

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

Application of Pacific Gas and Electric Company for Approval of Energy Savings Assistance and California Alternate Rates for Energy Programs and Budgets for 2021-2026 Program Years.

U 39 M

Application No. 19-11-003  
(Filed November 4, 2019)

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And Related Matters.

Application 19-11-004  
Application 19-11-005  
Application 19-11-006  
Application 19-11-007

**PACIFIC GAS AND ELECTRIC COMPANY'S (U 39 M) RESPONSE TO ASSIGNED  
COMMISSIONER'S RULING OF JUNE 15, 2020 AND SUPPLEMENTAL  
TESTIMONY**

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Dated: September 4, 2020

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Pacific Gas and Electric Company (PG&E) submits its supplemental testimony pursuant to the *Assigned Commissioner’s Ruling in Response to May 22, 2020 All-Party Meeting on California Alternate Rates for Energy Outreach in Light of COVID* (COVID-19 Ruling) of June 15, 2020. The Ruling Questions directs parties “to file and serve responses to the following questions in their testimony in the consolidated Application (A.) 19-11-003 et al. proceeding.”<sup>1/</sup> See Attachment A-PG&E’s Supplemental Testimony which includes:

- PG&E’s response to the two COVID-19 Ruling questions,
- Removal of PG&E’s the Long-Term CARE Pilot from consideration in PG&E’s Prepared Testimony; and
- Clarifies coordination of auditing and post-installation quality assurance for Energy Savings Assistance Program In-unit and common area measure(s) efforts.

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<sup>1/</sup> Ruling, p. 3.

Respectfully Submitted,

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Dated: September 4, 2020

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# **ATTACHMENT A**

Application: 19-11-003  
(U 39 M)  
Exhibit No.: \_\_\_\_\_  
Date: September 4, 2020  
Witness(es): Lori Leiva Jungbluth  
Erik Olsen  
Neil Singh

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**PACIFIC GAS AND ELECTRIC COMPANY**

**ENERGY SAVINGS ASSISTANCE (ESA), CALIFORNIA ALTERNATE  
RATES FOR ENERGY (CARE) AND FAMILY ELECTRIC RATE  
ASSISTANCE (FERA) PROGRAMS AND BUDGETS APPLICATION  
FOR THE 2021-2026 PROGRAM YEARS (PYS)**

**SUPPLEMENTAL TESTIMONY**

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PACIFIC GAS AND ELECTRIC COMPANY  
ENERGY SAVINGS ASSISTANCE (ESA), CALIFORNIA ALTERNATE RATES FOR  
ENERGY (CARE) AND FAMILY ELECTRIC RATE ASSISTANCE (FERA)  
PROGRAMS AND BUDGETS APPLICATION FOR THE 2021-2026  
PROGRAM YEARS (PYS)  
SUPPLEMENTAL TESTIMONY

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1                                   **PACIFIC GAS AND ELECTRIC COMPANY**  
2   **ENERGY SAVINGS ASSISTANCE (ESA), CALIFORNIA ALTERNATE**  
3                                   **RATES FOR ENERGY (CARE) AND FAMILY ELECTRIC RATE**  
4   **ASSISTANCE (FERA) PROGRAMS AND BUDGETS APPLICATION**  
5                                   **FOR THE 2021-2026 PROGRAM YEARS (PYS)**  
6                                   **SUPPLEMENTAL TESTIMONY**

7   **A. Introduction**

8           Pacific Gas and Electric Company (PG&E) presents its Supplemental  
9    Testimony in response to: (1) Assigned Commissioner’s Ruling in Response to  
10   May 22, 2020 all-party meeting on California Alternate Rates for Energy (CARE)  
11    Outreach in Light of COVID-19 (Ruling), <sup>1</sup>(2) to remove the Long-Term CARE  
12    (LTC) Pilot from consideration in PG&E’s Prepared Testimony; and (3) to submit  
13    information on coordination of auditing and post-installation quality assurance for  
14    Energy Savings Assistance (ESA) Program In-unit and common area measures  
15    (CAM) efforts.

16   **1. COVID-19 Response**

17           On May 22, 2020, to better understand the CARE program’s current  
18    education and outreach efforts during the COVID-19 pandemic, the  
19    Commission held an all-party meeting. As stated in the Ruling, “The  
20    purpose of the meeting was to gain a better understanding of the many  
21    utility efforts underway to increase CARE and Family Electric Rate  
22    Assistance (FERA) education and outreach during the pandemic, and to  
23    consider whether additional actions would be beneficial.”<sup>2</sup>

24           Based on party discussion, the Ruling directs parties to file and serve  
25    responses to questions in their testimony in the consolidated Application  
26    (A.) 19-11-003 et al. proceeding. See Section B for PG&E’s responses to  
27    the Ruling’s questions below.

28   **2. Supplement to Prepared Direct Testimony**

29           PG&E also includes a supplement to its Prepared Direct Testimony to  
30    (1) remove the LTC Pilot from consideration in PG&E’s Prepared Testimony;

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1   Assigned Commissioner’s Ruling in Response to May 22, 2020 all-party meeting on  
  CARE Outreach in Light of COVID-19, June 15, 2020.

