of the IOUs’ actual default to TOU rates has not yet been determined; a decision on that matter is expected in May 2018. It is therefore critical for the evaluator of the statewide residential rate reform campaign to be flexible in its approach to this assignment.

## **2. PURPOSE**

The Evaluator (“Evaluator”) shall be responsible for planning and measuring specific aspects of the statewide residential rate reform campaign, via customer research, and the achievement of “Vision Metrics” and accompanying sub-metrics, as below.

The Greenberg Blueprint proposes three Vision Metrics to align and guide residential rate reform toward a common objective.<sup>5</sup> All Marketing, Education and Outreach (ME&O) efforts, on the parts of both the IOUs and the statewide consultant (DDB), are directed towards achieving the Vision Metrics, which are: 1) Engagement, 2) Rate Choice, and 3) Action.<sup>6</sup> The Engagement metric is the responsibility of DDB; the Rate Choice metric is the responsibility of the individual IOUs, and the Action metric is the responsibility of both DDB and the IOUs. Each Vision Metric “is a means by which to assess the effectiveness of the actions taken by the owner”.<sup>7</sup>

The Vision Metrics, sub-metrics, and their owners are shown in Table 1 below.

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<sup>2</sup> D.17-12-023, P.25

<sup>3</sup> D.17-12-023, OP9

<sup>4</sup> D.17-12-023, Appendix A

<sup>5</sup> Blueprint Slide 60

<sup>6</sup> D.17-12-023, p.42 and OP4

<sup>7</sup> D. 17-12-023, p.13

Focus	Vision Metrics	Owner/Responsible Party	Sub-metrics that contribute to the Vision Metrics
<b>Engagement</b>	<b>% of Californians feel a personal connection to electricity and feel strongly that it is important to be thoughtful about when and how much they use</b>	Statewide	% of customers who strongly agree that they have a personal connection with their electricity use
		Statewide	% of customers who understand the value of managing their electricity use
		Statewide	% of customers who strongly agree that how much electricity they use at certain times of day matters
<b>Rate Choice</b>	<b>% of IOU customers who are on the 'right rate' for them</b>	IOUs	% of customers who are aware that they have rate choices
		IOUs	% of non-exempt customers (as defined by Commission decision) who remain on the TOU rate 15 months after default (3 months after bill protection ends) <sup>8</sup>
		IOUs	% of customers who are satisfied on their rate (TOU or other)
<b>Action</b>	<b>% of IOU customers on TOU rates sustain at least one significant peak reduction action for 12 months after defaulting to the TOU rate</b>	IOUs/ Statewide	% of customers who are motivated to reduce peak load
		IOUs/ Statewide	% of customers who indicate they will take peak load reducing actions in the future
		IOUs/ Statewide	% of customers who cite significant peak load reducing behaviors

<sup>8</sup> Note that this retention sub-metric is sourced via IOU customer data, not via survey

The Evaluator is to “...provide an interim and final evaluation of strategy effectiveness based on the metrics defined by the EUC administrative staff and the ME&O Working Group”<sup>9</sup>. It is expected that the Evaluator will provide a research plan based on tracking the Vision Metrics and sub-metrics, with research performed across the state using appropriate methodologies and segmentation approaches to ensure an accurate representation of the three IOUs’ territories and customer bases. The research should include a “baseline” evaluation of the Vision Metrics and sub-metrics, an “interim” evaluation, and a “final” evaluation, with accompanying analysis and reports (discussed in more detail below).

The Blueprint Update under development by DDB will include a preliminary or proxy “baseline” measurement for the Engagement and Action metrics, both of which are the responsibility of DDB (the latter is a joint responsibility with the IOUs). In addition, DDB will propose initial targets or Key Performance Indicators (KPIs) “to ensure adequate performance and the efficient use of ratepayer dollars”.<sup>10</sup>

### **3. EVALUATOR TASKS & RESPONSIBILITIES**

#### **Task 1. Project Initiation (PI) Meeting and Research Plan**

The Evaluator shall begin the project with the facilitation of Project Initiation (PI) meetings, first with IOU project staff, with the CPUC Energy Division and, as required, with the ME&O Working Group. The objectives of the PI meetings will be to review the study objectives, research design and processes, scope, schedule, and budget of the proposed study plan (primarily based upon Evaluator’s proposal). The PI meetings are important forums for the Evaluator to: discuss project quality control, communication protocols, and work flow processes; identify and devise solutions for potential project risks; and establish rapport with the project team to ensure efficient and effective collaboration throughout the study.

The Evaluator, in reviewing the objectives of the research, shall propose a strategy to understand the respective contributions of each entity (DDB, the IOUs) to the achievement of the goals and metrics. This is particularly relevant with regard to the third Focus of the Vision Metric (Action) where the contribution of each entity needs to be understood.

Also, in terms of project work flow and risks, the Evaluator is required to discuss feedback that may result in adjusting the survey plan and course correction during the project.

The Evaluator shall propose a structure and process for developing the research plan. The final research plan should contain the following elements, at a minimum:

- Description of the proposed methodologies

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<sup>9</sup> D. 17-12-023, Appendix A, Phase II-B: Evaluation Work, P. 5

<sup>10</sup> D. 17-12-023 Conclusions of Law P. 60, #10

- Research questions to address Vision Metrics, sub-metrics, and any other measurements helpful to the assessment of the goals and metrics
- Data needs
- Plan for all data collection activities
- Plan for all analysis activities
- Detailed work plan and schedule for the study by task, including:
  - Timelines with key milestones and deliverables
  - Budget breakdowns
- Description of baseline, interim and final report deliverables

In order to schedule fieldwork with regard to baseline, interim, and final waves of measurement, it is essential for the Evaluator to be aware of each IOU's unique default timeline. (See Attachment A Transition Schedule for the default timelines for each IOU).

