

## PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE



April 20, 2020

**Advice Letter 5745-E  
5745-E-A**

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: Education and Outreach Proposal Pursuant to Decision 19-10-055**

Dear Mr. Jacobson:

Advice Letter 5745-E & 5745-E-A is effective as of January 27, 2020.

Sincerely,

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

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



**Erik Jacobson**  
Director  
Regulatory Relations

Pacific Gas and Electric Company  
77 Beale St., Mail Code B13U  
P.O. Box 770000  
San Francisco, CA 94177

Fax: 415-973-3582

January 27, 2020

**Advice 5745-E**

(Pacific Gas and Electric Company ID U 39 E)

Public Utilities Commission of the State of California

**Subject: Education and Outreach Proposal Pursuant to Decision 19-10-055.**

**Purpose**

Pursuant to Ordering Paragraph (OP) 13 of Decision (D.) 19-10-055, Pacific Gas and Electric Company (PG&E) submits this advice letter to summarize the Marketing Education and Outreach efforts associated with the deployment and operations of the commercial electric vehicle rate.

**Background**

On November 5, 2018, PG&E filed Application (A.) 18-11-003 seeking approval of its new commercial rates for load servicing electric vehicle service equipment (EVSE) and the creation of a new class of customers choosing to take service on the rate. Decision 19-10-055 (Decision) approved PG&E's application on October 24, 2019. The Decision requires PG&E to develop and execute a marketing, education and outreach (ME&O) plan emphasizing customer education and outreach to enhance customer understanding and acceptance of new rates while minimizing negative bill impacts.

**A. Program Overview**

PG&E's Commercial Electric Vehicle (CEV) rate ME&O plan intends to provide resources and support for current customers who use EV and infrastructure as well as potential customers seeking to enroll in this rate. The timeline for the ME&O plan extends over a three (3) year period from 2020 through 2022. Businesses and entities eligible for the new rate include small and medium businesses, multi-unit dwellings, local governments, transit agencies, EV service providers and other commercial entities. Section C, Target Audience, below contains more information related to the specific market segments and customer types targeted in this plan.

The associated ME&O materials will be developed both in terms of content and customer engagement preferences to address the diverse base of customers. PG&E's outreach

plan intends to leverage digital as well as traditional forms of customer communication such as Email, Teleservices, Direct Mail, and One-to-One outreach to provide education on enrollment processes, the structure of the new rate, options for customer notifications, and other available ME&O resources for current and potential customers.

Collaboration with external partners is an essential component of a comprehensive ME&O plan. PG&E plans to engage several third parties across funding agencies<sup>1</sup>, EV and energy providers, and statewide marketing organizations to maximize the reach of CEV rate information and outreach efforts.

The ME&O plan outlined in this document is designed to enhance customer understanding of the new rates as well as minimize customer costs associated with the subscription component. PG&E plans to use existing approved EV charging infrastructure programs for funding and amplify efforts by leveraging activities of relevant external entities.

In order to expedite the delivery of the CEV rate, PG&E is launching this rate in two phases. The first phase planned availability in May 2020 will include more basic functions; the second phase is planned to launch in October 2020 with full functionality.<sup>2</sup>

#### Phase 1: May-October 2020 (Interim Period)

Includes basic rate billing and subscription tracking. Specifics include:

- CEV rate calculation and billing.
- Capture customer subscription level for tracking purposes.
- Update customer bill with kW usage and subscription level.
- Basic customer enrollment process with limited functionality.
- Non-Solar (non-NEM) customer billing.

#### Phase 2: October 2020-ongoing

Includes full functionality of the rate. Specifics include:

- Customer subscription overage notifications.
- Subscription overage tracking and calculation of overage fees.
- Implementation of 3-billing cycle "Grace Period", with auto-adjustments to subscription level if overage occurs during the third and final billing cycle of the Grace Period.
- Solar (NEM) customer billing.

