

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



Pacific Gas & Electric Company
ELC (Corp ID 39)
Status of Advice Letter 6123E
As of April 27, 2021

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

Division Assigned: Energy

Date Filed: 03-19-2021

Date to Calendar: 03-24-2021

Authorizing Documents: D1712023

Disposition:	Accepted
Effective Date:	04-18-2021

Resolution Required: No

Resolution Number: None

Commission Meeting Date: None

CPUC Contact Information:

edtariffunit@cpuc.ca.gov

AL Certificate Contact Information:

Stuart Rubio

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- Disposition of Filing (Accepted, Rejected, Withdrawn, etc.)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

March 19, 2021

Advice 6123-E

(Pacific Gas and Electric Company U 39 E)

Public Utilities Commission of the State of California

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

Purpose

Pursuant to Ordering Paragraph 9 and Appendix A of California Public Utilities Commission (CPUC or Commission) Decision (D.)17-12-023, Pacific Gas and Electric Company (PG&E) hereby submits this Tier 2 advice letter for compliance approval of a revised evaluator contract resulting from the evaluator Ipsos' proposal to increase the scope of work to include incremental evaluation activities, extend the evaluation timeline, and increase costs due to incremental activities. PG&E requests that the Commission approve the revised contract as compliant with the requirements of Decision (D.) 17-12-023.

Background

In D.17-12-023, PG&E, Southern California Edison (SCE), and San Diego Gas and Electric Company (SDG&E), collectively the investor-owned utilities (IOUs), were directed to conduct, in consultation with the Commission's Energy Division and the ME&O Working Group, a competitive request for proposal (RFP) solicitation process to select a consultant to perform Evaluation Work for Statewide Residential Rate Reform ME&O¹. The Evaluator (Evaluator) is to provide interim and final evaluations of strategy effectiveness of the residential rate reform statewide ME&O program based on metrics defined by Energy Upgrade California administrative staff and the ME&O Working Group which includes the Commission's Energy Division and other stakeholders.²

By agreement of the IOUs, PG&E established and coordinated an RFP process, per Ordering Paragraph 9. Ipsos was selected as the Evaluator for Statewide Residential

¹ D.17-12-023, OP 9, p. 63.

² D.17-12-023, Phase II-B: Evaluation Work, Appendix A, p. 5, and Appendix B.

Rate Reform ME&O based on the highest score from the scoring committee with a contract signed on July 24, 2018.

A contract work authorization in the amount of \$1,123,000 was executed by PG&E³, managed in conjunction with the CPUC and Energy Upgrade California administrative staff. PG&E filed Advice Letter 5540-E⁴ on May 3, 2019, requesting approval of the Consultant Contract, and on July 12, 2019, the Energy Division approved Advice Letter 5540-E. Funding is being allocated from the Statewide Residential Rate Reform ME&O budget as follows: 45% for PG&E, 43% for SCE, and 12% for SDG&E⁵

In August 2020, the Evaluator (Ipsos) proposed a new measurement plan⁶ as a result of changes to PG&E's and SCE's respective rollouts of customer transition to Time-of-Use rates, whereby both PG&E and SCE will now complete the transition of their last default-eligible customers in March 2022⁷. On August 12th 2020 Ipsos shared the measurement plan with the Energy Division, IOUs, DDB and OMD, and general agreement was reached to proceed with the plan. The final measurement plan was shared with the TOU Working Group on August 25th. Ipsos' plan consists of a scope of work, timeline and costs for the Evaluation, which changes the original contract as follows:

- a) Scope of work changes: There are 3 changes to the original contract's scope of work. The main change proposed is the addition of a fifth and final Evaluation survey wave, to occur in Q2 2022, with the objective of evaluating KPIs at the end of default across all IOU territories. In addition, a sample boost is proposed for SCE during wave 3 to measure the impact of the Precision campaign in its territory after SCE's initial customer transition at the end of 2020. Finally, an "Extra Wave" is recommended for PG&E in February 2021 in order to provide feedback on EUC's Engagement campaign, as well as PG&E's Rate Options campaign.
- b) Timeline extension: It is proposed that the Evaluator contract term is extended from 12/31/2021 to 12/31/2022 in order to accommodate the final Evaluation wave (wave 5) in 2022.
- c) Additional costs: The scope of work changes proposed in a) amount to an additional \$310,000, which when added to the original contract of \$1,123,000, sums to a total of \$1,433,000.

³ The initial contract work authorization was signed on July 24, 2018 with a supplemental contract work authorization signed on October 18, 2018 to adjust the amount authorized.

⁴ AL 5540-E, Request for Approval of PG&E's Residential Rate Reform Evaluator Contract in Compliance with Decision 17-12-023, May 3, 2019.

⁵ D.17-12-023 Decision Addressing Statewide Marketing, Education, and Outreach for Residential Rate Reform. OP 8, p. 62. December 14, 2017.

⁶ Statewide Evaluation 2020-2022 Measurement Plan, Ipsos, August 2020

⁷ PG&E Quarterly Progress of Residential Rate Reform (PRRR) Report. November 2, 2020, p.23

Since the statewide research Wave 4 in Q3 2021 would be conducted from the additional funds requested above, time is of the essence with regard to the approval of this Advice Letter.

The initial Contract Work Authorization including the Statement of Work (SOW) signed on July 24, 2018 is included in Attachment A. The Change Order SOW as agreed to by the ME&O Working Group signed on October 18, 2018 is included in Attachment B. The Statewide Evaluation 2020-2022 Measurement Plan of August 2020 is included in Attachment C.

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

Confidentiality

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

Protests

Anyone wishing to protest this submittal may do so by letter sent via U.S. mail, facsimile or E-mail, no later than **April 8, 2021**, which is 20 days after the date of this filing. Protests must be submitted to:

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

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

Copies of protests also should be mailed to the attention of the Director, Energy Division, Room 4004, at the address shown above.

The protest shall also be sent to PG&E either via E-mail or U.S. mail (and by facsimile, if possible) at the address shown below on the same date it is mailed or delivered to the Commission:

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

Facsimile: (415) 973-3582
E-mail: PGETariffs@pge.com

Any person (including individuals, groups, or organizations) may protest or respond to an advice letter (General Order 96-B, Section 7.4). The protest shall contain the following information: specification of the advice letter protested; grounds for the protest; supporting factual information or legal argument; name, telephone number, postal address, and (where appropriate) e-mail address of the protestant; and statement that the protest was sent to the utility no later than the day on which the protest was submitted to the reviewing Industry Division (General Order 96-B, Section 3.11).

