

PUBLIC UTILITIES COMMISSION
505 Van Ness Avenue
San Francisco CA 94102-3298



Pacific Gas & Electric Company
ELC (Corp ID 39)
Status of Advice Letter 5859E
As of January 29, 2021

Subject: PG&E's Modification to its Disadvantaged Communities Demand Response Pilot Plan due to Covid-19

Division Assigned: Energy

Date Filed: 06-24-2020

Date to Calendar: 06-29-2020

Authorizing Documents: None

Disposition:

Withdrawn

Effective Date:

None

Resolution Required: No

Resolution Number: None

Commission Meeting Date: None

CPUC Contact Information:

edtariffunit@cpuc.ca.gov

AL Certificate Contact Information:

Kimberly Loo

415-973-4587

PGETariffs@pge.com

PUBLIC UTILITIES COMMISSION
505 Van Ness Avenue
San Francisco CA 94102-3298



To: Energy Company Filing Advice Letter

From: Energy Division PAL Coordinator

Subject: Your Advice Letter Filing

The Energy Division of the California Public Utilities Commission has processed your recent Advice Letter (AL) filing and is returning an AL status certificate for your records.

The AL status certificate indicates:

- Advice Letter Number
- Name of Filer
- CPUC Corporate ID number of Filer
- Subject of Filing
- Date Filed
- Disposition of Filing (Accepted, Rejected, Withdrawn, etc.)
- Effective Date of Filing
- Other Miscellaneous Information (e.g., Resolution, if applicable, etc.)

The Energy Division has made no changes to your copy of the Advice Letter Filing; please review your Advice Letter Filing with the information contained in the AL status certificate, and update your Advice Letter and tariff records accordingly.

All inquiries to the California Public Utilities Commission on the status of your Advice Letter Filing will be answered by Energy Division staff based on the information contained in the Energy Division's PAL database from which the AL status certificate is generated. If you have any questions on this matter please contact the:

Energy Division's Tariff Unit by e-mail to
edtariffunit@cpuc.ca.gov

June 24, 2020

Advice 5859-E

(Pacific Gas and Electric Company ID U 39 E)

Public Utilities Commission of the State of California

Subject: PG&E's Modification to its Disadvantaged Communities Demand Response Pilot Plan due to Covid-19

Purpose

Pacific Gas and Electric Company (PG&E) submits this Tier 2 advice letter (AL) to the California Public Utilities Commission (Commission or CPUC) pursuant to guidance afforded Utilities in their 2018-2022 Demand Response (DR) funding decision.¹ The specific reason for this AL is to make modifications to the current Disadvantaged Communities Demand Response Pilot ("pilot") due to the impact of Covid-19.

Background

Originally, Decision (D.) 18-11-029, OP 11 required that no later than four months before the start of the pilot or 60 days after the issuance of this decision,² whichever is earlier, each of the three Investor Owned Utilities submit Tier 2 advice letters that include plans for their pilot. In response, PG&E filed AL 5477-E on February 8, 2019, which included its proposed pilot plan. Subsequently, PG&E filed supplemental AL 5477-E-A on May 7, 2019, to update the geographic region of the pilot to include an additional zip code. Both ALs were approved by the CPUC effective June 6, 2019. Based on CPUC approval, Olivine, the pilot administrator, initiated the pilot consistent with the approved plan.

¹ D. 17-12-003, page 137 indicated that "...We authorize the Utilities to request non-controversial changes to program tariffs and implementation procedures via a Tier 2 Advice Letter. If uncertain whether a particular change is appropriate for review through the Advice Letter process, we encourage the Utilities to *consult with Commission Staff* before submitting an Advice Letter."

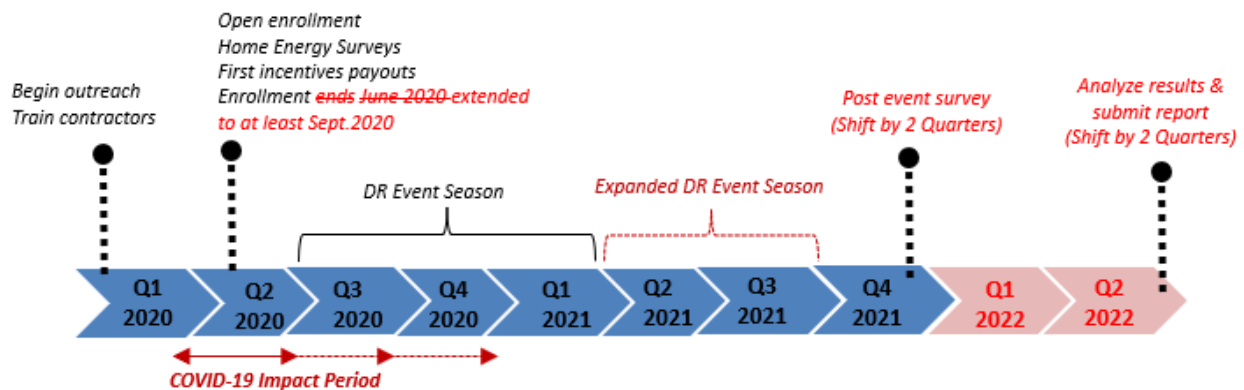
² D. 18-11-029 was adopted on November 20, 2018 and issued on December 10, 2018.

Discussion

Due to limitations imposed by Covid-19, including shelter-in-place orders, Olivine is proposing several modifications to address these challenges. Changes to maximize the success of the pilot include: 1) enabling new channels of recruitment, 2) extending the immediate enrollment period thereby necessitating an adjustment the original pilot milestones, 3) updating the illustrative budget, and 4) proposing other supporting modifications.³

The most immediate impact of Covid-19 on the pilot has been on outreach and marketing with Community Based Organization (CBO) partners. In person enrollment events had to be cancelled which resulted in fewer than expected participants for the 2020 Summer DR event season. In response, mitigation activities are being implemented to include the development of a new digital marketing plan, identification of new CBO partners, an extension of the enrollment window (from June to September of this year with the potential for future ongoing enrollments), and an expanded DR event season (original: Q3, 2020 to Q1, 2021; proposed: Q3 2020 to Q3, 2021). Consequently, the post DR season event survey will be pushed back by two quarters with the final results report to be completed in the first half of 2022.

A more detailed timeline for these modifications is shown below.