---

<sup>1</sup> This group includes state and local agencies such as California Air Resources Board (CARB), California Energy Commission (CEC), etc.

<sup>2</sup> PG&E's Request for Extension of Time to Comply with D.19-10-055 outlining the phased approach was granted by the CPUC Executive Director on December 24, 2019.

The ME&O plan targets specific market segments and customer types as outlined in the Decision and expanded in Section G, Implementation Plan, below.

## **B. Marketing Objectives**

PG&E aims to enroll customers that have or intend to install EV charging stations on the new CEV rate and to give them an operational understanding of the rate to minimize any customer costs related to subscription overages. This includes customers participating in PG&E's EV charging infrastructure programs—EV Charge Network, EV Fleet, and EV Fast Charge—and those participating in external infrastructure programs like the California Energy Commission's California Electric Vehicle Infrastructure Project (CALeVIP) as well as those funded via the private market.

The ME&O plan objectives are to:

- Educate customers about the new CEV rate.
- Enroll eligible customers on the rate.
- Deliver timely ongoing notifications once enrolled.

## **C. Target Audience**

Ordering Paragraph 13. b. directs PG&E to target specific market segments, including small businesses, multi-unit dwellings, local governments, transit agencies, and community-based organizations<sup>3</sup>. In addition to these specific target market segments, PG&E is also targeting medium and large business customers more broadly who are eligible for any of the approved EV charging infrastructure programs as well as externally funded programs.

To create an implementation plan that reaches the different target audiences, PG&E categorizes the customers in three distinct groups:

1. Transitioning Customers: These are existing customers in PG&E's EV charging infrastructure programs and those that have EV charging stations otherwise installed, who are not yet on the CEV rate but would benefit from enrolling in the new rate.
2. Potential Customers: These are customers who have yet to apply to one of PG&E's EV charging infrastructure programs or install EV charging stations externally but may be eligible for the CEV rate in the future and benefit from participation.

---

<sup>3</sup> PG&E sees community-based organizations not as an end customer to enroll in the CEV rate, but rather as an external entity that could be leveraged to reach targeted end customers.

3. Enrolled Customers: These are customers who are on the CEV rate and require ongoing education to minimize any potential negative bill impacts from subscription overages.

#### **D. External Partner Support**

Collaborating with external partners to increase awareness of the CEV rate is an important mechanism to expand marketing, education and outreach efforts beyond the reach of PG&E's EV charging infrastructure programs. External partners can be grouped into three categories:

- Funding Agencies: This group includes state and local agencies like California Air Resources Board (CARB), California Energy Commission (CEC), and the Air Quality Management Districts (AQMD). It also includes clean transportation program implementers like the Center for Sustainable Energy (CSE) and CALSTART. Each of these organizations plays a role in funding vehicles and/or infrastructure.
- EV and Energy Providers: This group includes vehicle manufacturers, EV charging providers, and community choice aggregators (CCAs). Each of these organizations provides a role in supporting vehicle adoption and fuel switching.
- Statewide Marketing Organizations: This category is unique in that it includes one specific organization—Veloz. Veloz has a mission to provide statewide marketing to increase EV adoption across California. This is an important group in targeting the light-duty EV market across PG&E's service territory.

Each of these partners has existing ME&O efforts related to increasing EV adoption throughout the state. Rather than duplicate their work, PG&E intends to support their efforts through collaboration and by developing resources and materials to enhance their efforts. More details about how we intend to collaborate with these partners is described below in Section G, Implementation Plan.

#### **E. Research and Messaging Approach**

With the launch of any new effort, P&GE looks to previous programs as a starting point to glean learnings and use these as foundational building blocks where appropriate. In the case of CEV rates, we have several completed research studies from the existing EV charging infrastructure programs to assist in understanding what motivates commercial EV customers and the barriers to entry they may have.