Effective Date

Pursuant to General Order (GO) 96-B, Energy Industry Rule 5.2, this advice letter is submitted with a Tier 2 designation. This advice letter will become effective upon regular notice, **April 18, 2021**, 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 R.12-06-013. Address changes to the General Order 96-B service list should be directed to PG&E at email address PGETariffs@pge.com. 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:ProcessOffice@cpuc.ca.gov). Send all electronic approvals to PGETariffs@pge.com. Advice letter filings can also be accessed electronically at: <http://www.pge.com/tariffs/>.

_____/S/
Erik Jacobson
Director, Regulatory Relations

Attachments

cc: Service List R.12-06-013



ADVICE LETTER SUMMARY



ENERGY UTILITY

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

Company name/CPUC Utility No.: Pacific Gas and Electric Company (U 39 E)

Utility type:

- ELC GAS WATER
 PLC HEAT

Contact Person: Stuart Rubio

Phone #: (415) 973-4587

E-mail: PGETariffs@pge.com

E-mail Disposition Notice to: SHR8@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) #: 6123-E

Tier Designation: 2

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

Keywords (choose from CPUC listing): Compliance, Agreements

AL Type: Monthly Quarterly Annual One-Time Other:

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

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL: No

Summarize differences between the AL and the prior withdrawn or rejected AL: N/A

Confidential treatment requested? Yes No

If yes, specification of confidential information: See Confidential Declaration and Matrix
 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: Kristi Wilkins, K1WJ@pge.com & Jenna Olsen, JMOL@pge.com.

Resolution required? Yes No

Requested effective date: 4/18/21

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:

BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA

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

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

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

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

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

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

3. Title and description of document(s):

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

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

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

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

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

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

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

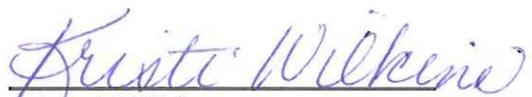
Corporate financial records

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

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

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

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



Kristi Wilkins
Senior Director, Marketing and Advertising
Pacific Gas and Electric Company

PACIFIC GAS AND ELECTRIC COMPANY (U 39 E)

**Residential Rates Order Instituted Rulemaking R.12-06-013
ATTACHMENT TO DECLARATION
May 2, 2019**

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

**BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA**

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

1. I, Jenna Olsen, am the Director of Pricing Products at Pacific Gas and Electric Company (“PG&E”), a California corporation. Laurie Giammona, the Senior Vice President and Chief Customer Officer of PG&E, delegated authority to me to sign this declaration. My business office is located at:

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

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

Name or Docket No. of CPUC Proceeding (if applicable): Residential Rates
Order Instituting Rulemaking R.12-06-013

3. Title and description of document(s): Attachment C, Statewide Evaluation 2020-2022
Measurement Plan, by Ipsos. Document sets out updated measurement plan for the statewide
campaign, extending measurement into 2022, adding to the scope of work and costs.

4. These documents contain confidential information that, based on my information and belief, has not been publicly disclosed. These documents have been marked as confidential, and the basis for confidential treatment and where the confidential information is located on the documents are identified on the following chart [INCLUDE IF ADDITIONAL DETAILS

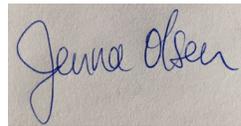
NECESSARY TO IDENTIFY LOCATION OF CONFIDENTIAL INFORMATION,

with further detail provided in Appendix A, which is incorporated into this declaration]:

Check	Basis for Confidential Treatment	Where Confidential Information is Located on the Documents
<input type="checkbox"/>	<p>Customer-specific data, which may include demand, loads, names, addresses, and billing data.</p> <p>(Protected under PUC § 8380; Civ. Code §§ 1798 <i>et seq.</i>; Govt. Code § 6254; Public Util. Code § 8380; Decisions (D.) 14-05-016, 04-08-055, 06-12-029)</p>	
<input type="checkbox"/>	<p>Personal information that identifies or describes an individual (including employees), which may include home address or phone number; SSN, driver’s license, or passport numbers; education; financial matters; medical or employment history (not including PG&E job titles); and statements attributed to the individual.</p> <p>(Protected under Civ. Code §§ 1798 <i>et seq.</i>; Govt. Code § 6254; 42 U.S.C. § 1320d-6; and General Order (G.O.) 77-M)</p>	
<input type="checkbox"/>	<p>Physical facility, cyber-security sensitive, or critical infrastructure data, including without limitation critical energy infrastructure information (CEII) as defined by the regulations of the Federal Energy Regulatory Commission at 18 C.F.R. § 388.113 and/or General Order 66-D (“The subject information: (1) is not customarily in the public domain by providing a declaration in compliance with Section 3.2(c) stating that the subject information is not related to the location of a physical structure that is visible with the naked eye or is available publicly online or in print; and (2) the subject information either: could allow a bad actor to attack, compromise or incapacitate physically or electronically a facility providing critical utility service; or discusses vulnerabilities of a facility providing critical utility service”).</p> <p>(Protected under Govt. Code § 6254(k), (ab); 6 U.S.C. § 131; 6 CFR § 29.2)</p>	
X	<p>Proprietary and trade secret information or other intellectual property and protected market sensitive/competitive data.</p> <p>(Protected under Civ. Code §§3426 <i>et seq.</i>; Govt. Code §§ 6254, <i>et seq.</i>, e.g., 6254(e), 6254(k), 6254.15; Govt. Code § 6276.44; Evid. Code §1060; D.11-01-036)</p>	<p>Page 4 - describing market-sensitive and proprietary contract</p>

	cost and pricing information
<input type="checkbox"/> Corporate financial records. (Protected under Govt. Code §§ 6254(k), 6254.15)	
<input type="checkbox"/> Third-Party information subject to non-disclosure or confidentiality agreements or obligations. (Protected under Govt. Code § 6254(k); see, e.g., CPUC D.11-01-036)	
<input type="checkbox"/> Other categories where disclosure would be against the public interest (Govt. Code § 6255(a)) [NEED TO EXPLAIN HOW THE PUBLIC INTEREST SERVED BY NOT DISCLOSING THE RECORD CLEARLY OUTWEIGHS THE PUBLIC INTEREST SERVED BY DISCLOSURE]: _____	

5. The importance of maintaining the confidentiality of this information outweighs any public interest in disclosure of this information. This information should be exempt from the public disclosure requirements under the Public Records Act and should be withheld from disclosure.
6. I declare under penalty of perjury that the foregoing is true, correct, and complete to the best of my knowledge.
7. Executed on this 19th day of March, 2021 at San Francisco, California.