Below is current media transition schedule

			SDG&E Rollout Begins						PG&E/SCE Rollouts Begin					
			Q1			Q2			Q3			Q4		
			JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
2018	EUC Y1   Y2  Vision	Statewide	EE Y1			EE Y2								
		Statewide												
		SDG&E												
2019	EUC Y2   Y3  Vision  Peak Shifting	Statewide	EE Y2			EE Y3								
		Statewide	Statewide to align w/SW press from SD default											
		SDG&E				Vision (Light)								
		SDG&E				SDG&E								
2020	Vision  Peak Shifting	Statewide	Vision (Light)						Vision			Vision (Light)		
		PG&E										PG&E		
2021	Vision  Peak Shifting	Statewide	Vision (Light)											
		PG&E   SCE		PG&E				SCE						

The IOUs will be sending frequent communications to default-eligible customers, beginning 90 days before their respective default dates, with information about the default, the customer's rate choices, and actions that customers can take to manage their bill according to the rate they are or will be on.



In addition, DDB will be launching a statewide “air coverage” campaign, starting before the individual IOUs’ communications, to provide the environmental context for Time of Use (TOU) rates and encourage thoughtful energy use.

SDG&E will be the first IOU to default customers to TOU, starting in March 2019. Given the need to complete baseline fieldwork before any communications are launched, *this start date necessitates that a baseline survey be in the field for SDG&E’s customers in September 2018.* The Evaluator must assess the default timelines of each IOU and make a recommendation as to when each IOU’s research studies should be done, and whether any statewide fieldwork should be performed at the same time (such as for baseline measurement).

## **Task 2. Sampling plan development for survey research**

The Evaluator must demonstrate experience with developing complex survey sampling plans for populations with multiple segments. The Evaluator shall develop a sampling plan for the first baseline survey to be fielded in September 2018. For ensuing surveys, the Evaluator shall update the sampling plan.

In terms of targeting and segmentation, the customer base of each IOU must be represented demographically and geographically, with representation of:

- Climate regions (Hot/Moderate/Cool)
- CARE/FERA status
- TOU Default-Eligible vs. Ineligible customers (default-eligible consists of 60% and 70% of PG&E’s and SCE’s customer bases respectively)

Additionally, the Evaluator must consider and discuss the inclusion of “hard-to-reach” customers across the state, such as in-language, low-income, and geographically isolated segments. The Evaluator is to make a recommendation about how best to include hard-to-reach customers, in light of the need to balance cost efficiencies against the ability to obtain enough hard-to-reach representation to be useful. It is suggested that these hard-to-reach segments be considered:

- low-income customers, not restricted to CARE customers but further defined in terms of income and household size;
- in-language, specifically Spanish-speaking, Chinese-speaking and Spanish and Chinese language preference
- disabled customers.

The Evaluator’s determination should propose possible options and include the pros and cons of each approach.

eEvaluator’s sampling plan is broadly agreed by the IOUs with these caveats:

- reduce SDG&E’s boost from 2000 to 500 (SDG&E wants to avoid over surveying customers)



- SDG&E has lower Chinese-preferred population vs PG&E & SCE, thus their oversample is likely to be smaller

### **Task 3. Development of the Survey Instrument**

The Evaluator must demonstrate experience with developing and testing survey instruments. It is likely that several drafts of the questionnaire will be required for review before a final is approved. Note that our goal in terms of survey content and length is to keep the survey manageable (not lengthy or arduous for respondents) while balancing the need to cover the metrics as well as any other necessary areas of questioning. The latter may include, for example, specific marketing communications channel recall.

### **Task 4. Survey Fielding**

As noted in Task 2, the Evaluator will propose a sampling approach to optimally balance survey coverage, representativeness, and cost. The IOUs will collect and make available to the Evaluator a database of participant enrollment data and contact information. The Evaluator is free to propose and price more than one option for the mode of the survey, including mixed-mode surveys. An optimized approach must be developed for fielding, taking into account the proposed mode of the surveys (e-mail, phone, and/or paper, or a combination thereof) and their respective costs. The Evaluator shall include fielding mode(s) that minimize response bias, especially among older and low-income populations.

The Evaluator must demonstrate the capability to support the proposed survey modes, including the ability for manual telephone dialing to comply with federal and state market research regulations.<sup>11</sup> The Evaluator must be able to support the translation of survey instruments into other languages, if necessary. The Evaluator must also develop a respondent incentive structure to optimally balance participation rates and cost.

### **Task 5. Reporting**

The Evaluator is required to describe baseline, interim, and final report deliverables, and the timing therefore. Note that these deliverables should be interpretative, strategic documents which provide an accurate “story” of what is happening within the marketplace in terms of customer awareness, understanding, attitudes and engagement.

## **4. REQUIRED QUALIFICATIONS**

**The Evaluator must be able to demonstrate the following minimum skills, capabilities, and experience.**

---

<sup>11</sup> The entity fielding surveys will have to certify compliance with the Telephone Consumer Protection Act of 1991 (“TCPA”), which established regulations for telemarketing and commercial sales calls, the federal Do-Not-Call (“DNC”) Act, and section 2874 of the California Public Utilities Code.