PG&E takes a test and learn approach when rolling out new efforts like the CEV rate. We test messaging prior to launch and we test the effectiveness of outreach in-market through ongoing research, metrics tracking, and customer feedback. This allows PG&E to continually adapt messaging to address the changing needs of the customer. PG&E expects to leverage its Business Advisory Forum for any potential research needs for the

CEV rate. The Business Advisory Forum is an online customer panel of businesses that provides feedback on rates and other associated utility programs.

In terms of messaging approach, customers prefer simple messaging that is easy to understand and gets to the point quickly. Customers want to know what the program is, who it is targeted to, and how they can take advantage. This What/Who/How approach will be fundamental to our efforts allowing PG&E to deliver clear and effective messaging to customers.

## **F. Message Development**

PG&E plans to leverage messaging frameworks established as part of each of the approved EV charging infrastructure programs in addition to discussing the many benefits of the CEV rate. Benefits include, but are not limited to more affordable EV charging, a simpler pricing structure, improved budget certainty, and cost-effective fuel switching. While these frameworks were developed for PG&E EV charging infrastructure programs, the benefits outlined are relevant for all customers that have installed EV charging stations.

In November 2019, PG&E tested two versions of a hypothetical CEV bill with customers in its Business Advisory Forum. Over 105 businesses responded with overwhelming consensus. The result was that customers would like to see subscription charges presented in kilowatts (kW) rather than introduce an alternate new “unit” type. The connected load from the charging equipment is in kW already so they prefer to stay consistent and work with kW.

Additionally, PG&E reached out to a handful of customers already engaged in the EV Charge Network and EV Fleet programs to explore the two versions of the bill. It was important to hear directly from actual target customers that are expected to enroll in the CEV rate. These customers reinforced the outcome from the Business Advisory Forum. As a result, PG&E has incorporated the customer preferred messaging into the development and implementation of the CEV rate.

Additional messaging testing using the Business Advisory Forum and feedback from enrolled customers will be pursued during the interim period from May 2020 to October 2020. The focus of that testing will be how best to communicate many of the technical aspects of the CEV rate. Examples include eligibility requirements, rate options for low and high subscription levels, subscription blocks, overage fees, potential automatic subscription level adjustments associated with the Grace Period, the hold out period for changing a subscription after automatic adjustment, limits on how many times subscription levels can be adjusted in a calendar year, and rate changes from low to high at the 100 kW threshold.

Finally, for customers who enroll in the rate during the interim period between May 2020 and October 2020, there will be one-time messaging required to transition them from the

interim period to full functionality. It will be important to ensure transitioning customers understand all the features that will change in October 2020 once the full rate is executed.

## **G. Implementation Plan**

Outreach will be embedded into existing PG&E EV charging infrastructure program efforts targeting customers that have enrolled or have yet to enroll but may be eligible. In addition, PG&E plans to implement tactics to provide more broad-based outreach to educate EV customers that do not plan on participating in PG&E's EV charging infrastructure programs.

For each of the three target audiences—Transitioning Customers, Potential Customers, and Enrolled Customers—the implementation plan will cover:

- Leveraging PG&E EV charging infrastructure programs—EV Charge Network, EV Fleet, and EV Fast Charge.
- External partner support and broad-based outreach—leveraging external entities to expand outreach and education efforts to reach all eligible customers.
- Additional considerations—support for market segments with fewer resources, including small businesses, multi-unit dwellings, local governments, and transit agencies.

### **1. Transitioning Customers – Implementation Specifics**

Transitioning Customers refers to existing customers in PG&E's EV charging infrastructure programs and those that have installed EV charging stations outside of PG&E's programs who are not yet on the CEV rate. This audience is likely to have one-to-one PG&E relationships in place either due to their participation in these programs or an existing relationship with a PG&E business representative.

For Transitioning Customers, the goal is to reach all customers currently participating in PG&E's EV charging infrastructure programs and those customers who installed charging infrastructure through PG&E's service planning process. The objective for both groups is to encourage them to switch from their existing rate to the new CEV rate in the cases where customer charges will be lower under the CEV rate.