Other supporting elements are being proposed in order to provide additional flexibility based on the fluid nature of the Covid-19 situation. These include but are not limited to the following:

- Expanding the original targeted DR events from 20 to 30 to accommodate the extended timeline and to ensure current enrollees are engaged.
- Providing greater flexibility to update the Disadvantaged Community Advisory Group (DACAG) as needed.

³ The original enrollment target of 2,500 participants should now be considered aspirational.

- Updating the illustrative budget to: 1) provide greater flexibility in outreach, incentives, referrals, and 2) reflect a portion of the budget in 2022 based on the shift in the pilot timeline. The overall budget remains unchanged at the pre-authored level of \$1 million for the entire pilot duration.

Disadvantaged Communities Demand Response Pilot Plan

The modifications discussed above along with supporting changes have been incorporated into a modified pilot plan that is included in Attachments to this AL. Attachment 1 contains a track change (redline) version while Attachment 2 contains a clean version. It should be noted that certain modifications were made to improve syntax and readability and are not substantive.⁴

Protests

*****Due to the COVID-19 pandemic and the shelter at home orders, PG&E is currently unable to receive protests or comments to this advice letter via U.S. mail or fax. Please submit protests or comments to this advice letter to EDTariffUnit@cpuc.ca.gov and PGETariffs@pge.com*****

Anyone wishing to protest the incremental changes proposed in this submittal may do so by letter sent via U.S. mail, facsimile or E-mail, no later than July 14, 2020 which is 20 days after the date of this submittal. ⁵ Protests must be submitted to:

CPUC Energy Division
ED Tariff Unit
505 Van Ness Avenue, 4th Floor
San Francisco, California 94102

Facsimile: (415) 703-2200
E-mail: EDTariffUnit@cpuc.ca.gov

⁴ To minimize confusion, Attachment 1 (track change version) has text in two different colors displayed in the table for the "Proposed Schedule for Pilot." These color differences can be ignored. Similarly, the last page containing the display for the "Proposed Roles and Responsibilities for the Pilot" has not been changed from the prior version of the pilot plan submitted in AL-5477-E-A. The remaining track changes in the pilot plan denote intended modifications from the current pilot plan.

⁵ On May 22, 2020, PG&E and Olivine held a briefing with the Energy Division to both provide an update on the pilot and to present proposed modifications that are included in this AL. On June 5, 2020, PG&E received guidance from the Energy Division (ED) on the suitability of updating the pilot through the AL process. Furthermore, the ED clarified that only the incremental changes are subject to comment rather than the core pilot plan originally filed via AL 5477-E and AL 5477-E-A.

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, Rule 5.2, this advice letter is submitted with a Tier 2 designation. PG&E requests that this Tier 2 advice letter become effective on regular notice, July 24, 2020, which is 30 calendar days after the date of submittal.

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.17-01-012 et al. Address changes to the General Order 96-B service list should be directed to PG&E at email address PGETariffs@pge.com. For changes to any other service list, please contact the Commission's Process Office at (415) 703-2021 or at Process_Office@cpuc.ca.gov. Send all electronic approvals to PGETariffs@pge.com. Advice letter submittals can also be accessed electronically at: <http://www.pge.com/tariffs/>.

/S/

Erik Jacobson
Director, Regulatory Relations

Attachment 1 – Disadvantaged Communities Demand Response Pilot Proposal
(Redline)

Attachment 2 – Disadvantaged Communities Demand Response Pilot Proposal (Clean)

cc: Service List A.17-01-012 et al.



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: Kimberly Loo

Phone #: (415)973-4587

E-mail: PGETariffs@pge.com

E-mail Disposition Notice to: KELM@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) #: 5859-E

Tier Designation: 2

Subject of AL: PG&E's Modification to its Disadvantaged Communities Demand Response Pilot Plan due to Covid-19

Keywords (choose from CPUC listing): Demand Response

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

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #:

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: 7/24/20

No. of tariff sheets: 0

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 proposed¹: N/A

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

¹Discuss 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

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

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

Clear Form

Attachment 1

Disadvantaged Communities Demand Response Pilot Proposal

Revised June 24, 2020

(Redline)

Disadvantaged Communities Demand Response Pilot Proposal

Pacific Gas and Electric Company & Olivine

May 7, 2019 June 24, 2020

Background

D. 18-11-029 or the Decision (issued December 10, 2018) ordered the IOUs to each submit a Tier ~~4~~2 Advice letter within 60-days after the issuance of this Decision (by February 8, 2019) proposing a demand response (DR) pilot focused on providing direct economic benefits to disadvantaged communities (DACs). Total funding for the DAC DR Pilots over the period 2019-2022 is \$2.5 million across the three IOUs with PG&E allocated \$1.0 million with 10% of the budget dedicated to EM&V.¹

The Decision defines DACs as census tracts that score above 75th percentile using the CalEnviroScreen tool plus an additional 22 census tracts that score in the highest five percent of CalEnviroScreen's pollution burden, but do not have an overall CalEnviroScreen score because of unreliable socioeconomic or health data.²—

The Decision provides for the use of zip codes or census tracts in targeting for the purposes of this pilot and provides support for marketing and outreach efforts to increase enrollment and participation in DACs, while learning more about the target population and the residents' ability to respond to DR events.

This Pilot Proposal outlines how PG&E and its partner, Olivine, plan to implement the DAC Pilot in the 2018-2022 DR Program cycle. The program was implemented according to the original plan prior to the onset of the coronavirus pandemic. As a result of the pandemic and the subsequent shelter in place orders, PG&E and Olivine have revisited the program plan, with an overall focus on meeting the program's original enrollment target (2,500)³ through new

¹ Decision 17-12-003, Ordering Paragraph 58.

² D.18-11-029, p. 62. Link: <https://oehha.ca.gov/media/downloads/calenviroscreen/fact-sheet/ces30factsheetfinal.pdf> D.18-11-029, p. 62. Link: <https://oehha.ca.gov/media/downloads/calenviroscreen/fact-sheet/ces30factsheetfinal.pdf>

³ The program team would like to reserve the right to adjust the original enrollment targets in Q3, 2020 pending our ability to be able to organize the in-person enrollment events in Fresno as planned and aligned with the in-person communication needs of reaching a hard

channels of digital marketing and remote enrollment assistance campaigns. This revised plan strengthens our ability to provide economic assistance through program incentives to Fresno DAC residents negatively impacted by the pandemic.