- Research experience and expertise with large-scale segmentation studies.
- Experience with research pertaining to marketing campaigns and tracking effectiveness.
- Exposure to working within a regulated industry, government, or the utility industry, preferably with the involvement of many stakeholders.
- A proven track record of managing relationships with clients and project stakeholders, and a demonstrated ability to collaborate on deliverables when changes occur.
- Prior project and task and cost efficiency.
- Ability to adhere to aggressive timelines and budgets.

## **5. COMPENSATION**

Pricing is detailed in Attachment 2 Pricing Workbook.

## **6. CONTRACT TERM**

Upon contraction execution till 12/31/2021

## **7. CONTACT INFORMATION**

### **PG&E**

Name: Elissa Pollock  
Title: Manager, Marketing Strategy  
Email: [EXPT@pge.com](mailto:EXPT@pge.com)  
Telephone: 415-973-5597

### **Evaluator (IPSOS)**

Name: Richard Elias |  
Title: VP Client Service, US West  
Email: [Richard.elias@ipsos.com](mailto:Richard.elias@ipsos.com)  
Telephone: 415-597-4025

Pricing Worksheet  
Evaluator for Statewide Rate Reform Marketing, Education and Outreach Program  
Cost Summary

Tasks	In-House Costs	Outsourced Costs	Expense	Total Costs
Task 1 - Project Initiation (PI) Meeting and Research Plan				
Task 2 - Sampling plan development for survey research				
Task 3 - Development of the Survey Instrument				
Task 4 - Survey Fielding				
Task 5 - Prereporting				
Out-of-pocket Expenses				
Total Costs	\$1,100,000	\$0	\$0	\$1,100,000

DO NOT EDIT.

Overview of the customer impacts. Numbers are approximate to give the order of magnitude. Please note – numbers will change.

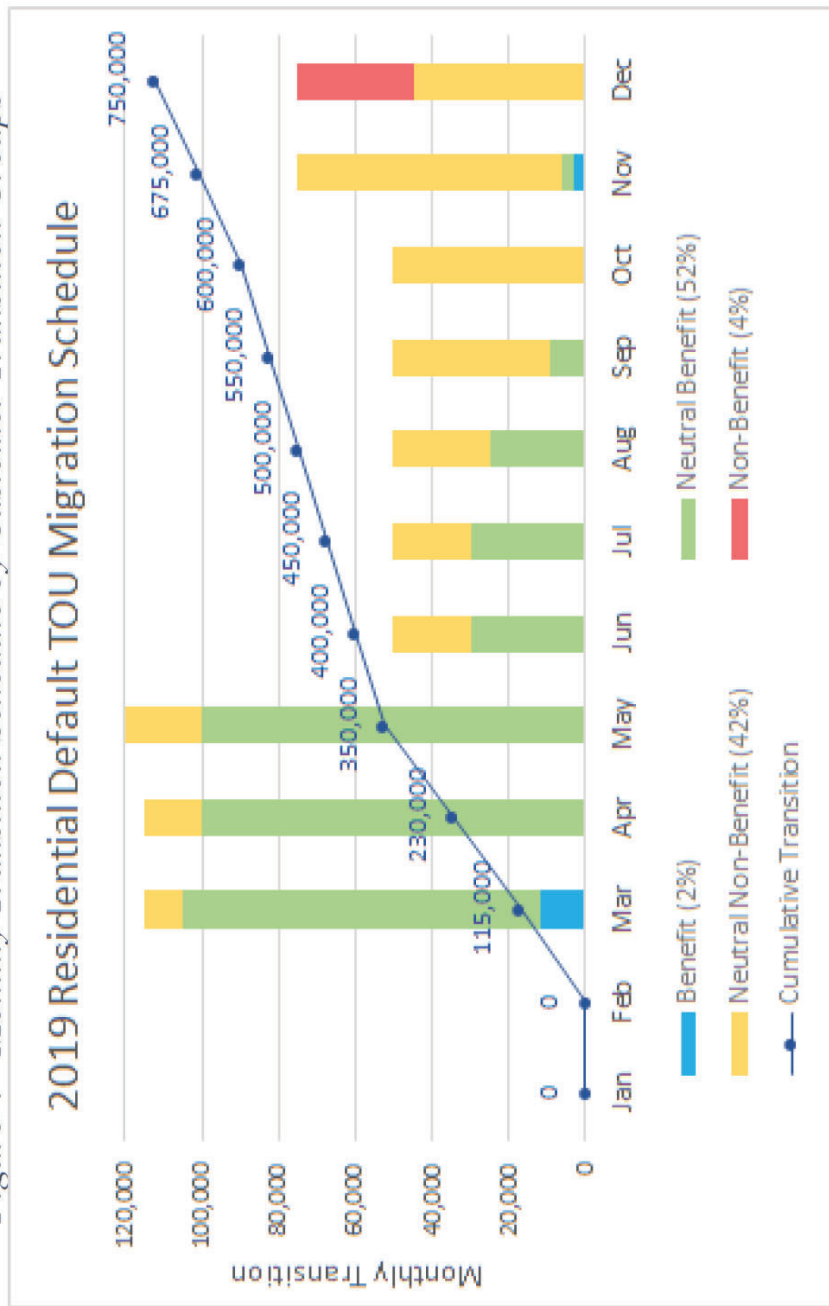
	SDG&E (March 2019)	SCE (October 2020)	PGE (October 2020)
Number of residential customers being defaulted as part of MASS default	750,000	3.3 million	2.7 million
• Number of benefiter	15,000	300,000	135,000
• Number of neutral benefiter	390,000	n/a	n/a
• Neutrals	n/a	2,200,000	1,350,000
• Number of neutral non-benefiter	315,000	n/a	n/a
• Non-benefiter	30,000	700,000	1,215,000
Customers to be excluded from default	374,000	800,000	2 million
		but this number doesn't include customers with less than 12 months of data	
Customers already on a TOU plan	147,000	421,554	299,000

Each of the IOUs define the impacted customers differently below is the SDG&E example.