#### **Leveraging PG&E EV Charging Infrastructure Programs**

Outreach to transitioning PG&E EV charging infrastructure program customers is incremental to any existing outreach efforts. Proposed incremental activities include:

- **PG&E One-to-One Outreach:** Direct-to-customer outreach is expected to be one-to-one phone calls and/or emails to customers that have an existing PG&E relationship.

- **Email:** Separate from PG&E one-to-one outreach, an overarching, multi-touch email campaign may be sent to an aggregated list of transitioning customers. This more centralized approach allows for tracking activity and triggered follow ups based on customer engagement or lack thereof.
- **Teleservices:** Separate from PG&E one-to-one outreach, additional outbound calls may be conducted to engage customers, should it be required to enhance reach and enrollment.

### **External Partner Support and Broad-based Outreach**

External partners can be an efficient stakeholder in reaching customers that have installed EV charging stations outside of PG&E's EV charging infrastructure programs and service planning process. Proposed incremental activities include:

- **Partner One-to-One Outreach:** PG&E intends to coordinate directly with external providers to expand awareness of the CEV rate. EV service providers that have been installing DC fast chargers outside of utility programs for several years. Coordinating directly with EV service providers will allow PG&E to increase the exposure to the CEV rate.
- **Partner Email:** PG&E plans to develop email templates that can be sent from external providers to their customers, showcasing the benefits of the CEV rate and linking back to PG&E's CEV web content and tools.

### **Additional Considerations**

Transitioning Customers includes small businesses, multi-unit dwellings, local governments, and transit agencies. Customers will have direct communication channels available to ask and answer any questions they may have.

Multi-unit dwellings: The EV Charge Network program has EV specialists trained to support the unique motivations and barriers of this market segment. This supports the requirements from Ordering Paragraph 13.b-c. from the Decision specific to multi-unit dwellings.

Transit Agencies: The EV Fleet program has a dedicated Customer Onboarding team work directly with fleet customers who are interested in adopting electric vehicles and participating in the EV Fleet program. The Customer Onboarding team is organized by industry and vehicle types (i.e. schools, transit, government, etc.). As a result, there is a dedicated Customer Onboarding specialist who has expertise specific to transit agencies and will be trained and equipped to answer questions as it relates to the CEV rate. This supports the requirements from Ordering Paragraph 13.b-c. from the Decision specific to transit agencies, a key target audience for the EV Fleet program.

## 2. Potential Customers – Implementation Specifics

Potential Customers refers to customers who have yet to apply to one of PG&E's EV charging infrastructure programs or install an EV charging station but may be eligible for the CEV rate and benefit from participation.

For Potential Customers, the goal is to encourage the installation of an EV charging station by showcasing how the CEV rate can reduce the fuel costs of an electric vehicle compared to gasoline or diesel and thereby improve the total cost of ownership.

### **Leveraging PG&E EV Charging Infrastructure Programs**

For EV Charge Network, there are no active marketing efforts as this program is currently oversubscribed. However, PG&E plans to engage customers on the program waitlist and those that are on the interest list. PG&E plans to tailor the messaging to both MUDs and workplaces that are included on this list. Proposed enhancements and incremental activities include:

- **PG&E Website:** Integrate CEV into existing EVCN website ([pge.com/evcharge](http://pge.com/evcharge)).
- **Email:** Conduct a multi-touch email campaign focused on customers that are either on the waitlist or have indicated interest in the EV Charge Network program.