Jenna Olsen
[Name]

Director of Pricing Products
[Title]

Pacific Gas and Electric Company

ATTACHMENT NAME	DOCUMENT NAME	CATEGORY OF CONFIDENTIALITY	LOCATION

Advice 6123-E
March 19, 2021

Pacific Gas and Electric Company

Attachment A

(Redacted)



Contract Work Authorization (CWA)

This Contract Work Authorization ("CWA") No. C9526 is issued under and pursuant to the Blanket Agreement or Master Service Agreement No. C1172 (formerly No. 440004442) dated 4/20/2010 (the "MSA") between the below-named Contractor ("Contractor"), a Michigan Corporation, and Pacific Gas and Electric Company ("PG&E"), a California corporation with its headquarters located at 77 Beale Street, San Francisco, California 94105. Contractor shall perform all Work under this CWA pursuant to and in accordance with the terms and conditions of the MSA.

Contractor's Legal Name:	Research Data Analysis, Inc.	Total Number of Pages: 16
Contractor's Address:	450 Enterprise Ct. Bloomfield Hills, MI 48302	
Project Name:	Evaluator for Statewide Rate Reform Marketing, Education & Outreach	
Job Location:	Various within the PG&E Service Territory	

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

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

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

- Attachment 1: Statement of Work, 8 pages
- Attachment 2: Pricing Worksheet, 1 page
- Attachment A: Transition Schedule, 5 pages

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

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

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

TOTAL: \$1,100,000.00

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

PACIFIC GAS AND ELECTRIC COMPANY		CONTRACTOR: Research Data Analysis, Inc.	
Signature	 91084E946B4D4BF...	Signature	 BEDC9A276C41424...
Name	Eric Strehlow Richard Cordova	Name	Mark P. Campbell
Title	Sourcing Manager	Title	VP & Treasurer
Date	7/24/2018	Date	7/21/2018



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

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

Evaluator for Statewide Rate Reform Marketing, Education & Outreach

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

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

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

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

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

On December 23, 2017, the CPUC issued Decision 17-12-023 to address statewide marketing, education, and outreach for residential rate reform. The Decision expands the ongoing Energy Upgrade California (EUC) campaign¹ and adds to the role of DDB San Francisco (DDB), the statewide implementer of the EUC campaign, the task of implementing statewide residential rate reform ME&O to help “avoid duplicative efforts and expenditures, and...leverage the time and

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

resources that the Commission, DDB, the IOUs, and other stakeholders have already expended on EUC²". The scope of work for the statewide rate reform campaign is structured in two phases: Phase 1 (the responsibility of DDB): updating the ME&O Blueprint update, followed by marketing content development, testing, creative design, and Blueprint maintenance, and Phase 2 (the responsibility of consultants to be selected): a) media implementation and outreach, and b) separate evaluation of the statewide ME&O effort.

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

Phase 1 work has started and timelines for the deliverables have been described in the Decision⁴. However, the timing of the IOUs' actual default to TOU rates has not yet been determined; a decision on that matter is expected in May 2018. It is therefore critical for the evaluator of the statewide residential rate reform campaign to be flexible in its approach to this assignment.

2. PURPOSE

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

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

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

² D.17-12-023, P.25

³ D.17-12-023, OP9

⁴ D.17-12-023, Appendix A

⁵ Blueprint Slide 60

⁶ D.17-12-023, p.42 and OP4

⁷ D. 17-12-023, p.13

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

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

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

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

3. EVALUATOR TASKS & RESPONSIBILITIES

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

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

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

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

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

- Description of the proposed methodologies

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

¹⁰ D. 17-12-023 Conclusions of Law P. 60, #10

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

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

Below is current media transition schedule

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

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

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

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

Task 2. Sampling plan development for survey research

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

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

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

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

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

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

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

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

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

Task 3. Development of the Survey Instrument

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

Task 4. Survey Fielding

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

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

Task 5. Reporting

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

4. REQUIRED QUALIFICATIONS

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

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

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

5. COMPENSATION

Pricing is detailed in Attachment 2 Pricing Workbook.

6. CONTRACT TERM

Upon contraction execution till 12/31/2021

7. CONTACT INFORMATION

PG&E

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

Evaluator (IPSOS)

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

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

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

DO NOT EDIT.

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

	SDG&E (March 2019)	SCE (October 2020)	PGE (October 2020)
Number of residential customers being defaulted as part of MASS default	750,000	3.3 million	2.7 million
• Number of benefitters	15,000	300,000	135,000
• Number of neutral benefitters	390,000	n/a	n/a
• Neutrals	n/a	2,200,000	1,350,000
• Number of neutral non-benefitters	315,000	n/a	n/a
• Non-benefitters	30,000	700,000	1,215,000
Customers to be excluded from default	374,000	800,000	2 million
Customers already on a TOU plan	147,000	421,554	299,000