Customer type	Bill impact	Percent of customer s	Number of customer s
Benefiter	Positive; see a savings of \$10 or more per month on their bill with no shift, based on historical data (12 months)	2%	15,000
Neutral Benefiter	Positive; see a savings of between \$0.01 up to \$10 per month on their bill	52%	390,000
Neutral Non-Benefiter	Negative; see a negative bill impact of between <\$0.01> and <\$10.00> per month on their bill	42%	315,000
Non-Benefiter	Negative; see a negative bill impact of \$10 or more per month	4%	30,000

## SDG&E Transition Schedule

Figure 4 - Monthly Transition Schedule by Customer Transition Groups



PG&E Transition Months

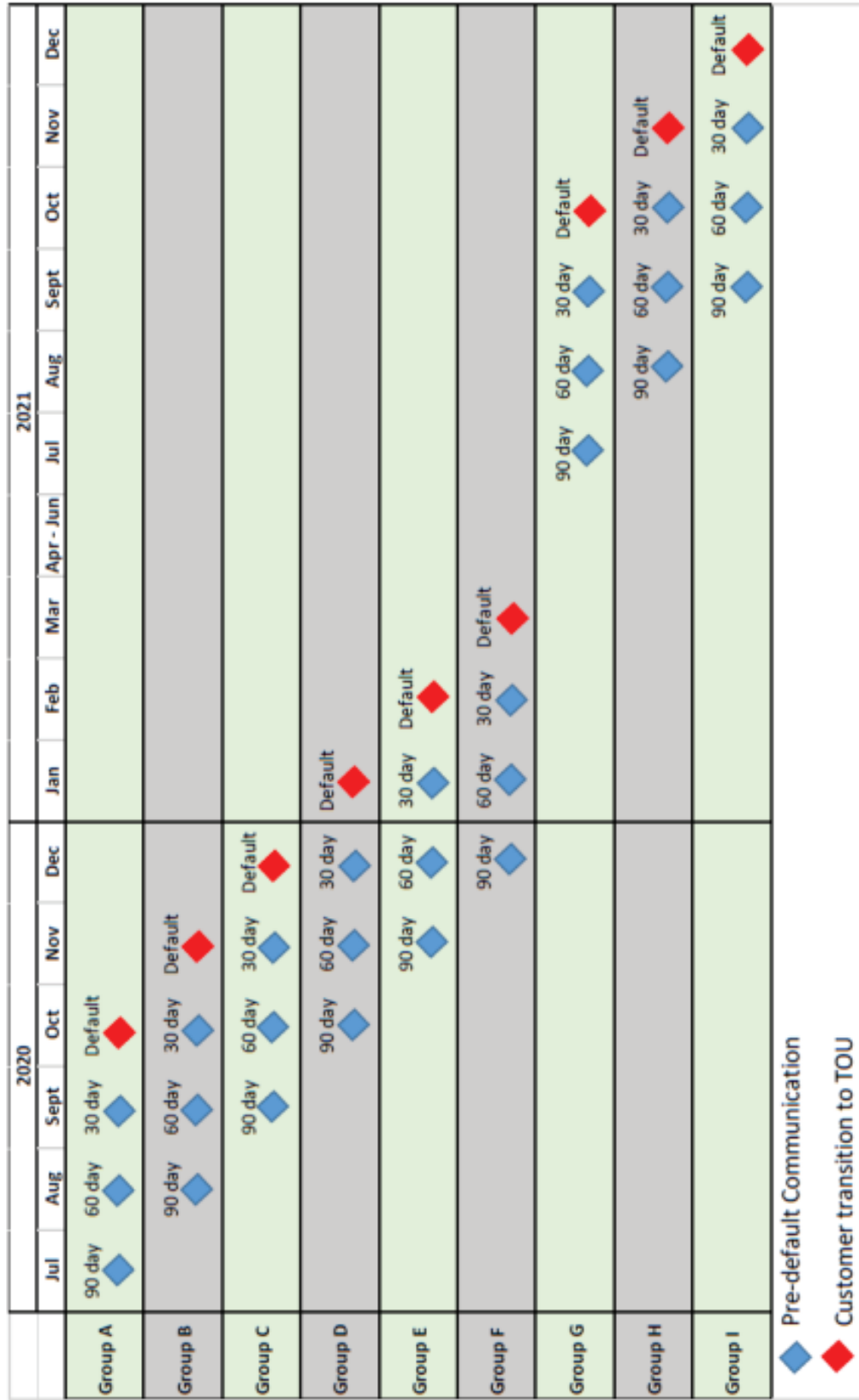
FIGURE 3-1  
MONTHS ACCEPTABLE FOR TRANSITION ROLL-OUT BY BASELINE TERRITORY

	Hot					Moderate			Cool			
	P	S	R	W	Q	X	Y	Z	T	V		
September	Y	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y
October	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
November	N	Y	Y	Y	N	N	Y	Y	Y	Y	Y	Y
December	N	Y	Y	Y	N	N	Y	Y	Y	Y	Y	Y
January	N	Y	Y	Y	N	N	Y	Y	Y	Y	Y	Y
February	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
March	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
April	Y	Y	Y	Y	N	Y	Y	Y	Y	Y	Y	Y
May	Y	N	N	N	N	Y	Y	Y	Y	Y	Y	Y
June	N	N	N	N	N	N	Y	Y	Y	Y	Y	Y
July	N	N	N	N	Y	N	Y	Y	Y	Y	Y	Y
August	N	N	N	N	Y	N	Y	Y	Y	Y	Y	Y