For EV Fleet, lead generation is active and is planned to continue through the first three years of the CEV rate rollout. These efforts will be greatly enhanced by including the specifics of the CEV rate. Proposed activities include:

- **PG&E Website:** Integrate CEV into existing EV Fleet website ([pge.com/evfleet](http://pge.com/evfleet)).
- **Email:** Integrate CEV into the existing multi-touch email campaign to help influence key decision-makers and drive lead generation.
- **Webinars:** Integrate CEV into existing webinar strategy by developing webinar(s) directly on the topic of rates and/or integrate into other topics to increase interest in the program.<sup>4</sup>
- **Teleservices:** Integrate CEV into existing outbound call efforts. This may include new phone calls to potential customers and/or lead nurturing phone calls to customers who have shown an interest but have yet to apply to the program.

---

<sup>4</sup> In 2019, PG&E led webinars that integrated known details specific to the CEV rate.

- **Digital Media:** Integrate CEV into existing paid search<sup>5</sup> and display advertising<sup>6</sup> where appropriate to enhance engagement with a given target audience. Digital media plans to reach customers as they search for EV related content and visit relevant websites. Customers will be driven to PG&E's EV Fleet website to learn more.
- **Events:** Integrate CEV into existing event participation from speaking engagements to booth sponsorships to planned PG&E-hosted open house events.
- **eNewsletter:** Integrate CEV into the existing PG&E monthly Energy Advisor digital newsletter for businesses.

For EV Fast Charge, most of the customer acquisition is by the EV charging providers. PG&E will leverage these partners in addition to cross-promotion on PG&E's website. Proposed enhancements and incremental activities include:

- **PG&E Website:** Integrate CEV into existing EV Fast Charge website ([pge.com/evfastcharge](http://pge.com/evfastcharge)).
- **Webinars:** Develop webinar(s) targeted to EV charging providers directly on the topic of how the CEV rate supports DC fast charging adoption.

### **External Partner Support and Broad-based Outreach**

External partners are an important stakeholder at this early stage of the EV charging installation process. PG&E will work with its partners to outline specific ways to engage in marketing, education and outreach. The tactics outlined below provide an overview of potential efforts by the categories of external partners outlined in Section D, External Partner Support. Proposed incremental activities include:

- **Partner Collateral:** Develop email templates and CEV rate collateral (e.g. fact sheet or case study) that can be leveraged by external partners.
- **Partner Web Cross-Promotion:** Creation of web materials to cross promote the CEV rate on external partner's websites.
- **Partner Email Campaigns:** Collaborate with external partners to expand awareness of the benefits of the CEV rate via coordinated email campaigns. PG&E intends to leverage an existing framework established with the CSE where customers participating in the Clean Vehicle Rebate Project receive an email outlining the benefits of the residential EV rate and expand this to other clean transportation program implementers (e.g. CALSTART) and other incentive programs (e.g. Hybrid Voucher Incentive Program and CALeVIP).
- **Partner Webinars:** Coordinate with external partners to implement webinars where the CEV rate can showcase the fuel savings compared to gasoline and diesel. PG&E will coordinate with each of the external partners to identify

---

<sup>5</sup> Online paid advertisements on web pages that show results from search engine queries.

<sup>6</sup> Online paid advertisements that are typically a designed image, video, or a photo and copy.

opportunities similar to a recent 2019 webinar hosted by Veloz where PG&E showcased the EV Fleet program as well as the CEV rate.

For broad-based outreach, PG&E intends to develop tools and resources to support customers that are interested in installing EV charging stations but may not be targeted through PG&E EV charging infrastructure programs. Proposed enhancements and incremental activities include:

- **PG&E Website:** Integrate the CEV rate into existing commercial rate pages ([pge.com/tou](http://pge.com/tou)) for small, medium and large businesses. In addition, incorporate the rate into the existing residential EV rate page to target multi-unit dwellings.
- **Rate Comparison Tool:** Develop a rate comparison tool that compares the CEV rate to existing commercial rates. This tool will also be designed to provide a comparison of electric to the cost of diesel and gasoline for various vehicle types and charging levels.

### **Additional Considerations**

PG&E will work with Transit Agencies and Small Businesses as described in the “Transitioning Customers” section above.