This revision to the pilot proposal is a result of changes to the program marketing, implementation and operations required due to the Covid-19 shelter in place order put in place for California (March 19th for Bay Area and March 23rd for the State of California). The Covid-19 shelter in place orders in California have impacted the program team's ability to work with local community-based organizations who planned to conduct outreach and marketing needed for program enrollment. Since the target population includes a high proportion of low income and hard to reach customers, a local on-site engagement approach, originally planned for the program, was a key strategy to reach the target enrollment numbers. Given the shelter-in-place order and concerns about the health and welfare of those involved, this plan has been revised to adapt to the current Covid-19 situation.

Pilot Target Location

Using the methodology Olivine developed that was adopted under D. 18-11-029, this pilot would target census tracts in zip codes that qualify as DACs within a 10-mile radius of the Malaga natural gas fired peaking plant ~~in south Fresno~~.⁴ The pilot will include customers residing in zip codes: 93701, 93702, 93703, 93721, 93725, 93706 and 93728, which fully encompasses south-central Fresno community selected for the Community Air Protection Program under Assembly Bill (AB) 617.⁵ Geographically, this community is bounded by Golden State Boulevard to the west, McKinley Avenue to the north, Chestnut Avenue to the east, and includes the small community of Malaga at the southern tip of the

to reach population base. If the shelter-in-place continues to impact program implementation a realistic enrollment target would be 500 customers.

⁴ The Malaga Power Plant is a 96 MW gas fired peaking plant located in south Fresno.

⁵ AB 617 called for the California Air Resources Board (CARB) to establish the Community Air Protection Program (CAPP). This Program's focus is to reduce exposure in communities most impacted by air pollution. -If the CAPP program expands the geographic footprint of South-Central Fresno prior to the commencement of the DAC DR Pilot, then PG&E requests flexibility to adjust zip codes accordingly. Moreover, the pilot may identify other zip codes for assessment as part of a control group to support the EM&V process.

boundary.-

~~The census tracts in these zip codes are DACs that fall within a 10-mile radius of the Malaga natural gas fired peaking plant in south Fresno.~~ These DACs have some of the highest environmental justice (EJ) percentile rankings in the State. The average overall CalEnviroScreen Score and Population Characteristics for the area values are both above the 97th percentile. Of the approximately 25,000 residential households within this target area, approximately 75% are California Alternative Rates for Energy (CARE)⁶ eligible.

Pilot Strategy

During hot summer afternoons the Malaga powerplant can be dispatched to meet high energy demand in the greater Fresno area.⁷ Distribution lines serving South Central Fresno can also experience high loading conditions during these same periods.

This Pilot intends to target ~~2,500~~ residential customers within a 10-mile radius of the Malaga power generation plant. Using a statistically relevant sample size near a gas fired peaking plant will provide insights for future program designs that are applicable and scalable for use in similarly situated households throughout the Central Valley area (approximately 500,000 households).

The Pilot will collect demographic, psychographic, and energy usage data in order to evaluate the willingness and ability of residents within this community to participate in DR either by reducing or shifting load in response to both grid and environmental signals. At scale and over time, these types of DR actions could materially reduce the need for dispatch and cycling of peaking plants and reduce high loading on distribution lines ~~potentially extending the life of that equipment.-.~~

Marketing and outreach efforts to increase understanding and engagement in DR programs will be tested to better understand how to access diverse and hard to reach populations within the targeted community, how to overcome challenges and barriers to participation, and ways to provide additional value to both

⁶ CARE provides for discounted rates based on income eligibility.

Link: <https://www.pge.com/care/>

⁷ All communities in the Pilot area fall into the Fresno sub-Load-Aggregation-Point (subLAP) as currently defined by the CAISO.-

participating and non-participating residents by leveraging other demand side management program options available.

The following areas will be explored during the study period.

- **Awareness and Willingness to Participate:** What is the current level of awareness of DR program availability and understanding of how DR programs create value for customers and the community? What is the current level of interest in participating in demand response programs? If possible, compare responses of DAC households to non-DAC households.
- **Energy Use and Ability to Participate:** How do the different DAC households use energy in their homes? How well can DAC households respond to and participate in DR programs? If the population is large enough, we intend to compare usage and responses by households in and outside of DACs.
- **Outreach:** What are the best methods to reach different types of households in DACs, including those that are hard to reach?
- **Messaging:** What kind of messaging resonate best with households?
- **Benefits:** What kinds of DR incentives and program offerings will be of greatest value to DAC households and benefit them the most?

Theory of Pilot Intervention

The Pilot leverages and expands on Olivine's recently completed Community Energy Initiative (CEI) based in Richmond, CA. The CEI was a limited study (50 participants) that provided incentives for survey participation:

- How and when do individuals use energy in their homes?
- Can a household reduce energy when requested?
- Will households participate in DR programs?
- Are there observed differences between households in DACs and those not in DACs but proximate to DACs?
- What are important concerns of households for their communities?
- Do carbon emissions fit into those concerns and to what extent?
- What methods and approaches for outreach are most successful?
- How much facility do households have with technology?

Mobile application tools were developed to provide awareness for energy usage

and messaging capabilities for load reduction through behavioral demand response.

Outreach and Enrollment: The Pilot intends to leverage and expand the study in Richmond within the targeted zip codes in Fresno. As was the case in Richmond social media and community organizations will be used for outreach, to the extent consistent with the governor's Covid-19 directives. In Fresno, partnerships will be formed with local community-based organizations to reach the diverse populations. Marketing and educational materials will be developed in the population's predominant native language (e.g. Spanish) beginning in the last quarter of 2019. In addition to social media and community organizations, PG&E and Olivine will attempt to engage one or more Energy Savings Assistance program contractors as well as one or more San Joaquin Valley Pilot Community Energy Navigator located in the south-central Fresno area.⁸ Training on the Pilot program design and use of the Olivine on-line application will be rolled out in the first quarter of 2020 to support community awareness, outreach and initial enrollment efforts.