2   Ruling, p. 2.

1 and (2) submit information on coordination of auditing and post-installation  
2 quality assurance for ESA Program In-unit and CAM efforts. PG&E  
3 discussed both this change and clarification during the Spring 2020  
4 workshops in this proceeding.

5 **B. Questions From the June 15, 2020 Ruling**

6 **1. What Best Practices Can Be Implemented to Support Community-**  
7 **Based Organization Capitation Work to Result in More CARE and FERA**  
8 **Enrollments, Including in Populations Newly Eligible for the Programs**  
9 **Due to COVID-19? [Witness: Neil Singh]**

10 The COVID-19 pandemic presents new circumstances at a magnitude  
11 never experienced before. Since the impact of COVID-19, PG&E began  
12 expanding current practices to reach those newly eligible for programs.  
13 Since PG&E already has a high CARE penetration rate, PG&E did not  
14 witness a high number of enrollments from the newly eligible population as it  
15 expected through its Community Based Organization's (CBO). PG&E  
16 believes one reason customers may not have enrolled in CARE or FERA is  
17 because of the Federal government's \$600 additional increase per week for  
18 unemployment benefits. PG&E anticipates that when the additional  
19 unemployment benefit expires, more customers may enroll in CARE or  
20 FERA.

21 PG&E already employs the following practices, which have been  
22 successful in the past and gleaned from national income qualified segment  
23 forums and webinars:<sup>3</sup>

- 24 • PG&E increased strategies to leverage CBO networks that serve  
25 impacted local communities. These strategies include leveraging CBOs  
26 that remain open and actively engage in providing critical support for  
27 newly unemployed workers and families, such as local food banks and  
28 food pantries, to distribute CARE/FERA applications and flyers in  
29 Spanish and English. PG&E also provided weatherproof CARE/FERA  
30 posters in English and Spanish for CBOs to display. The posters  
31 include information regarding the online CARE/FERA application.

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3 PG&E is a member of the Utility Customer Research Consortium where it obtains research data and best practices from other utilities across the country.



1 Therefore, while waiting in line for service at places like food banks and  
2 pantries, customer can refer to the posters and apply for PG&E's  
3 income qualified programs.

- 4 • PG&E reached out to faith-based organizations, school districts and  
5 child-care centers already serving income qualified customers, to  
6 increase awareness about CARE/FERA and other similar programs.  
7 These strategies emphasized community support programs where  
8 newly eligible customers are likely to seek immediate assistance as  
9 several of the traditional partners were either providing remote support  
10 or significantly limited due to the shelter in place orders.
- 11 • PG&E initiated efforts to expand the CARE Outreach Contractors (COC)  
12 network by sending invitations to all Low Income Home Energy  
13 Assistance Program and Tribal Temporary Assistance for Needy  
14 Families providers who were not participating in the program.
- 15 • Regardless of COVID-19, PG&E continues to analyze zip codes without  
16 COCs that have high unemployment and penetration of 80 percent or  
17 lower for CARE or FERA. PG&E is actively recruiting new partners for  
18 this program or new partnerships where the COC model may not be the  
19 right approach.

20 75 percent of the new enrollments for CARE and 88 percent for FERA, have  
21 been through digital channels. Digital channels remain the preferred  
22 channel of choice for newly eligible customers. Finally, updated eligibility  
23 estimates from Athens Research are expected in September.<sup>4</sup> These  
24 updated eligibility estimates are expected to include populations newly  
25 eligible due to COVID-19.

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<sup>4</sup> PG&E (U39M) Comments to Administrative Law Judge's Ruling, Attachment A, PG&E Ruling Questions on the Energy Division Staff Proposal, p. 47. Question 33. Filed July 24, 2020.

1           **2. How Does Your Utility Track and Evaluate the Effectiveness of Its**  
2           **Various Care Education and Outreach Channels, and How Is This**  
3           **Information Incorporated Into The Overall Education and Outreach**  
4           **Strategy? [Witness: Erik Olsen]**

5           PG&E tracks and evaluates the effectiveness of its various CARE  
6           education and outreach channels based on customer engagement and  
7           program performance, which is measured by program applications and  
8           enrollment or penetration rate. PG&E’s strategic marketing focus and  
9           continuous improvement efforts over many years resulted in a participation  
10          rate for the CARE Program of 105.1 percent as of July 31, 2020.<sup>5</sup> PG&E  
11          anticipates this penetration rate will likely be impacted when the new Athens  
12          Research data is received, and adjustments to the estimated eligible  
13          customer population are made.

14          In 2018, CARE marketing helped drive a total of 239,000 new  
15          enrollments in the program. For 2019, PG&E marketing of the CARE  
16          Program contributed more than 234,000 new enrollments. During the  
17          program cycle 2017-2020, marketing evolved—placing greater emphasis on  
18          data-driven decision making and using a test-and-learn approach to deliver  
19          more effective acquisition strategies and tactics.