## SCE Transition Months

**Figure III-3**  
**IDTM Period Timeline For Group Transitions**





## Certificate Of Completion

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Document Pages: 16	Signatures: 2
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AutoNav: Enabled	Envelope Originator:
Envelopeld Stamping: Enabled	Ernest Aquilio Jr.
Time Zone: (UTC-08:00) Pacific Time (US & Canada)	77 Beale Street
	San Francisco, CA 94105
	EJA9@pge.com
	IP Address: 216.109.111.226

## Record Tracking

Status: Original	Holder: Ernest Aquilio Jr.	Location: DocuSign
7/20/2018 10:13:53 AM	EJA9@pge.com	

## Signer Events

Mark P. Campbell  
mark.campbell@ipsos.com  
VP & Treasurer  
Ipsos-Insight LLC

Security Level: Email, Account Authentication (None)

**Electronic Record and Signature Disclosure:**  
Accepted: 7/21/2018 6:48:26 AM  
ID: b38941f5-bd82-4410-9d97-db64a89f4da1

## Signature

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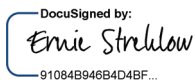
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Viewed: 7/21/2018 6:48:26 AM  
Signed: 7/21/2018 6:48:49 AM

Ernie Strehlow  
E4SB@pge.com

Gas Portfolio Manager/Services

Security Level: Email, Account Authentication (None)

**Electronic Record and Signature Disclosure:**  
Accepted: 7/24/2018 8:37:57 AM  
ID: f61d647f-5d5d-42d7-b134-3a80475dfd0e

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Using IP Address: 131.89.223.254

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Viewed: 7/24/2018 8:37:57 AM  
Signed: 7/24/2018 8:38:16 AM

## In Person Signer Events

## Signature

## Timestamp

## Editor Delivery Events

## Status

## Timestamp

## Agent Delivery Events

## Status

## Timestamp

## Intermediary Delivery Events

## Status

## Timestamp

## Certified Delivery Events

## Status

## Timestamp

## Carbon Copy Events

## Status

## Timestamp

## Notary Events

## Signature

## Timestamp

## Envelope Summary Events

## Status

## Timestamps

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Certified Delivered	Security Checked	7/24/2018 8:37:57 AM
Signing Complete	Security Checked	7/24/2018 8:38:16 AM
Completed	Security Checked	7/24/2018 8:38:16 AM

Payment Events	Status	Timestamps
Electronic Record and Signature Disclosure		

## **ELECTRONIC RECORD AND SIGNATURE DISCLOSURE**

From time to time, PG&E (we, us or Company) may be required by law to provide to you certain written notices or disclosures. Described below are the terms and conditions for providing to you such notices and disclosures electronically through your DocuSign, Inc. (DocuSign) Express user account. Please read the information below carefully and thoroughly, and if you can access this information electronically to your satisfaction and agree to these terms and conditions, please confirm your agreement by clicking the 'I agree' button at the bottom of this document.

### **Getting paper copies**

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### **Withdrawing your consent**

If you decide to receive notices and disclosures from us electronically, you may at any time change your mind and tell us that thereafter you want to receive required notices and disclosures only in paper format. How you must inform us of your decision to receive future notices and disclosure in paper format and withdraw your consent to receive notices and disclosures electronically is described below.

### **Consequences of changing your mind**

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. To indicate to us that you are changing your mind, you must withdraw your consent using the DocuSign 'Withdraw Consent' form on the signing page of your DocuSign account. This will indicate to us that you have withdrawn your consent to receive required notices and disclosures electronically from us and you will no longer be able to use your DocuSign Express user account to receive required notices and consents electronically from us or to sign electronically documents from us.

### **All notices and disclosures will be sent to you electronically**

Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through your DocuSign user account all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

### **How to contact PG&E:**

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: [pcpc@pge.com](mailto:pcpc@pge.com)

**To advise PG&E of your new e-mail address**

To let us know of a change in your e-mail address where we should send notices and disclosures electronically to you, you must send an email message to us at [pcpc@pge.com](mailto:pcpc@pge.com) and in the body of such request you must state: your previous e-mail address, your new e-mail address. We do not require any other information from you to change your email address..

In addition, you must notify DocuSign, Inc to arrange for your new email address to be reflected in your DocuSign account by following the process for changing e-mail in DocuSign.

**To request paper copies from PG&E**

To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an e-mail to [pcpc@pge.com](mailto:pcpc@pge.com) and in the body of such request you must state your e-mail address, full name, US Postal address, and telephone number. We will bill you for any fees at that time, if any.