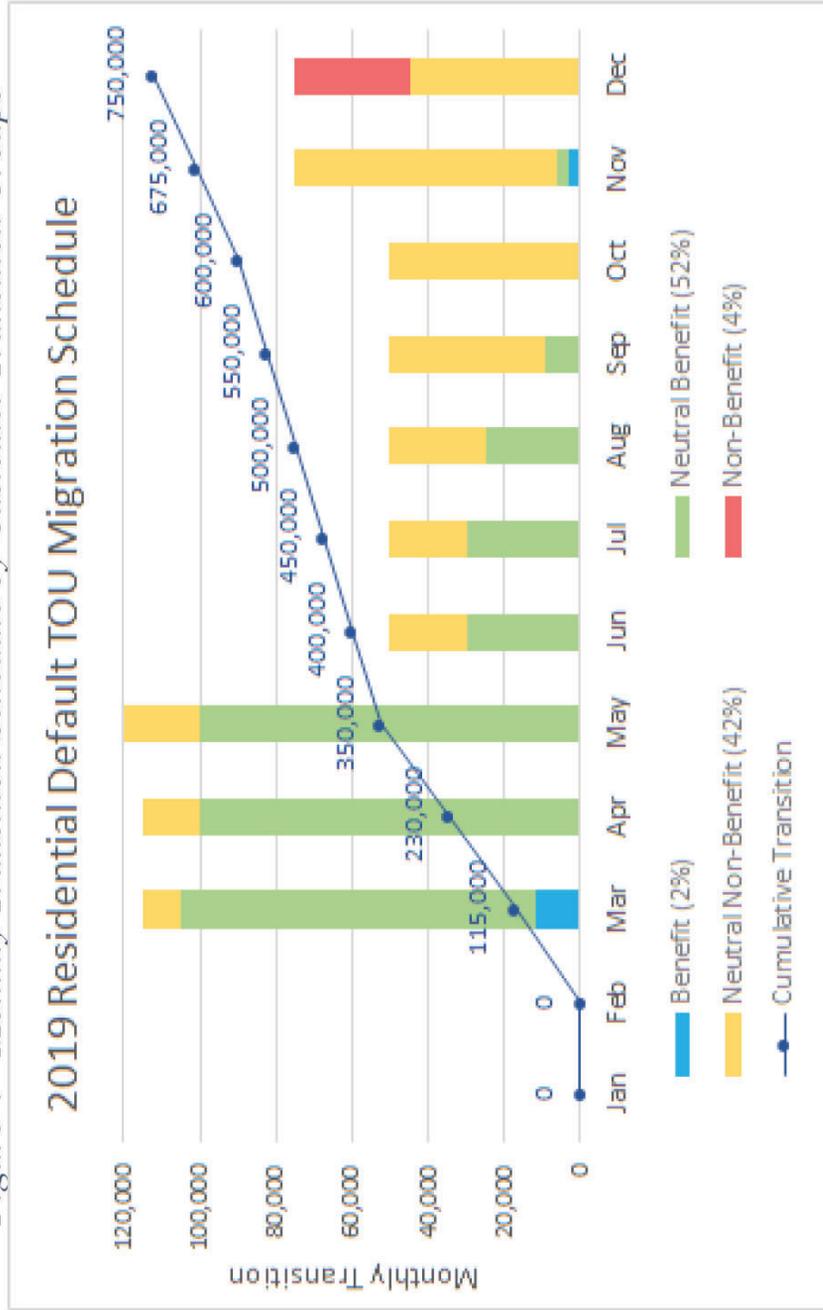
AppA-12

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

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

SDG&E Transition Schedule

Figure 4 - Monthly Transition Schedule by Customer Transition Groups



PG&E Transition Months

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

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

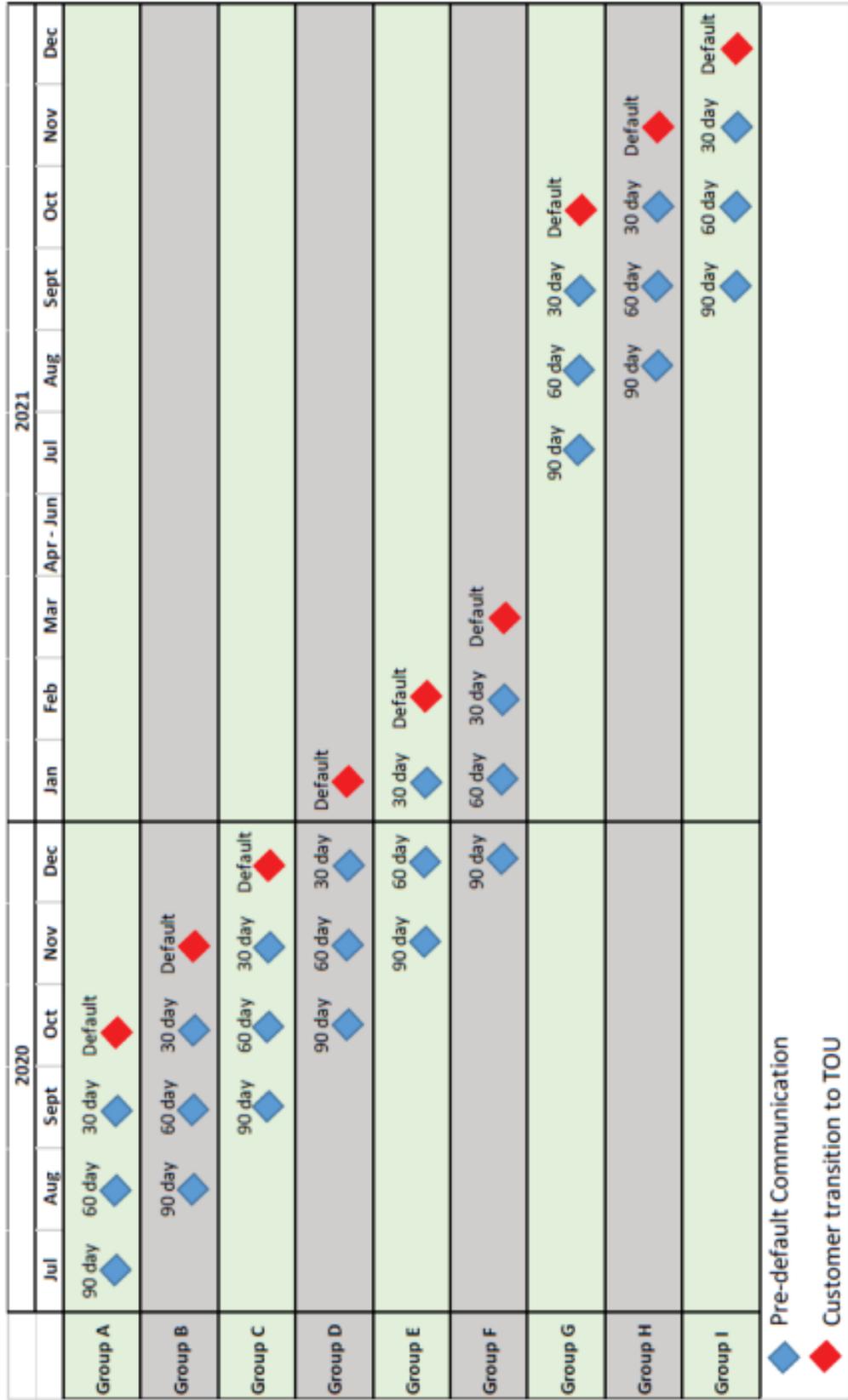
PG&E Transition Months

Option 2 – Preferred

Importing Estimated Customer Counts to Waves									
Proposed Sequence	Wave	Baseline Territory	CCA	PG&E Customers	CCA Customers	Total	Multiple	Multiple	Multiple
Oct	1	P, S, V	Yolo, Placer, Redwood (P, S, V)	237,856	119,588	357,444	10,000	10,000	10,000
Nov	2	R, W		153,797		153,797	10,000	10,000	10,000
Feb	3	X	MCE, MCE Expansion (X, T, S)	91,007	386,429	477,436	10,000	10,000	10,000
Mar	4	Q, Y, Z	SJ, SVCE, Monterey (X, T, Q)	42,286	570,444	612,730	10,000	10,000	10,000
Apr	5	T	EBCE (X, T, S)	91,007	410,470	501,477	10,000	10,000	10,000
May	6		Sonoma, PCE (X, T, P)		359,616	359,616	10,000	10,000	10,000
Jun	7		SFCP (T)		262,258	262,258	10,000	10,000	10,000
TOTAL				615,953	2,108,805	2,724,758			
Rounding customer counts and pooling BLTs and geographic descriptions									
Potential Timing	Wave	Baseline Territories Included	Description	Estimate of PG&E Customers	Estimate of CCA Customers	Total			
Oct-20	1	P, S, V	central part of Central Valley, North Coast	240,000	120,000	360,000			
Nov-20	2	R, W	Far north and south part of Central Valley	150,000	-	150,000			
Feb-21	3	X, T, S	Coastal range, North San Francisco Bay	90,000	390,000	480,000			
Mar-21	4	Q, X, Y, T, Z	South San Francisco Bay, Central Coast	40,000	570,000	610,000			
Apr-21	5	S, X, T	Coastal and some Coast range	90,000	410,000	500,000			
May-21	6	P, X, T	North San Francisco Bay	-	360,000	360,000			
Jun-21	7	T	San Francisco Bay		260,000	260,000			
TOTAL				610,000	2,110,000	2,720,000			