Participants will be provided access to an existing easy-to-use mobile app and website, as was used in Olivine's CEI in Richmond, to support customer engagement and education throughout the pilot and to facilitate communications, collection of surveys and other direct participant information. In order to provide for as many customers as possible there will be both behavioral as well as automated technology enabled options offered and enrollment processes will include online capabilities to provide for near real-time validation of customer eligibility. ~~The formal enrollment period is expected to end by the summer of 2020 DR event season and to include initial surveys and assessments.~~

The initial enrollment phase has been extended from June 2020 until September 2020 with consideration for enabling additional enrollments after that time period.⁹ Initial surveys and assessment will be included in this enrollment phase. A critical enrollment strategy is the use of local partnerships for marketing and outreach, in a manner consistent with Covid-19 related limitations. While

⁸ These entities provide services and are both well-known and trusted in the community. Therefore, their participation would be useful in the recruitment effort.

⁹ Enrollment period flexibility supports maximizing the number of participants and addressing potential attrition.

initially in person program training and enrollment events were a cornerstone of this strategy the team has revised the approach to eliminate gatherings and limit direct contact.

This revised approach includes:

- Developing new bilingual digital marketing collateral (videos, testimonials, radio, television, webinars, etc.).
- Launching new partnerships with organizations who are able to co-market more effectively without in-person contact and to reach the population most in need (e.g. via food banks, charity organizations).
- Hiring local outreach ambassadors from the targeted population to do marketing following social distancing guidelines.

Demand Response Testing: -During the Pilot there will be a study period for both home energy summer peak shaving and winter/spring load shifting¹⁰ - to analyze the capabilities of the population to provide both load reduction as well as shift consumption into periods of excess renewable supply.

The summer ~~of 2020~~season is planned to be the peak shaving event study season~~-. Late afternoon and early evening hours will be used for DR events targeting high value times when the Malaga power station may be dispatched and/or PG&E substations may have high loading. -The effectiveness of varying triggers such as grid need, pricing, and air quality will be tested. -Market price signals as well as forecasts of potential dispatch of the Malaga power-plant will be used.~~

Similarly, during the winter months~~-of 2020-2021, home,~~ energy excess supply will be studied focusing on the capabilities of the participants to shift load usage to match available renewable energy supply.¹¹

¹⁰ In the context of the Pilot, a load shift event may consist of the customer being informed that clean energy is abundant during certain periods. -The customer will have discretion over how to respond to this information.- For example, providing information that shifting use of electric clothes drying from a rainy Friday evening to a sunny Saturday morning on certain days during the winter and spring will result in significantly lower GHGs and other air emissions related to that use of energy.~~-If a market integrated load shift product that customers can participate in is approved during the timeframe of the Pilot, PG&E and Olivine will assess whether such product can be reasonable integrated into the Pilot design.~~

¹¹ Due to higher levels of renewables especially solar generation, California can experience times of over-supply of generation especially during non-summer months. -This is sometimes referred to as the “belly of duck curve.” -

Link:- <https://www.nrel.gov/docs/fy16osti/65023.pdf>

Up to ten (10) DR events will be targeted for each study season and incentives will be paid for both specific events as well as consistent performance and participation in surveys. -The Pilot will include the measurement and evaluation activities to determine the value of the capabilities to the targeted pilot location as well as broader generalizations at scale, responses to differing triggers and impacts from the measured performance.

Due to Covid-19 shelter in place order, the program team does not expect to meet the enrollment targets for summer 2020 and plans to utilize the summer of 2021 as the main summer peak shaving DR event study season with up to ten (10) DR events during that period as planned. Furthermore, up to five (5) DR events are planned for the summer of 2020 to keep the early adopters of the program engaged and motivated during this period. This shift in approach will require a modification in the program's overall schedule and an expanded DR event season for a total of 30 events as opposed to the previously plan of 20 events. Therefore, the program will need to pay incentives to customers for the additional events over a longer period of time.

Market Integration

The Pilot operations will leverage the existing capabilities and infrastructure already deployed by Olivine in other PG&E pilot programs, including the Supply Side II (SSP II) and Excess Supply (XSP) DR Pilot.¹² One or both of these existing pilots will serve as the mechanism for integration of the DAC DR Pilot into the CAISO wholesale market- if feasible.¹³

Amount and Form of Economic Benefits

The Pilot intends to provide 50%a significant portion of the budget monies directly to participantsFresno DAC residents within the Community.¹⁴

Participants will receive direct incentives for providing responses to surveys and

¹² Olivine's webpage provides an overview of the Supply Side II Pilot and Excess Supply Pilot

Link (SSP-II): <https://olivineinc.com/services/our-work/ssp/> -

Link (XSP): <https://olivineinc.com/services/our-work/xsp/>

¹³ The program's original enrollment targets of 2,500 customers was based on the estimate of the number of participants needed for an aggregation sufficiently large for participation in the wholesale market as a CAISO resource.

¹⁴ The Pilot's Participation and Outreach Budget category includes direct incentives, payments for referrals, local support and related fees within the Community.

for participating in DR events. ~~Participants~~Active participants are expected to ~~have the opportunity to earn up to \$250 (subject to change in final pilot design)~~approximately \$200 - \$270 in direct incentives through some combination of initial Pilot survey completion, participation in Pilot peak shaving and load shifting events, ~~and~~ completion of the final Pilot survey. ~~and enrollment referrals.~~¹⁵

Through energy monitoring, awareness and education, participants may have the opportunity to save energy and reduce their energy bills. The Pilot will coordinate with other PG&E programs to efficiently reach the largest number of customers and provide needed services. Eligible participants may also receive free technology installation and support to reduce their energy usage and to leverage other available Demand Side program options and incentives.

Pilot Analysis and Assessment Including Cost-Effectiveness

As these DAC DR Pilots are first of their kind, PG&E and Olivine will work with stakeholders and Energy Division Staff to develop a plan for quantitative and qualitative evaluation of the Pilot, ~~including.~~ The evaluation will include an assessment of program design and delivery, customer experience, load impacts, environmental impacts, and cost-effectiveness. PG&E and Olivine will develop key performance indicators and will report out annually and at the end of the pilot in a fashion similar to the current SSP-II and XSP Pilots. ~~These key~~ performance indicators will be reflective of customer benefits including safety, reliability affordability, awareness and access. Additionally, consistent with guidance provided in D. 18-11-029, key performance indicators will be developed and reported reflecting potential air quality improvements related to the pilot.