### **3. Enrolled Customers – Implementation Specifics**

Enrolled Customers refers to customers who are on the CEV rate and require ongoing education to minimize any potential negative bill impacts.

For Enrolled Customers, the goal is to communicate often and in a timely manner to ensure they understand the CEV rate. By leveraging multi-touch and multi-channel notifications, customers will be informed of how to control their bill.

All efforts related to ongoing education and notifications for Enrolled Customers would be incremental to existing efforts related to PG&E’s EV charging infrastructure programs.

Outreach for Enrolled Customers focuses on notifying customers in a timely manner. Notifications will be used to welcome customers onto the new rate, communicate Grace Period details, inform customers about overages incurred, and educate them on other rate structure mechanics.

The Grace Period refers to the first three billing cycles after CEV rate enrollment or when a customer adds additional charging infrastructure that increases load. The purpose is to provide customers adequate time to adjust to the new CEV rate design. During the Grace Period, PG&E will notify customers via SMS and email if an overage occurs but will not charge customers for any Grace Period overages. On the third and final month of the Grace Period, if an overage occurs, the customer would be

automatically adjusted to a subscription level that appropriately matches the overage amount. If no overage occurred, no auto-adjustment would be made, and the customer will remain on their existing subscription level. Upon the conclusion of the Grace Period, overage fees will begin to be incurred.

PG&E will use email and SMS/text messages to communicate to customers if an overage occurs, whether that overage was during a Grace Period or not, and any subsequent fee as a result. Notifications will be sent within a 48-hour timeframe from the first overage occurrence in a given billing cycle and all subsequent new overage maximums within that same billing cycle to ensure timely communication with the customer. On-bill messaging will also be used to reinforce these details. Customers with questions will be directed to the website, a Customer Onboarding specialist, or the dedicated call center team to help.

For customers who are part of the interim period between May 2020 and October 2020, notification functionality will not be fully built. These customers will also not be subject to overage fees until October when the rate launches with full functionality. Instead, these customers are likely to receive outbound calls at the beginning of their enrollment and just before the change over from the interim period to the full launch in October 2020. Proposed incremental activity for the interim period includes:

- **Teleservices:** Conduct outbound calls during the interim period only between May 2020 and October 2020, when other notification channels won't be available yet. This is intended to keep customers informed; however, since no overage fees can be incurred during the soft launch period, fewer touch points are required.

In October 2020, the full functionality of the rate notifications is expected to be ready. Proposed incremental activities at that time include:

- **Direct Mail Welcome Letter:** After enrolling in the program, PG&E plans to send welcome letters to customers, providing broad education on the CEV rate. Direct mail outreach is estimated as one time only upon enrollment.
- **Email Notifications:** Emails help deliver messages in a timely manner and are planned to be used at enrollment (in addition to the direct mail welcome letter), during the Grace Period, and for every new maximum overage that occurs. Emails are a cost-effective channel preferred by many customers.
- **SMS Notifications:** SMS/Text messages, like emails, help deliver notifications in a timely manner and are planned to be used in conjunction with email notifications where applicable. This is a cost-effective channel that is often preferred to other forms of communication. SMS/Text messages are especially effective for customer alerts.
- **Bill Messages:** Will let customer know when they are in the Grace Period and when it has ended.

### **External Partner Support and Broad-based Outreach**

For Enrolled Customers, external partner support or broad-based outreach does not apply given they are already on the rate and PG&E oversees ongoing notifications to customers.

### **Additional Considerations**

As previously stated, a portion of the call center personnel will be trained to handle incoming calls related to the CEV rate. All CEV rate calls will be funneled through this call support staff, including any assistance required for small businesses.

The trained call center team will be the primary point of contact for enrollment during the interim period from May 2020 to October 2020, while online enrollment is anticipated for the full launch in October 2020. Additional support may be provided by the EV Fleet Customer Onboarding team as necessary.