**To withdraw your consent with PG&E**

To inform us that you no longer want to receive future notices and disclosures in electronic format you may:

- i. decline to sign a document from within your DocuSign account, and on the subsequent page, select the check-box indicating you wish to withdraw your consent, or you may;
- ii. send us an e-mail to [pcpc@pge.com](mailto:pcpc@pge.com) and in the body of such request you must state your e-mail, full name, IS Postal Address, telephone number, and account number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

**Required hardware and software**

Operating Systems:	Windows2000? or WindowsXP?
Browsers (for SENDERS):	Internet Explorer 6.0? or above
Browsers (for SIGNERS):	Internet Explorer 6.0?, Mozilla FireFox 1.0, NetScape 7.2 (or above)
Email:	Access to a valid email account
Screen Resolution:	800 x 600 minimum
Enabled Security Settings:	<ul style="list-style-type: none"><li>•Allow per session cookies</li><li>•Users accessing the internet behind a Proxy Server must enable HTTP 1.1 settings via proxy connection</li></ul>

\*\* These minimum requirements are subject to change. If these requirements change, we will provide you with an email message at the email address we have on file for you at that time providing you with the revised hardware and software requirements, at which time you will have the right to withdraw your consent.

**Acknowledging your access and consent to receive materials electronically**

To confirm to us that you can access this information electronically, which will be similar to other electronic notices and disclosures that we will provide to you, please verify that you were able to read this electronic disclosure and that you also were able to print on paper or electronically save this page for your future reference and access or that you were able to e-mail this disclosure and consent to an address where you will be able to print on paper or save it for your future reference and access. Further, if you consent to receiving notices and disclosures exclusively in electronic format on the terms and conditions described above, please let us know by clicking the 'I agree' button below.

By checking the 'I Agree' box, I confirm that:

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- I can print on paper the disclosure or save or send the disclosure to a place where I can print it, for future reference and access; and
- Until or unless I notify PG&E as described above, I consent to receive from exclusively through electronic means all notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to me by PG&E during the course of my relationship with you.

**PACIFIC GAS AND ELECTRIC  
COMPANY APPENDIX B  
(REDACTED)**



## Contract Work Authorization (CWA) Change Order

This is Change Order ("CO") No. 1 to Contract Work Authorization No. C9526 dated 7/24/2018 issued under and pursuant to the Blanket Agreement or Master Service Agreement No. C1172 dated 4/20/2010 (the "MSA") between the below-named Contractor ("Contractor"), a Michigan Corporation, and Pacific Gas and Electric Company ("PG&E"), a California corporation with its headquarters located at 77 Beale Street, San Francisco, California 94105. Contractor shall perform all Work under this CWA, as amended by this Change Order, pursuant to and in accordance with the terms and conditions of the MSA.

**Contractor's Legal Name:** Research Data Analysis, Inc.

This Change Order consists of 3 pages.

**Contractor's Address:** 450 Enterprise Ct.

Bloomfield Hills, MI 48302

**Project Name:** Evaluator for Statewide Rate Reform Marketing, Education & Outreach

**Job Location:** Various within the PG&E Service Territory

**CHANGES:** The Parties hereby modify the Contract Work Authorization referenced above as follows:

Total Contract Work Authorization value shall increase by \$23,000.00 from \$1,100,000.00, the original contract value to \$1,123,000.00, the new contract value.

PG&E hereby expands the work scope to include new Tasks


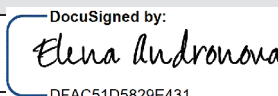
**ATTACHMENTS:** The following are attached to this CWA Change Order and incorporated herein by this reference.

Attachment No. 1, Page 3

<b>PRICING CHANGES:</b>	Previous Total CWA Value:	\$1,100,000.00
	Addition or Deduction:	\$ 23,000.00
	Revised Total CWA Value:	\$1,123,000.00

All other terms and conditions of the CWA, as it may have been amended by previous CWA Change Order(s), if any, shall remain the same.

**THE PARTIES, BY SIGNATURE OF THEIR AUTHORIZED REPRESENTATIVES, HEREBY AGREE TO THE TERMS OF THIS CWA CHANGE ORDER.**

PACIFIC GAS AND ELECTRIC COMPANY		CONTRACTOR: Research Data Analysis, Inc.	
<b>Signature</b>	 DocuSigned by: A1577063FB7B41E...	<b>Signature</b>	 DocuSigned by: DFAC51D5829E431...
<b>Name</b>	Larry Hernandez	<b>Name</b>	Elena Andronova
<b>Title</b>	Manager, Sourcing	<b>Title</b>	Vice President
<b>Date</b>	10/18/2018	<b>Date</b>	10/18/2018



ADMINISTRATION			
PG&E Negotiator	Pamela Wogsberg	Contractor Representative	Richard Elias
Phone	415-973-1032	Phone	415-597-4025
Email:	pew6@pge.com	Email:	Richard.elias@ipsos.com
Accounting Reference			

INTERNAL PG&E USE ONLY			
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Distribution of Copies:	<input type="checkbox"/> ARIBA Contracts ("CXXXX" series): Buyer uploads an executed copy in Ariba.	<input type="checkbox"/> Contractor (Signed Original Copy)	
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	<input type="checkbox"/> Invoice Approver	<input type="checkbox"/> Supervisor	
	<input type="checkbox"/> V.P.	<input type="checkbox"/> Sourcing/ Purchasing	
	<input type="checkbox"/> Director	<input type="checkbox"/> Law	



Change Order No. 1 increases the scope of work per the tasks below.