SCE Transition Months

Figure III-3
IDTM Period Timeline For Group Transitions



Certificate Of Completion

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Certificate Pages: 5	Initials: 0
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Envelopeld Stamping: Enabled	Ernest Aquilio Jr.
Time Zone: (UTC-08:00) Pacific Time (US & Canada)	77 Beale Street
	San Francisco, CA 94105
	EJA9@pge.com
	IP Address: 216.109.111.226

Record Tracking

Status: Original	Holder: Ernest Aquilio Jr.	Location: DocuSign
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Mark P. Campbell
 mark.campbell@ipsos.com
 VP & Treasurer
 Ipsos-Insight LLC
 Security Level: Email, Account Authentication (None)

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Signature

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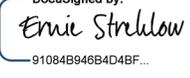
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Ernie Strehlow
 E4SB@pge.com
 Gas Portfolio Manager/Services
 Security Level: Email, Account Authentication (None)

Electronic Record and Signature Disclosure:
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In Person Signer Events	Signature	Timestamp
Editor Delivery Events	Status	Timestamp
Agent Delivery Events	Status	Timestamp
Intermediary Delivery Events	Status	Timestamp
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Carbon Copy Events	Status	Timestamp
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Payment Events

Status

Timestamps

Electronic Record and Signature Disclosure

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How to contact PG&E:

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

To contact us by email send messages to: pcpc@pge.com

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

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

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

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

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

Required hardware and software

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

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

Acknowledging your access and consent to receive materials electronically

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

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

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

Advice 6123-E
March 19, 2021

Pacific Gas and Electric Company

Attachment B

(Redacted)



Contract Work Authorization (CWA) Change Order

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

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

This Change Order consists of 3 pages.

Contractor's Address: 450 Enterprise Ct.

Bloomfield Hills, MI 48302

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

Job Location: Various within the PG&E Service Territory

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

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

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

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

Attachment No. 1, Page 3

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

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

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

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



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

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

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

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

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

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

Task 8
 - c. Due to the discrepancies, cost per telephone interview is significantly higher than budget. Ipsos team recommended, and EUC team including representatives from each IOU and CPUC agreed, to make the following changes to Wave 1 / 2018 fielding as a result:
 - i. Reduce total telephone surveys from n=2975 to n=1975.
 - ii. Increase total online surveys from n=2975 to n=3975 (thus maintaining combined online and telephone survey sample size).
 - iii. Shift distribution of telephone surveys from 50% cell phone / 50% land line to 60% cell phone / 40% land line.
- ii. Estimated cost of each task, and
 - a. Incremental cost of telephone surveys over original budget accounting for higher length, lower incidence, and reduced sample size is [REDACTED].
 - b. Incremental cost of online surveys over original budget accounting for lower length and increased sample size [REDACTED].
 - c. Incremental cost of shifting 10% of surveys from landline to cell phone is [REDACTED].
 - d. Total incremental costs: [REDACTED].
- iii. Expected date of completion of each task.
 - a. Project timeline is expected to be maintained.
 - b. We are striving to complete all telephone and online surveys by October 7.
- iv. Fees and Invoices
The total amount invoiced by Consultant, inclusive of all expenses and administrative costs, shall not exceed \$1,123,000.00.

Certificate Of Completion

Envelope Id: F1751521465F4B7A85E1E590724AC5C5	Status: Completed
Subject: CW2258725 - CWA C9526 CO1 RDA Evaluator for Statewide Rate Reform MEO.doc	
Source Envelope:	
Document Pages: 3	Signatures: 2
Certificate Pages: 2	Initials: 0
AutoNav: Enabled	Envelope Originator:
Envelopeld Stamping: Enabled	Trudy Jimenez
Time Zone: (UTC-08:00) Pacific Time (US & Canada)	77 Beale Street
	San Francisco, CA 94105
	A3J1@pge.com
	IP Address: 216.109.111.131

Record Tracking

Status: Original	Holder: Trudy Jimenez	Location: DocuSign
10/18/2018 2:24:03 PM	A3J1@pge.com	

Signer Events

Elena Andronova
 Richard.elias@ipsos.com
 General Counsel
 Ipsos-Insight, LLC
 Security Level: Email, Account Authentication (None)

Signature

DocuSigned by:

 DFAC51D5829E431...
 Signature Adoption: Pre-selected Style
 Using IP Address: 204.118.216.38

Timestamp

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 Viewed: 10/18/2018 3:16:53 PM
 Signed: 10/18/2018 3:17:53 PM

Electronic Record and Signature Disclosure:
 Not Offered via DocuSign

Larry Hernandez
 LHH8@pge.com
 Supervisor-Exempt, Sourcing
 PG&E
 Security Level: Email, Account Authentication (None)

DocuSigned by:

 A1577063FB7B41E...
 Signature Adoption: Pre-selected Style
 Using IP Address: 131.89.195.99

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 Signed: 10/18/2018 7:59:04 PM

Electronic Record and Signature Disclosure:
 Not Offered via DocuSign

In Person Signer Events	Signature	Timestamp
Editor Delivery Events	Status	Timestamp
Agent Delivery Events	Status	Timestamp
Intermediary Delivery Events	Status	Timestamp
Certified Delivery Events	Status	Timestamp
Carbon Copy Events	Status	Timestamp
Notary Events	Signature	Timestamp
Envelope Summary Events	Status	Timestamps
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Certified Delivered	Security Checked	10/18/2018 7:58:44 PM
Signing Complete	Security Checked	10/18/2018 7:59:04 PM
Completed	Security Checked	10/18/2018 7:59:04 PM