## **H. Metrics and Tracking**

PG&E is evaluating ME&O effectiveness as part of existing EV charging infrastructure programs. New efforts identified herein will also be tracked for effectiveness by utilizing several key metrics. Tracking of metrics allows us to learn and improve throughout the ME&O process.

The overall approach to measuring effectiveness of PG&E's ME&O plan includes measuring the awareness and reach of outreach efforts, successful enrollment in the CEV rate, and ongoing engagement with enrolled customers.

PG&E plans to track and evaluate the success of its efforts based on the following metric types outlined in Figure 1.

<b>Metrics and Tracking</b>	
<b>Effort</b>	<b>Metrics</b>
Website	Unique Visitors, Page Visits, Page Views, Enrollments
Email	Delivered, Open Rates, Click Thru Rates
SMS	Delivered, Open Rates, Click Thru Rates
Webinars	Signed Up, Attended, Surveyed
Teleservices	Reached, Engaged
Digital Media	Impressions, Click Thru Rate, Landing Page Visits
Events	Reached, Signed Up, Attended, Surveyed
eNewsletter	Delivered, Open Rates, Click Thru Rates
One-to-one Outreach	Reached, Conversions
Direct Mail	Delivered
External Stakeholders	Total Relationships, Co-marketing Pieces Developed

Figure 1. Metrics and tracking overview.

Metrics defined

- Unique Visitors: track unique customers visiting pge.com CEV rate pages.
- Page Visits: track unique page visits to pge.com CEV rate pages.
- Page Views: track aggregate page views to pge.com CEV rate pages.
- Enrollments: track program enrollments.
- Delivered: track how many emails/SMS were delivered to customers.
- Open Rates: track how many customers opened an email/SMS.
- Click Thru Rates: track how many customers clicked within emails, SMS, or digital media.
- Signed Up: track total form completes for webinar sign up.
- Attended: track live attendance for webinars.
- Surveyed: track responses from surveys post webinar completion
- Reached: track how many customers were made aware via teleservices or events.
- Engaged: track successful teleservice conversations.
- Impressions: track customers who were presented a digital media advertisement.
- Landing Page Visits: track customer conversion from digital media advertisement shown versus engaged with.
- Conversions: track ratio of customers reached to customers enrolled in the program.
- Total Relationships: track number of stakeholders engaged to help amplify efforts.
- Co-marketing Pieces Developed: track number of co-marketing pieces developed for stakeholder use.

**I. Estimated Budget**

D.19-10-055 does not authorize a budget to be spent on the ME&O plan for the CEV rate. Instead, budget is to come from existing PG&E EV charging infrastructure programs including:

- EV Charge Network (D.16-12-065)
- EV Fleet (D.18-05-040)
- EV Fast Charge (D.18-05-040)

Outlined in Figure 2 are the proposed estimated budgets required from these programs:

<b>Estimated ME&amp;O Budget for CEV Rate</b>					
	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>Total</b>	<b>Ongoing Annual Costs</b>
<b>EV Charge Network</b>					
Efforts folded into existing work*	\$0	\$0	\$0	\$0	\$0
New efforts required**	\$146,110	\$0	\$0	\$146,110	\$0
<b>Subtotal for EV Charge Network</b>	<b>\$146,110</b>	<b>\$0</b>	<b>\$0</b>	<b>\$146,110</b>	<b>\$0</b>
<b>EV Fleet</b>					
Efforts folded into existing work*	\$94,666	\$77,750	\$77,750	\$250,166	\$77,750
New efforts required**	\$84,134	\$15,427	\$15,427	\$114,988	\$15,427
<b>Subtotal for EV Fleet</b>	<b>\$178,800</b>	<b>\$93,177</b>	<b>\$93,177</b>	<b>\$365,154</b>	<b>\$93,177</b>
<b>EV Fast Charge</b>					
Efforts folded into existing work*	\$0	\$0	\$0	\$0	\$0
New efforts required**	\$171,260	\$27,354	\$27,354	\$225,968	\$27,354
<b>Subtotal for EV Fast Charge</b>	<b>\$171,260</b>	<b>\$27,354</b>	<b>\$27,354</b>	<b>\$225,968</b>	<b>\$27,354</b>
<b>TOTAL ME&amp;O COST</b>	<b>\$496,170</b>	<b>\$120,531</b>	<b>\$120,531</b>	<b>\$737,232</b>	<b>\$120,531</b>

Figure 2. Estimated marketing, education, and outreach budget.