Additional scope of work agreed upon by the Energy Upgrade California (EUC) Team.

- i. Description of work to be performed, including detailed breakdown by identifiable tasks,
  - a. Original project specifications included:
    - i. n=2975 telephone surveys.
    - ii. Assumed incidence rate for telephone was 85% (i.e., 85 out of 100 people contacted would be the named person from customer list and responsible for IOU bill).
    - iii. A 50/50 distribution of landline/cell phone number interviews.
    - iv. Assumed length of interview was 15 minutes.

Task 7
  - b. Upon fielding, notable differences from original specifications were observed:
    - i. Incidence rate for land line customers is 82%, for cell phone customers 54%.
    - ii. Length of interview for land line customers is 19 minutes, for cell phone customers 16 minutes.
    - iii. Length of interview for online surveys is 10 minutes.
    - iv. Land line customer records are 40%, cell phone 60%.

Task 8
  - c. Due to the discrepancies, cost per telephone interview is significantly higher than budget. Ipsos team recommended, and EUC team including representatives from each IOU and CPUC agreed, to make the following changes to Wave 1 / 2018 fielding as a result:
    - i. Reduce total telephone surveys from n=2975 to n=1975.
    - ii. Increase total online surveys from n=2975 to n=3975 (thus maintaining combined online and telephone survey sample size).
    - iii. Shift distribution of telephone surveys from 50% cell phone / 50% land line to 60% cell phone / 40% land line.
- ii. Estimated cost of each task, and
  - a. Incremental cost of telephone surveys over original budget accounting for higher length, lower incidence, and reduced sample size is [REDACTED].
  - b. Incremental cost of online surveys over original budget accounting for lower length and increased sample size [REDACTED].
  - c. Incremental cost of shifting 10% of surveys from landline to cell phone is [REDACTED].
  - d. Total incremental costs: [REDACTED]
- iii. Expected date of completion of each task.
  - a. Project timeline is expected to be maintained.
  - b. We are striving to complete all telephone and online surveys by October 7.
- iv. Fees and Invoices
 

The total amount invoiced by Consultant, inclusive of all expenses and administrative costs, shall not exceed \$1,123,000.00.

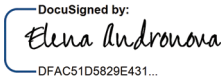
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Time Zone: (UTC-08:00) Pacific Time (US & Canada)	77 Beale Street
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	A3J1@pge.com
	IP Address: 216.109.111.131

## Record Tracking

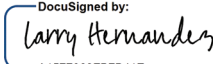
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## Signer Events

Elena Andronova		Timestamp
Richard.elias@ipsos.com	DocuSigned by: Elena Andronova DFAC51D5829E431...	Sent: 10/18/2018 2:25:01 PM
General Counsel		Viewed: 10/18/2018 3:16:53 PM
Ipsos-Insight, LLC		Signed: 10/18/2018 3:17:53 PM
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Certified Delivery Events	Status	Timestamp
Carbon Copy Events	Status	Timestamp
Notary Events	Signature	Timestamp
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Payment Events	Status	Timestamps
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# **PACIFIC GAS AND ELECTRIC COMPANY**

## **APPENDIX C**

BEFORE THE PUBLIC UTILITIES COMMISSION  
OF THE STATE OF CALIFORNIA

DECLARATION SUPPORTING CONFIDENTIAL DESIGNATION  
ON BEHALF OF  
PACIFIC GAS AND ELECTRIC COMPANY (U 39 E)

1. I, Kristi Wilkins [name], am a/the Senior Director of Solutions Marketing and Advertising [title] of Pacific Gas and Electric Company (“PG&E”), a California corporation. Keith Stephens [name of officer delegating authority to sign declaration], the Vice President of Corp Relations and Chief Communications Officer [title] of PG&E, delegated authority to me to sign this declaration. My business office is located at:

Pacific Gas and Electric Company  
77 Beale Street, Mail Code xxx  
San Francisco, CA 94105

2. PG&E will produce the information identified in paragraph 3 of this Declaration to the California Public Utilities Commission (“CPUC”) or departments within or contractors retained by the CPUC in response to a CPUC audit, data request, proceeding, or other CPUC request.

Name or Docket No. of CPUC Proceeding (if applicable):

Residential Rates Order Instituted Rulemaking R.12-06-013

3. Title and description of document(s):

1) Attachment A - Contract Work Authorization with Research Data Analysis, Inc. The CWA scope of work and budget describes the evaluation work to be conducted for Statewide Rate Reform Marketing, Education & Outreach.

2) Attachment B – Contract Work Authorization with Research Data Analysis, Inc. A change order increased the scope of work and resulted in an increase in the budget.