Payment Events

Status

Timestamps

Advice 6123-E
March 19, 2021

Pacific Gas and Electric Company

Attachment C

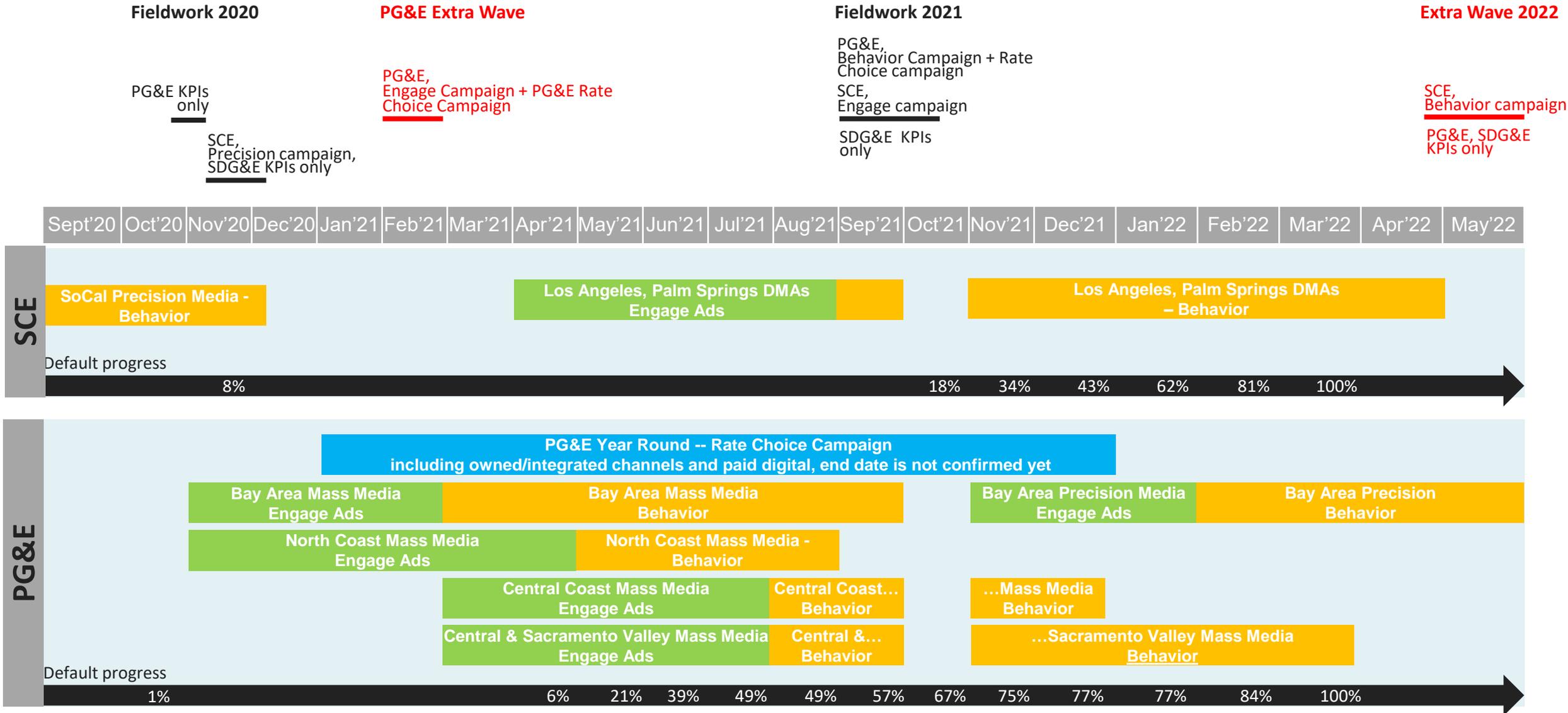
(Redacted)



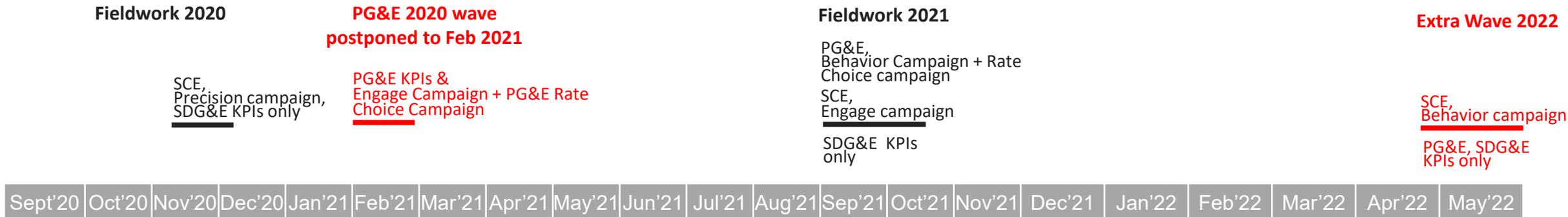
Ipsos

**STATEWIDE EVALUATION
2020-2022 measurement plan**

EUC Measurement plan 2020-2022 – Ideal state



There is a potential to move PG&E 2020 wave to Feb 2021, instead of doing an extra wave in 2021



PROS:

- We will be able to have a read on PG&E Engage part of the campaign before rolling our Behavior part, as well as suggest recommendations for Behavior portion of the campaign for the rest of the year

CONS:

- Our KPI measurement will not align with Statewide 2020 KPI measurement and will not be getting Statewide view on Vision metrics progress
- The only baseline available for campaign evaluation in February will be from 2019 pre-Covid19 time (which maybe not a true reflection of real pre-campaign baseline)

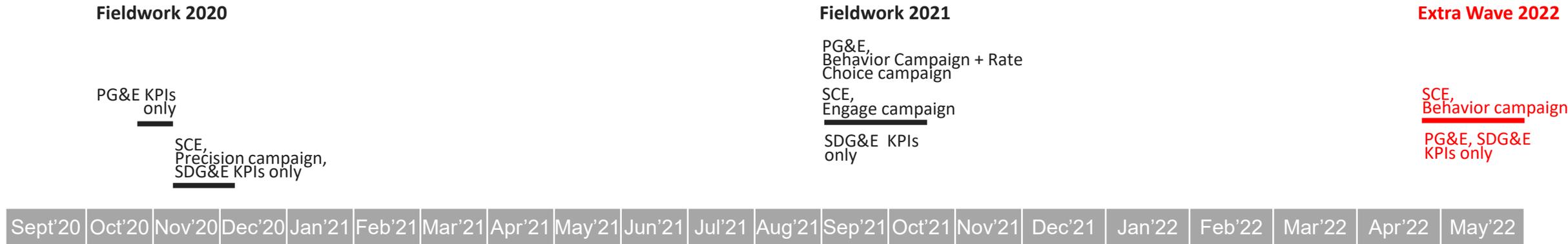
Investment by year (ideal state)