Consumer Protection

No customer will be charged any fee for participating in the Pilot nor will there be any penalty for exiting the Pilot once enrolled. ~~For low income customers~~ participating in the Pilot no out-of-pocket payment will be required ~~to receive~~for

¹⁵ Illustrative Example: \$30 for Home Energy Survey + \$190 for Energy Savings Events + \$30 Customer Experience Survey + \$20 for Enrollment Referral = \$270

demand response automation equipment, ~~such as smart plugs or smart thermostats beyond redemption of “points” earned through Pilot participation.~~

Furthermore, Pilot test events will be structured in a way that will attempt to either reduce energy consumption (peak shaving) or reduce energy costs (load shifting) or both.

Coordination with Other ~~IOU's~~ IOUs

PG&E's lead on the DAC DR Pilot did reach out to both SCE and SDG&E leads to discuss opportunities for collaboration and to ensure that PG&E was not duplicating the learnings that either SCE or SDG&E were planning from their DAC DR Pilot design.-

Disadvantaged Community Advisory Group (DACAG)

On January 25, 2019 the DAC Pilot proposal was presented to the DACAG at its meeting in Fresno. Feedback from the DACAG was incorporated into this proposal. During that meeting plans for coordination were discussed to update the DACAG ~~at least annually through~~ periodically during the pilot lifecycle and the DACAG will consider forming a subgroup to coordinate more frequently with the DAC DR pilot.¹⁶

Justification for Choice of Third-Party

PG&E has chosen to partner with Olivine for this Pilot based on Olivine's wealth of knowledge related to demand response program and platform design including all aspect of CAISO market integration. In addition, Olivine ~~has recently~~ previously completed the Richmond Community Energy Initiative which allows this Pilot to extend ~~and leverage~~ Olivine's learnings from that work as well as leverage the ~~on-~~ line mobile application that Olivine built for that earlier study. -Finally, the partnership between PG&E and Olivine allows this Pilot to leverage potentially utilize existing platforms that Olivine ~~has already developed~~ currently uses for PG&E's existing SSP II and XSP Pilots.

Customer Data Sharing

Customer data for this pilot would fall under Rule 27 addressing primary purpose use. PG&E's existing Master Service Agreement with Olivine includes provisions on confidentiality and data security regarding the handling of confidential information and PG&E Data from PG&E or its customers. This is consistent with the process established for the two existing pilots (SSP II and XSP) for which Olivine serves as the primary contractor and PG&E as the pilot administrator.

Additional Supporting Information

The remaining pages provide addition information, including the proposed schedule for the pilot, a proposed illustrative budget and the proposed roles and responsibilities between PG&E and Olivine.

¹⁶ The Pilot team is awaiting confirmation of date for the next update, subsequent to COVID. A subgroup has not been formed.

Proposed Schedule for Pilot

The changes to the overall pilot schedule due to Covid-19 impacts include the following:

- Expansion of the program initial outreach and engagement period by one quarter, enabling ongoing enrollments.
- Expansion of the DR event season by two quarters in order to collect data for a peak shaving summer season with a good sample size:
 - Original DR event season Q3 2020 – Q1 2021 (3 quarters, 20 events total)
 - New proposed DR event season Q3 2020 – Q3 2021 (5 quarters, 30 events total)
- Expansion of the overall program implementation period by two quarters.

<u>Q1 2019</u> – Submit Tier II Advice Letter-	<u>Q2 2019</u> – Tier II Advice Letter Approved	<u>Q3 2019</u> – Finalize scope of work and contract provisions- with Olivine.	<u>Q4 2019</u> – Identify Fresno area community organizations and plan- social media outreach.
<u>Q1 2020</u> – Begin outreach through community organizations and social media. -Train contractors on DAC DR Pilot design and Olivine on-line application.	<u>Q2 2020</u> – Open <u>COVID-19 shelter in place</u> impacts the open season for enrolling customers into the Pilot- <u>due to cancelled site visits and planned enrollment events.</u> <u>Program develops new digital marketing plan, collateral, and outreach strategy.</u> Completion of initial pilot participation surveys. Participating customers earn first pilot rewards.	<u>Q3 2020</u> – <u>Continue open season for enrolling customers into the Pilot. Initial enrollment period expanded to September 30, 2020 and enable ongoing enrollments in order to maximize the opportunity to meet target numbers.</u> Peak shaving event season with up to 105 peak shaving events of 1-2 hours during early evening hours. <u>Disbursement of initial pilot participation surveys.</u> Participating customers earn peak shaving event awards <u>first pilot rewards.</u>	<u>Q4 2020</u> – Begin load shifting event season with up to 5 load shifting events of 1-2 hours duration on weekends during periods of excess renewable generation. Participating customers earn load shift event awards. <u>Completion of initial pilot participation surveys.</u> <u>Participating customers continue to earn first pilot rewards.</u>
<u>Q1 2021</u> – Continue load shifting event season with up to 5 additional load shifting events.-	<u>Q2 2021</u> – Post <u>Continue load shifting event season survey.</u> Participants who engaged in with up to 5 or more peak shaving and/or 5 or more load shifting events can earn additional rewards for completing	<u>Q3 2021</u> – Olivine compiles survey and event season data and publishes DAC DR Pilot Final Report. <u>Q3 2021 – Peak shaving event season with up to 10 peak shaving events of 1-2 hours during early evening hours. Any participating customer can earn peak shaving event awards.</u>	<u>Q4 2021</u> – <u>Post event season survey.</u> <u>Participants who engaged in 5 or more peak shaving and/or 5 or more load shifting events can earn additional rewards for completing post event season survey.</u> <u>Learnings from the initial</u>

	post event season-survey load shifting events.		DAC DR Pilot <u>participant survey, and DR event performance</u> are incorporated into PG&E's post-2022 program design and funding application (to be filed in November 2021).
<u>Q1 2022 – Continue obtaining results from the post event season results. Olivine compiles survey and event season data and prepares DAC DR Pilot Final Report.</u>	<u>Q2 2022 -- Submission of DAC DR Pilot Final Report.</u>		

Proposed Illustrative Budget for Pilot¹⁷

Budget Category	2019	2020	2021	<u>2022</u>
Incentives <u>Participation and Outreach</u>	<u>\$107,500</u>	\$250,000 <u>\$500</u>	\$250 <u>187</u> ,000	<u>\$20,000</u>
Marketing	\$75,000	\$75,000		
Administration	<u>\$0</u>	\$50 <u>140</u> ,000	\$100 <u>160</u> ,000	\$100 <u>35</u> ,000
EM&V	<u>\$0</u>	\$25 <u>20</u> ,000	\$75 <u>50</u> ,000	<u>\$30,000</u>
Total <u>Per Year</u>	\$125,000 <u>107,500</u>	<u>\$410,500</u>	\$450 <u>397</u> ,000	<u>\$425</u> <u>85</u> ,000
Total for three <u>four</u> years- of pilot-				\$1,000,000

¹⁷ The budget has been revised to reflect actual expenditures in 2019 where efforts were focused on marketing and outreach planning, the extension of the pilot period and additional events and data collection proposed in the updated plan. The changes in the budget also include a new budget category for Participation and Outreach to more accurately reflect the expenditures associated with this updated plan resulting from Covid-19. This category includes direct participation payments, incentives for surveys, participant referrals, local customer support and education and outreach. Since program operations are expected to last through 2021, all final incentives may not be paid out until early 2022. This possibility as well as final administration and EM&V efforts are reflected in 2022.