4. These documents contain confidential information that, based on my information and belief, has not been publicly disclosed. These documents have been marked as confidential, and the basis for confidential treatment and where the confidential information is located on the documents are identified on the following chart[INCLUDE IF ADDITIONAL DETAILS NECESSARY TO IDENTIFY LOCATION OF CONFIDENTIAL INFORMATION: , with further detail provided in Appendix A, which is incorporated into this declaration]:

Check	Basis for Confidential Treatment	Where Confidential Information is located on the documents
<input type="checkbox"/>	Customer-specific data, which may include demand, loads, names, addresses, and billing data  (Protected under PUC § 8380; Civ. Code §§ 1798 <i>et seq.</i> ; Govt. Code § 6254; Public Util. Code § 8380; Decisions (D.) 14-05-016, 04-08-055, 06-12-029)	
<input type="checkbox"/>	Personal information that identifies or describes an individual (including employees), which may include home address or phone number; SSN, driver's license, or passport numbers; education; financial matters; medical or employment history (not including PG&E job titles); and statements attributed to the individual  (Protected under Civ. Code §§ 1798 <i>et seq.</i> ; Govt. Code § 6254; 42 U.S.C. § 1320d-6; and General Order (G.O.) 77-M)	
<input type="checkbox"/>	Physical facility, cyber-security sensitive, or critical energy infrastructure data, including without limitation critical energy infrastructure information (CEII) as defined by the regulations of the Federal Energy Regulatory Commission at 18 C.F.R. § 388.113	

---

(Protected under Govt. Code § 6254(k), (ab); 6 U.S.C. § 131; 6 CFR § 29.2)

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Proprietary and trade secret information or other intellectual property and protected market sensitive/competitive data

(Protected under Civ. Code §§3426 *et seq.*; Govt. Code §§ 6254, *et seq.*, e.g., 6254(e), 6254(k), 6254.15; Govt. Code § 6276.44; Evid. Code §1060; D.11-01-036)

---



Corporate financial records

(Protected under Govt. Code §§ 6254(k), 6254.15)

---

☐ Third-Party information subject to non-disclosure or confidentiality agreements or obligations  
(Protected under Govt. Code § 6254(k); see, e.g., CPUC D.11-01-036)

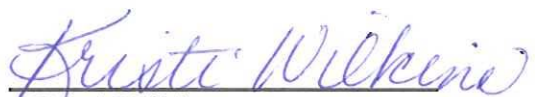
☐ Other categories where disclosure would be against the public interest (Govt. Code § 6255(a)) [NEED TO EXPLAIN HOW THE PUBLIC INTEREST SERVED BY NOT DISCLOSING THE RECORD CLEARLY OUTWEIGHS THE PUBLIC INTEREST SERVED BY DISCLOSURE]]:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

5. The importance of maintaining the confidentiality of this information outweighs any public interest in disclosure of this information. This information should be exempt from the public disclosure requirements under the Public Records Act and should be withheld from disclosure.
6. I declare under penalty of perjury that the foregoing is true, correct, and complete to the best of my knowledge.
7. Executed on this 12 day of April, 2019 at San Francisco [city], California.



Kristi Wilkins  
Senior Director, Marketing and Advertising  
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**PACIFIC GAS AND ELECTRIC COMPANY (U 39 E)**

Residential Rates Order Instituted Rulemaking R.12-06-013

**ATTACHMENT TO DECLARATION**

May 2, 2019

<b>ATTACHMENT NAME</b>	<b>DOCUMENT NAME</b>	<b>CATEGORY OF CONFIDENTIALITY</b>	<b>LOCATION</b>
Attachment A	Contract Work Authorization	Market sensitive/ competitive data	Page 11
Attachment B	Contract Work Authorization	Market sensitive/ competitive data	Page 3

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

AT&T	Downey & Brand	Pioneer Community Energy
Albion Power Company	East Bay Community Energy	Praxair
Alcantar & Kahl LLP	Ellison Schneider & Harris LLP	Regulatory & Cogeneration Service, Inc.
	Energy Management Service	SCD Energy Solutions
Alta Power Group, LLC	Evaluation + Strategy for Social	
Anderson & Poole	Innovation	
	GenOn Energy, Inc.	SCE
Atlas ReFuel	Goodin, MacBride, Squeri, Schlotz &	SDG&E and SoCalGas
BART	Ritchie	
	Green Charge Networks	SPURR
Barkovich & Yap, Inc.	Green Power Institute	San Francisco Water Power and Sewer
P.C. CalCom Solar	Hanna & Morton	Seattle City Light
California Cotton Ginners & Growers Assn	ICF	Sempra Utilities
California Energy Commission	International Power Technology	Southern California Edison Company
California Public Utilities Commission	Intestate Gas Services, Inc.	Southern California Gas Company
California State Association of Counties	Kelly Group	Spark Energy
Calpine	Ken Bohn Consulting	Sun Light & Power
	Keyes & Fox LLP	Sunshine Design
Cameron-Daniel, P.C.	Leviton Manufacturing Co., Inc.	Tecogen, Inc.
Casner, Steve	Linde	TerraVerde Renewable Partners
Cenergy Power	Los Angeles County Integrated Waste	Tiger Natural Gas, Inc.
Center for Biological Diversity	Management Task Force	
City of Palo Alto	Los Angeles Dept of Water & Power	TransCanada
	MRW & Associates	Troutman Sanders LLP
City of San Jose	Manatt Phelps Phillips	Utility Cost Management
Clean Power Research	Marin Energy Authority	Utility Power Solutions
Coast Economic Consulting	McKenzie & Associates	Utility Specialists
Commercial Energy		
County of Tehama - Department of Public	Modesto Irrigation District	Verizon
Works	Morgan Stanley	Water and Energy Consulting
Crossborder Energy	NLine Energy, Inc.	Wellhead Electric Company
Crown Road Energy, LLC	NRG Solar	Western Manufactured Housing
Davis Wright Tremaine LLP		Communities Association (WMA)
Day Carter Murphy	Office of Ratepayer Advocates	Yep Energy
	OnGrid Solar	
Dept of General Services	Pacific Gas and Electric Company	
Don Pickett & Associates, Inc.		
Douglass & Liddell		