	2020	2021	2022
Already covered through current contract	██████████	██████████	-
Boost to evaluate precision campaign in SCE	██████████	-	-
Extra wave in Feb 2021 in PG&E territory to evaluate Engage part of the campaign as well Rate Choice campaign elements (online only)	-	██████████	-
Extra wave to evaluate KPIs at the end of the default in all territories and SCE Behavior part of the campaign	-	-	██████████
TOTAL	██████████	██████████	██████████

Timing estimates

	2020	2021	2022
Fieldwork for main waves	PG&E: Last week of Oct'20 – first 2 weeks of Nov'20 SCE & SDG&E: Last 2 weeks of Nov'20 – beginning of Dec'20	Aug'21-Sep'21	
Reporting main waves results	Jan'21	Oct'21	
Fieldwork PG&E extra wave		Last 2 weeks of Feb'21	
Reporting for PG&E extra wave		End of Mar'21 – beginning of Apr'21	
Fieldwork 2022 extra wave			May 2022
Reporting 2022 extra wave			End of Jun'22 – beginning of Jul'22

We can also consider no extra wave in Feb 2021 for PG&E territory



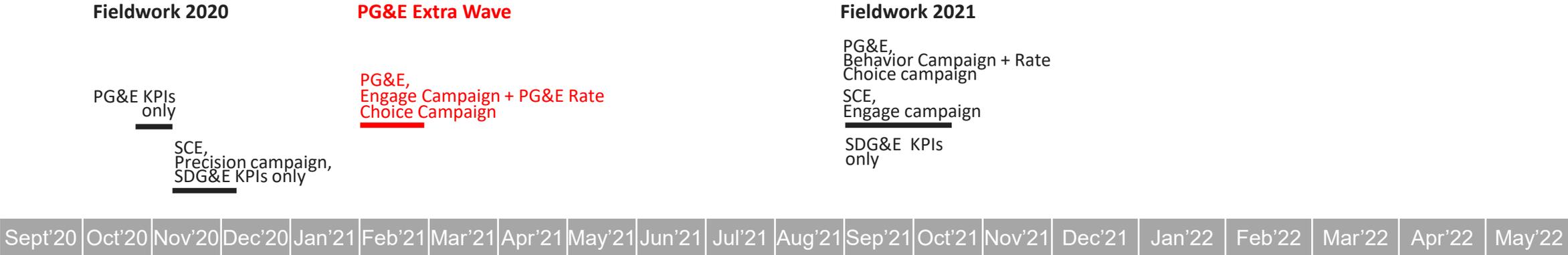
PROS:

- KPI measurement is done at the same time as the rest of the territories,
- Enables Statewide view on Vision Metrics
- Understanding on how territories progress vs. each other

CONS:

- Engage part of the PG&E campaign will be measured together with Behavior part at the end of 2021. Thus, we will only measure residual performance of Engage portion of the campaign (similar to SDG&E)
- We will get the campaign results by the time campaign is complete, which limits actionability

Final 2021 wave can be move to March 22 (end of the default) instead of running an extra KPI wave at the end of the default



PROS:

- KPI measurement is done at the end of the default in all territories so we can draw the line on TOU transition

CONS:

- It'll be too late to evaluate campaign in PG&E territory as only Central & Sacramento Valley would have communication active till then

Example of analysis available for KPI waves

SDG&E is the only IOU defaulting customers and running full campaign including Engagement and Action elements in 2019, hence it's the only IOU that is seeing lifts in Vision Metrics, specifically Rate Choice and Action

	ENGAGEMENT		RATE CHOICE		ACTION	
	% AVERAGE ACROSS ENGAGEMENT STATEMENTS AT TOP BOX*		% AWARE OF RATE CHOICES		% OF SATISFIED WITH THEIR RATE	
	Y1	Y2	Y1	Y2	Y1	Y2
TOTAL STATEWIDE	47	47	29	29	37	43 ▲
PG&E	44	42	28	26	37	38
SCE	49	47	31	28	46	50 ▲
SDG&E	48	50	27	31 ▲	30	42 ▲

*TOP BOX = "STRONGLY AGREE, SCALE IS 5 POINT SCALE FROM STRONGLY AGREE TO STRONGLY DISAGREE. YEAR 1 DATA REWEIGHTED TO MATCH YEAR 2 DATA COLLECTION OF 70% ONLINE SAMPLE AND 30% PHONE SAMPLE. BASE 2018: STATEWIDE N=5147, PG&E N=1680, SCE N=1067, SDG&E N=1774 | BASE 2019: STATEWIDE N=5367, PG&E N=1667, SCE N=1067, SDG&E N=2033. SIGNIFICANT DIFFERENCE BETWEEN YEAR 1 & YEAR 2 IS SHOWN AT 95% CONFIDENCE LEVEL AS HIGHER ▲ OR LOWER ▼

Although, there is no shift at overall Engagement level, "Time of day use matters" is significantly improving in SDG&E area

ENGAGEMENT, top box*

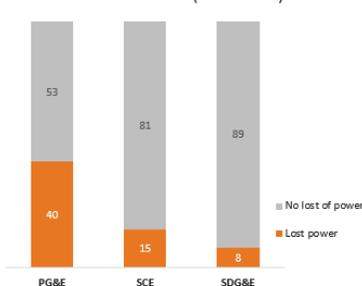
	Total Statewide	PG&E		SCE		SDG&E	
		Y1	Y2	Y1	Y2	Y1	Y2
E1 Personal connection with electricity use	56	55	53	51	57	57	57
E2 Important to manage electricity use	43	43	41	37 ▼	43	44	44
E3 Time of day use matters ▲	40	41	36	36	42	41	40
	41	40	37	35	44	40	43
	60	61	60	57	62	57 ▼	58

*SCALE IS 5 POINT SCALE FROM STRONGLY AGREE TO STRONGLY DISAGREE. TOP BOX = "STRONGLY AGREE". BASE 2018: STATEWIDE N=5147, PG&E N=1680, SCE N=1067, SDG&E N=1774 | BASE 2019: STATEWIDE N=5367, PG&E N=1667, SCE N=1067, SDG&E N=2033. SIGNIFICANT DIFFERENCE BETWEEN YEAR 1 & YEAR 2 IS SHOWN AT 95% CONFIDENCE LEVEL AS HIGHER ▲ OR LOWER ▼

Customers who lost power drove "Trust" perceptions for both PG&E and SCE.

Question Text: Did you lose power during the recent Public Safety Power Shutoff?