Proposed Roles and Responsibilities for Pilot

PG&E

Pilot Administrator

Pilot Design Review & Approval

Pilot Material Review & Approval

Participant Eligibility Review & Approval

Pilot Assessment Review & Approval



Olivine

Development of Pilot Material

Participant Recruitment and Enrollment

Pre and Post Survey Administration

Event Notification

Customer Care

Nomination Management

Award and Dispatch

Settlements & Reporting

Attachment 2

Disadvantaged Communities Demand Response Pilot Proposal Revised June 24, 2020 (Clean)

Disadvantaged Communities Demand Response Pilot Proposal

Pacific Gas and Electric Company & Olivine

June 24, 2020

Background

D. 18-11-029 or the Decision (issued December 10, 2018) ordered the IOUs to each submit a Tier 2 Advice letter within 60-days after the issuance of this Decision (by February 8, 2019) proposing a demand response (DR) pilot focused on providing direct economic benefits to disadvantaged communities (DACs). Total funding for the DAC DR Pilots over the period 2019-2022 is \$2.5 million across the three IOUs with PG&E allocated \$1.0 million with 10% of the budget dedicated to EM&V.¹

The Decision defines DACs as census tracts that score above 75th percentile using the CalEnviroScreen tool plus an additional 22 census tracts that score in the highest five percent of CalEnviroScreen's pollution burden, but do not have an overall CalEnviroScreen score because of unreliable socioeconomic or health data.²

The Decision provides for the use of zip codes or census tracts in targeting for the purposes of this pilot and provides support for marketing and outreach efforts to increase enrollment and participation in DACs, while learning more about the target population and the residents' ability to respond to DR events.

This Pilot Proposal outlines how PG&E and its partner, Olivine, plan to implement the DAC Pilot in the 2018-2022 DR Program cycle. The program was implemented according to the original plan prior to the onset of the coronavirus pandemic. As a result of the pandemic and the subsequent shelter in place orders, PG&E and Olivine have revisited the program plan, with an overall focus on meeting the program's original enrollment target (2,500)³ through new

¹ Decision 17-12-003, Ordering Paragraph 58.

² D.18-11-029, p. 62. Link: <https://oehha.ca.gov/media/downloads/calenviroscreen/fact-sheet/ces30factsheetfinal.pdf>

³ The program team would like to reserve the right to adjust the original enrollment targets in Q3, 2020 pending our ability to be able to organize the in-person enrollment events in Fresno as planned and aligned with the in-person communication needs of reaching a hard to reach population base. If the shelter-in-place continues to impact program implementation a realistic enrollment target would be 500 customers.

channels of digital marketing and remote enrollment assistance campaigns. This revised plan strengthens our ability to provide economic assistance through program incentives to Fresno DAC residents negatively impacted by the pandemic.

This revision to the pilot proposal is a result of changes to the program marketing, implementation and operations required due to the Covid-19 shelter in place order put in place for California (March 19th for Bay Area and March 23rd for the State of California). The Covid-19 shelter in place orders in California have impacted the program team's ability to work with local community-based organizations who planned to conduct outreach and marketing needed for program enrollment. Since the target population includes a high proportion of low income and hard to reach customers, a local on-site engagement approach, originally planned for the program, was a key strategy to reach the target enrollment numbers. Given the shelter-in-place order and concerns about the health and welfare of those involved, this plan has been revised to adapt to the current Covid-19 situation.

Pilot Target Location

Using the methodology Olivine developed that was adopted under D. 18-11-029, this pilot would target census tracts in zip codes that qualify as DACs within a 10-mile radius of the Malaga natural gas fired peaking plant.⁴ The pilot will include customers residing in zip codes: 93701, 93702, 93703, 93721, 93725, 93706 and 93728, which fully encompasses south-central Fresno community selected for the Community Air Protection Program under Assembly Bill (AB) 617.⁵ Geographically, this community is bounded by Golden State Boulevard to the west, McKinley Avenue to the north, Chestnut Avenue to the east, and includes the small community of Malaga at the southern tip of the boundary.

These DACs have some of the highest environmental justice (EJ) percentile rankings in the State. The average overall CalEnviroScreen Score and Population

⁴ The Malaga Power Plant is a 96 MW gas fired peaking plant located in south Fresno.

⁵ AB 617 called for the California Air Resources Board (CARB) to establish the Community Air Protection Program (CAPP). This Program's focus is to reduce exposure in communities most impacted by air pollution. If the CAPP program expands the geographic footprint of South-Central Fresno prior to the commencement of the DAC DR Pilot, then PG&E requests flexibility to adjust zip codes accordingly. Moreover, the pilot may identify other zip codes for assessment as part of a control group to support the EM&V process.

Characteristics for the area values are both above the 97th percentile. Of the approximately 25,000 residential households within this target area, approximately 75% are California Alternative Rates for Energy (CARE)⁶ eligible.

Pilot Strategy

During hot summer afternoons the Malaga powerplant can be dispatched to meet high energy demand in the greater Fresno area.⁷ Distribution lines serving South Central Fresno can also experience high loading conditions during these same periods.

This Pilot intends to target residential customers within a 10-mile radius of the Malaga power generation plant. Using a statistically relevant sample size near a gas fired peaking plant will provide insights for future program designs that are applicable and scalable for use in similarly situated households throughout the Central Valley area (approximately 500,000 households).

The Pilot will collect demographic, psychographic, and energy usage data in order to evaluate the willingness and ability of residents within this community to participate in DR either by reducing or shifting load in response to both grid and environmental signals. At scale and over time, these types of DR actions could materially reduce the need for dispatch and cycling of peaking plants and reduce high loading on distribution lines.