\*Efforts folded into existing work: Enhancements made to existing planned work to include CEV rate.

\*\*New efforts required: Incremental work not originally planned required to include CEV rate but will be covered by existing approved budgets.

PG&E does not intend to hire additional staff beyond what was proposed as part of the PG&E EV charging infrastructure programs that will fund the execution of this plan.

## J. Estimated Timeline

The following timeline describes how the ME&O plan is intended to be executed, with concentration on the first three years of the CEV rate availability. The implementation of this ME&O plan is dependent on the approval of this Tier 2 Advice Letter.

### Year 1: 2020

- Integrate into existing EV Infrastructure Program (e.g. EV Charge Network, EV Fleet, EV Fast Charge) activities to help drive customer engagement.
- Leverage External Partners to expand ME&O efforts to Transitioning and Potential Customers.
- Execute full implementation plan for transitioning customers, including one-to-one PG&E engagement, emails, and teleservices.
- Develop new webpage on pge.com specific to the CEV rate.
- Train necessary call center personnel.

- Set up full notification plan for October 2020, including direct mail welcome letter, email and SMS notifications, and all other communication required to educate Enrolled Customers.
- Enlist teleservices support for communicating to enrolled customers during first phase period from May 2020 to October 2020.
- Leverage external entities and proposed efforts as described in Section G: Implementation Plan.

Year 2 and ongoing:

- Conduct low-cost research where appropriate to get customer feedback.
- Continue integration into existing EV Fleet activities and improve where possible to help drive potential customer engagement. Track efforts for EV Charge Network and EV Fast Charge to see if similar opportunities exist.
- Continue execution of notification plan to educate enrolled customers and optimize where possible.
- Leverage external entities and proposed efforts as described in Section G: Implementation Plan.

**Tier Designation**

Pursuant to OP 13 of D.19-10-055, this advice filing is submitted with a Tier 2 designation.

The submittal would not increase any current rate or charge, cause the withdrawal of service, or conflict with any rate schedule or rule.

**Effective Date**

This Tier 2 advice letter will become effective on the date submitted, January 27, 2020.

**Protests**

Anyone wishing to protest this submittal may do so by letter sent via U.S. mail, facsimile or E-mail, no later than February 18, 2020 which is 22 days<sup>7</sup> after the date of this submittal. 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

---

<sup>7</sup> Because the final date of the protest period falls on a weekend and holiday, PG&E has moved the date to the following business day.

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  
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).

### **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 A.15-02-009. 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](mailto:Process_Office@cpuc.ca.gov). Send all electronic approvals to PGETariffs@pge.com. Advice letter submittals can also be accessed electronically at: <http://www.pge.com/tariffs/>.

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

Erik Jacobson  
Director, Regulatory Relations

Attachments

cc: Service List A.15-02-009



# 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 U39 E)

Utility type:

- ELC       GAS       WATER  
 PLC       HEAT

Contact Person: Annie Ho  
 Phone #: (415) 973-8794  
 E-mail: PGETariffs@pge.com  
 E-mail Disposition Notice to: AMHP@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) #: 5745-E

Tier Designation: 2

Subject of AL: Education and Outreach Proposal Pursuant to Decision 19-10-055

Keywords (choose from CPUC listing): Compliance,

AL Type:  Monthly  Quarterly  Annual  One-Time  Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #: D.19-10-055

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:

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:

Resolution required?  Yes  No

Requested effective date: 1/27/20

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:

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