% of Those Lost Power (Year2 PSPS)



	PG&E		37% No loss of power
	Y1	Y2	
Is a company I trust, Top 2 Box %	45	34 ▼	28% ▼ Lost power

	SCE		57% No loss of power
	Y1	Y2	
Is a company I trust, Top 2 Box %	61	56 ▼	49% ▼ Lost power

*SCALE IS 5 POINT SCALE FROM STRONGLY AGREE TO STRONGLY DISAGREE. TOP 2 BOX = "STRONGLY AGREE" OR "SOMEWHAT AGREE".

BASE 2018: PG&E N=1680, SCE N=1067, SDG&E N=1774 | BASE 2019: PG&E N=1667, SCE N=1067, SDG&E N=2033. BASE 2019 AFFECTED PSPS: PG&E N=775, SCE N=308, SDG&E N=224. NOT AFFECTED: PG&E N=805, SCE N=1338, SDG&E N=1778. SIGNIFICANT DIFFERENCE BETWEEN YEAR 1 & YEAR 2 IS SHOWN AT 95% CONFIDENCE LEVEL AS HIGHER ▲ OR LOWER ▼

And there is an increase across all Action Vision Metrics in SDG&E area

ACTION ▲, top box*

	Total Statewide	PG&E		SCE		SDG&E	
		Y1	Y2	Y1	Y2	Y1	Y2
A1 Motivation to reduce peak-load ▲	36	37	36	32 ▼	39	36	33
A2 Intent to reduce future peak-load ▲	17	19	16	14	19	18	15
A3 Peak-load reducing behaviors ▲	21	24 ▲	19	18	24	23	20

*SCALE IS 5 POINT SCALE FROM STRONGLY AGREE TO STRONGLY DISAGREE. TOP BOX = "STRONGLY AGREE". BASE 2018: STATEWIDE N=5147, PG&E N=1680, SCE N=1067, SDG&E N=1774 | BASE 2019: STATEWIDE N=5367, PG&E N=1667, SCE N=1067, SDG&E N=2033. SIGNIFICANT DIFFERENCE BETWEEN YEAR 1 & YEAR 2 IS SHOWN AT 95% CONFIDENCE LEVEL AS HIGHER ▲ OR LOWER ▼

SDG&E sees gains on all three Trust metrics. PG&E dips across them while SCE declines in "a company I trust" specifically.

TRUST IN IOU, top 2 box %

	Total Statewide		PG&E		SCE		SDG&E	
	Y1	Y2	Y1	Y2	Y1	Y2	Y1	Y2
Offers programs, information and tips that give customers greater control over their electricity bill	61	59	62	52 ▼	66	65	55	60 ▲
Offers rate plans that could help save you money	51	52	51	46 ▼	58	58	44	51 ▲
Is a company I trust	48	45 ▼	45	34 ▼	61	56 ▼	36	45 ▲

*SCALE IS 5 POINT SCALE FROM STRONGLY AGREE TO STRONGLY DISAGREE. TOP 2 BOX = "STRONGLY AGREE" OR "SOMEWHAT AGREE". BASE 2018: STATEWIDE N=5147, PG&E N=1680, SCE N=1067, SDG&E N=1774 | BASE 2019: STATEWIDE N=5367, PG&E N=1667, SCE N=1067, SDG&E N=2033. SIGNIFICANT DIFFERENCE BETWEEN YEAR 1 & YEAR 2 IS SHOWN AT 95% CONFIDENCE LEVEL AS HIGHER ▲ OR LOWER ▼

Rate metrics reached targets set in Year 1. Engagement and Action Vision were met on two statements in each group

	Y1	Y2	Target Y2
reducing my electricity usage from late afternoon and evening to other times of day	57%	56%	62%
managing my electricity usage at home	44%	46%	50%
managing my electricity use	39%	35%	46%
electricity matters	52%	54%	57%
at certain times of day matters	40%	45%	47%
between peak and non-peak hours	43%	45%	49%
is available so I can decide which rate plan best suits my needs	58%	68%	63%
	27%	31%	29%
	30%	42%	30%
reducing or shifting my electricity usage from late afternoon and evening to other times of	33%	42%	41%
shifting my electricity usage from late afternoon and evening to other times of day	19%	25%	29%
electricity usage from the late afternoon and evening to other times of day	15%	23%	26%
or shift my electricity usage from the late afternoon and evening to other times of day	20%	30%	30%

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A glowing lightbulb sits atop a cylindrical concrete base. The lightbulb is illuminated, casting a warm glow. A black power cord is visible at the bottom right of the base. The background is a plain, light-colored wall.

Thank you

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

AT&T
Albion Power Company

Alta Power Group, LLC
Anderson & Poole

Atlas ReFuel
BART

Barkovich & Yap, Inc.
California Cotton Ginners & Growers Assn
California Energy Commission

California Hub for Energy Efficiency
Financing

California Alternative Energy and
Advanced Transportation Financing
Authority
California Public Utilities Commission
Calpine

Cameron-Daniel, P.C.
Casner, Steve
Cenergy Power
Center for Biological Diversity

Chevron Pipeline and Power
City of Palo Alto

City of San Jose
Clean Power Research
Coast Economic Consulting
Commercial Energy
Crossborder Energy
Crown Road Energy, LLC
Davis Wright Tremaine LLP
Day Carter Murphy

Dept of General Services
Don Pickett & Associates, Inc.
Douglass & Liddell

East Bay Community Energy Ellison
Schneider & Harris LLP Energy
Management Service
Engineers and Scientists of California

GenOn Energy, Inc.
Goodin, MacBride, Squeri, Schlotz &
Ritchie

Green Power Institute
Hanna & Morton
ICF

IGS Energy
International Power Technology
Intestate Gas Services, Inc.
Kelly Group
Ken Bohn Consulting
Keyes & Fox LLP
Leviton Manufacturing Co., Inc.

Los Angeles County Integrated
Waste Management Task Force
MRW & Associates
Manatt Phelps Phillips
Marin Energy Authority
McKenzie & Associates

Modesto Irrigation District
NLine Energy, Inc.
NRG Solar

Office of Ratepayer Advocates
OnGrid Solar
Pacific Gas and Electric Company
Peninsula Clean Energy

Pioneer Community Energy

Redwood Coast Energy Authority
Regulatory & Cogeneration Service, Inc.
SCD Energy Solutions
San Diego Gas & Electric Company

SPURR
San Francisco Water Power and Sewer
Sempra Utilities

Sierra Telephone Company, Inc.
Southern California Edison Company
Southern California Gas Company
Spark Energy
Sun Light & Power
Sunshine Design
Tecogen, Inc.
TerraVerde Renewable Partners
Tiger Natural Gas, Inc.

TransCanada
Utility Cost Management
Utility Power Solutions
Water and Energy Consulting Wellhead
Electric Company
Western Manufactured Housing
Communities Association (WMA)
Yep Energy