Marketing and outreach efforts to increase understanding and engagement in DR programs will be tested to better understand how to access diverse and hard to reach populations within the targeted community, how to overcome challenges and barriers to participation, and ways to provide additional value to both participating and non-participating residents by leveraging other demand side management program options available.

The following areas will be explored during the study period.

- **Awareness and Willingness to Participate:** What is the current level of awareness of DR program availability and understanding of how DR programs create value for customers and the community? What is the

⁶ CARE provides for discounted rates based on income eligibility. Link: <https://www.pge.com/care/>

⁷ All communities in the Pilot area fall into the Fresno sub-Load-Aggregation-Point (subLAP) as currently defined by the CAISO.

current level of interest in participating in demand response programs? If possible, compare responses of DAC households to non-DAC households.

- **Energy Use and Ability to Participate:** How do the different DAC households use energy in their homes? How well can DAC households respond to and participate in DR programs? If the population is large enough, we intend to compare usage and responses by households in and outside of DACs.
- **Outreach:** What are the best methods to reach different types of households in DACs, including those that are hard to reach?
- **Messaging:** What kind of messaging resonate best with households?
- **Benefits:** What kinds of DR incentives and program offerings will be of greatest value to DAC households and benefit them the most?

Theory of Pilot Intervention

The Pilot leverages and expands on Olivine's recently completed Community Energy Initiative (CEI) based in Richmond, CA. The CEI was a limited study (50 participants) that provided incentives for survey participation:

- How and when do individuals use energy in their homes?
- Can a household reduce energy when requested?
- Will households participate in DR programs?
- Are there observed differences between households in DACs and those not in DACs but proximate to DACs?
- What are important concerns of households for their communities?
- Do carbon emissions fit into those concerns and to what extent?
- What methods and approaches for outreach are most successful?
- How much facility do households have with technology?

Mobile application tools were developed to provide awareness for energy usage and messaging capabilities for load reduction through behavioral demand response.

Outreach and Enrollment: The Pilot intends to leverage and expand the study in Richmond within the targeted zip codes in Fresno. As was the case in Richmond social media and community organizations will be used for outreach, to the extent consistent with the governor's Covid-19 directives. In Fresno, partnerships

will be formed with local community-based organizations to reach the diverse populations. Marketing and educational materials will be developed in the population's predominant native language (e.g. Spanish) beginning in the last quarter of 2019. In addition to social media and community organizations, PG&E and Olivine will attempt to engage one or more Energy Savings Assistance program contractors as well as one or more San Joaquin Valley Pilot Community Energy Navigator located in the south-central Fresno area.⁸ Training on the Pilot program design and use of the Olivine on-line application will be rolled out in the first quarter of 2020 to support community awareness, outreach and initial enrollment efforts.

Participants will be provided access to an existing easy-to-use mobile app and website, as was used in Olivine's CEI in Richmond, to support customer engagement and education throughout the pilot and to facilitate communications, collection of surveys and other direct participant information. In order to provide for as many customers as possible there will be both behavioral as well as automated technology enabled options offered and enrollment processes will include online capabilities to provide for near real-time validation of customer eligibility.

The initial enrollment phase has been extended from June 2020 until September 2020 with consideration for enabling additional enrollments after that time period.⁹ Initial surveys and assessment will be included in this enrollment phase. A critical enrollment strategy is the use of local partnerships for marketing and outreach, in a manner consistent with Covid-19 related limitations. While initially in person program training and enrollment events were a cornerstone of this strategy the team has revised the approach to eliminate gatherings and limit direct contact.

This revised approach includes:

- Developing new bilingual digital marketing collateral (videos, testimonials, radio, television, webinars, etc.).
- Launching new partnerships with organizations who are able to co-market

⁸ These entities provide services and are both well-known and trusted in the community. Therefore, their participation would be useful in the recruitment effort.

⁹ Enrollment period flexibility supports maximizing the number of participants and addressing potential attrition.

more effectively without in-person contact and to reach the population most in need (e.g. via food banks, charity organizations).

- Hiring local outreach ambassadors from the targeted population to do marketing following social distancing guidelines.

Demand Response Testing: During the Pilot there will be a study period for both home energy summer peak shaving and winter/spring load shifting¹⁰ to analyze the capabilities of the population to provide both load reduction as well as shift consumption into periods of excess renewable supply.

The summer season is planned to be the peak shaving event study season. Late afternoon and early evening hours will be used for DR events targeting high value times when the Malaga power station may be dispatched and/or PG&E substations may have high loading. The effectiveness of varying triggers such as grid need, pricing, and air quality will be tested. Market price signals as well as forecasts of potential dispatch of the Malaga power-plant will be used.

Similarly, during the winter months, energy excess supply will be studied focusing on the capabilities of the participants to shift load usage to match available renewable energy supply.¹¹

Up to ten (10) DR events will be targeted for each study season and incentives will be paid for both specific events as well as consistent performance and participation in surveys. The Pilot will include the measurement and evaluation activities to determine the value of the capabilities to the targeted pilot location as well as broader generalizations at scale, responses to differing triggers and impacts from the measured performance.

Due to Covid-19 shelter in place order, the program team does not expect to meet the enrollment targets for summer 2020 and plans to utilize the summer of 2021 as the main summer peak shaving DR event study season with up to ten (10)

¹⁰ In the context of the Pilot, a load shift event may consist of the customer being informed that clean energy is abundant during certain periods. The customer will have discretion over how to respond to this information. For example, providing information that shifting use of electric clothes drying from a rainy Friday evening to a sunny Saturday morning on certain days during the winter and spring will result in significantly lower GHGs and other air emissions related to that use of energy.

¹¹ Due to higher levels of renewables especially solar generation, California can experience times of over- supply of generation especially during non-summer months. This is sometimes referred to as the “belly of duck curve.”

Link: <https://www.nrel.gov/docs/fy16osti/65023.pdf>

DR events during that period as planned. Furthermore, up to five (5) DR events are planned for the summer of 2020 to keep the early adopters of the program engaged and motivated during this period. This shift in approach will require a modification in the program's overall schedule and an expanded DR event season for a total of 30 events as opposed to the previously plan of 20 events. Therefore, the program will need to pay incentives to customers for the additional events over a longer period of time.

Market Integration

The Pilot operations will leverage the existing capabilities and infrastructure already deployed by Olivine in other PG&E pilot programs, including the Supply Side II (SSP II) and Excess Supply (XSP) DR Pilot.¹² One or both of these existing pilots will serve as the mechanism for integration of the DAC DR Pilot into the CAISO wholesale market if feasible.¹³

Amount and Form of Economic Benefits

The Pilot intends to provide a significant portion of the budget monies directly to Fresno DAC residents within the Community.¹⁴ Participants will receive direct incentives for providing responses to surveys and for participating in DR events. Active participants are expected to earn approximately \$200 - \$270 in direct incentives through some combination of initial Pilot survey completion, participation in Pilot peak shaving and load shifting events, completion of the final Pilot survey and enrollment referrals.¹⁵

Through energy monitoring, awareness and education, participants may have the opportunity to save energy and reduce their energy bills. The Pilot will coordinate with other PG&E programs to efficiently reach the largest number of customers and provide needed services. Eligible participants may also receive free technology installation and support to reduce their energy usage and to

¹² Olivine's webpage provides an overview of the Supply Side II Pilot and Excess Supply Pilot

Link (SSP-II): <https://olivineinc.com/services/our-work/ssp/>

Link (XSP): <https://olivineinc.com/services/our-work/xsp/>

¹³ The program's original enrollment targets of 2,500 customers was based on the estimate of the number of participants needed for an aggregation sufficiently large for participation in the wholesale market as a CAISO resource.

¹⁴ The Pilot's Participation and Outreach Budget category includes direct incentives, payments for referrals, local support and related fees within the Community.

¹⁵ Illustrative Example: \$30 for Home Energy Survey + \$190 for Energy Savings Events + \$30 Customer Experience Survey + \$20 for Enrollment Referral = \$270

leverage other available Demand Side program options and incentives.

Pilot Analysis and Assessment Including Cost-Effectiveness

As these DAC DR Pilots are first of their kind, PG&E and Olivine will work with stakeholders and Energy Division Staff to develop a plan for quantitative and qualitative evaluation of the Pilot. The evaluation will include an assessment of program design and delivery, customer experience, load impacts, environmental impacts, and cost-effectiveness. PG&E and Olivine will develop key performance indicators and will report out annually and at the end of the pilot in a fashion similar to the current SSP-II and XSP Pilots. These key performance indicators will be reflective of customer benefits including safety, reliability affordability, awareness and access. Additionally, consistent with guidance provided in D. 18-11-029, key performance indicators will be developed and reported reflecting potential air quality improvements related to the pilot.

Consumer Protection

No customer will be charged any fee for participating in the Pilot nor will there be any penalty for exiting the Pilot once enrolled. For low income customers participating in the Pilot no out-of-pocket payment will be required for demand response automation equipment. Furthermore, Pilot test events will be structured in a way that will attempt to either reduce energy consumption (peak shaving) or reduce energy costs (load shifting) or both.

Coordination with Other IOUs

PG&E's lead on the DAC DR Pilot did reach out to both SCE and SDG&E leads to discuss opportunities for collaboration and to ensure that PG&E was not duplicating the learnings that either SCE or SDG&E were planning from their DAC DR Pilot design.

Disadvantaged Community Advisory Group (DACAG)

On January 25, 2019 the DAC Pilot proposal was presented to the DACAG at its meeting in Fresno. Feedback from the DACAG was incorporated into this proposal. During that meeting plans for coordination were discussed to update the DACAG periodically during the pilot lifecycle and the DACAG will consider forming a subgroup to coordinate more frequently with the DAC DR pilot.¹⁶

Justification for Choice of Third-Party

PG&E has chosen to partner with Olivine for this Pilot based on Olivine's wealth of knowledge related to demand response program and platform design including all aspect of CAISO market integration. In addition, Olivine previously completed the Richmond Community Energy Initiative which allows this Pilot to extend Olivine's learnings from that work as well as leverage the mobile application that Olivine built for that earlier study. Finally, the partnership between PG&E and Olivine allows this Pilot to potentially utilize existing platforms that Olivine currently uses for PG&E's existing SSP II and XSP Pilots.

Customer Data Sharing

Customer data for this pilot would fall under Rule 27 addressing primary purpose use. PG&E's existing Master Service Agreement with Olivine includes provisions on confidentiality and data security regarding the handling of confidential information and PG&E Data from PG&E or its customers. This is consistent with the process established for the two existing pilots (SSP II and XSP) for which Olivine serves as the primary contractor and PG&E as the pilot administrator.

Additional Supporting Information

The remaining pages provide addition information, including the proposed schedule for the pilot, a proposed illustrative budget and the proposed roles and responsibilities between PG&E and Olivine.

¹⁶ The Pilot team is awaiting confirmation of date for the next update, subsequent to COVID. A subgroup has not been formed.

Proposed Schedule for Pilot

The changes to the overall pilot schedule due to Covid-19 impacts include the following:

- Expansion of the program initial outreach and engagement period by one quarter, enabling ongoing enrollments.
- Expansion of the DR event season by two quarters in order to collect data for a peak shaving summer season with a good sample size:
 - Original DR event season Q3 2020 – Q1 2021 (3 quarters, 20 events total)
 - New proposed DR event season Q3 2020 – Q3 2021 (5 quarters, 30 events total)
- Expansion of the overall program implementation period by two quarters.

<u>Q1 2019</u> – Submit Tier II Advice Letter	<u>Q2 2019</u> – Tier II Advice Letter Approved	<u>Q3 2019</u> – Finalize scope of work and contract provisions with Olivine.	<u>Q4 2019</u> – Identify Fresno area community organizations and plan social media outreach.
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Total Per Year	\$107,500	\$410,500	\$397,000	\$85,000
Total for four years of pilot				\$1,000,000

¹⁷ The budget has been revised to reflect actual expenditures in 2019 where efforts were focused on marketing and outreach planning, the extension of the pilot period and additional events and data collection proposed in the updated plan. The changes in the budget also include a new budget category for Participation and Outreach to more accurately reflect the expenditures associated with this updated plan resulting from Covid-19. This category includes direct participation payments, incentives for surveys, participant referrals, local customer support and education and outreach. Since program operations are expected to last through 2021, all final incentives may not be paid out until early 2022. This possibility as well as final administration and EM&V efforts are reflected in 2022.

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