20          While PG&E believes it is important to focus on overall performance and  
21          achieving or exceeding the CARE program goals for penetration, PG&E also  
22          focuses on identifying and targeting markets with lower penetration and  
23          using a variety of strategies to drive engagement and enrollment with hard  
24          to reach audiences.

25          **a. Multi-Channel, Multi-Touch Strategy**

26          PG&E’s multi-channel, multi-touch strategy has led to successful  
27          campaigns that exceeded the 90 percent aspirational target for the past  
28          two years and, despite challenges related to the COVID-19 pandemic, is  
29          on pace to do so again in 2020. Multi-channel marketing benefits  
30          customers by making it easier for customers to engage, such as signing  
31          up for CARE, in whatever channel they are using or comfortable with.  
32          Multi-channel marketing provides customers with a choice. Multi-

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5          ESA and CARE Program Monthly Report for July 2020.

1 channel marketing also allows for repetition, which is important because  
2 the more people hear/see a message, the more familiar it becomes. For  
3 some consumers, it takes hearing a message multiple times before they  
4 act. Through testing, PG&E has found that it can take at least 3-5  
5 messages for some customers to engage.<sup>6</sup>

6 PG&E uses a combination of direct mail and email to co-promote  
7 CARE and FERA. An “always on” digital advertising strategy  
8 complements direct marketing campaigns to increase awareness,  
9 provide reminder messaging, and support new customer enrollments.  
10 The use of broadcast and traffic radio campaigns provide an additional  
11 layer of media, again to drive awareness and enrollment. The sum of  
12 the parts is more important than any individual tactic.

13 PG&E leverages the combined strength of complementary  
14 marketing and outreach to communicate multiple times and in different  
15 channels. PG&E continuously tracks and evaluates performance by  
16 tactic and waves of marketing in order to optimize campaign  
17 performance.

18 In the following section, campaign activities are grouped under the  
19 headings of Acquisition, Retention, and Outreach and Integrated  
20 Communications to explain how various CARE marketing channels are  
21 tracked and evaluated, and how those results are incorporated into  
22 overall strategy.

## 23 **b. Acquisition**

24 PG&E’s acquisition activities focus on targeting newly eligible and  
25 eligible customers that have not responded to prior marketing. These  
26 efforts include:

- 27 • Media and online advertising – PG&E’s current CARE media  
28 campaign is composed of numerous components such as, online  
29 display advertising, email advertising, search marketing, and native  
30 advertising.<sup>7</sup> PG&E currently meets with media and advertising

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6 Frequency and sequence testing results, 2015 CARE End of Season analysis, Executive Summary, p.4, prepared by Targetbase, November 16, 2015.

7 Native Advertising is online advertising which appears in contextually relevant and targeted locations.

1 agency partners on a weekly basis to evaluate the effectiveness of  
2 campaign and creative performance. PG&E uses the following  
3 metrics to optimize media plans and identify opportunities to  
4 increase or decrease media investments based on performance.

- 5 • “Impressions” are the number of times an ad is shown or  
6 displayed. It represents the number of users who were exposed  
7 to the message (whether once or multiple times).

8 Subsequently, the percentage of impressions seen/exposed are  
9 also monitored and optimized through a 3rd party brand safety  
10 partner in order to provide quality impressions. Impressions  
11 give us the ability to benchmark the campaign results by media  
12 type (i.e., how many impressions for digital display banner ads,  
13 how many impressions for radio commercials etc.) to compare  
14 to each other, by month, by quarter, by campaign and year-  
15 over-year.

- 16 • “Clicks” are the number of times an ad is clicked on by a user to  
17 access content related to the Program being promoted and a  
18 measurement of digital creative engagement, to determine initial  
19 banner performance by creative execution.

- 20 • “Click-Through Rates” (CTR) indicate the impressions PG&E is  
21 reaching of an interested audience/or those interested in  
22 clicking to learn more about the CARE program. The higher the  
23 CTR the better: Clicks divided by Impressions equals CTR.

- 24 • “Unique CTR” is used to measure the effectiveness of specific  
25 creative versions as well as media channels.

- 26 • “Web page visits” count the number of times a user visits the  
27 CARE landing page or other designated page content after  
28 seeing or clicking on an ad. Repeat user visits and unique  
29 visitors are tracked. This provides a valuable measure for  
30 understanding if PG&E’s ad is getting a response and getting  
31 customers to the page(s) where we can provide more  
32 information about the program.

- 33 • Completed application submissions and completed application  
34 rates are used to track conversion from interested to engaged.

- 1 • Email and Direct Mail – These are key components of targeted  
2 marketing campaigns and most often used to focus on customers  
3 that are scored highly (most likely to be eligible and participate)  
4 according to PG&E’s CARE propensity model. Email allows for a  
5 larger and more cost-efficient reach to bigger audiences, and direct  
6 mail is used to reach customers that have not opted in to receive  
7 communications via email. Multi-touch direct mail and email  
8 campaigns have a long-running history of success in driving CARE  
9 enrollments,<sup>8</sup> and continue to be a primary acquisition tactic for  
10 CARE. PG&E uses the following metrics to optimize direct mail and  
11 email:
- 12 • Direct mail distribution – measures awareness generated  
13 through the reach of messages and number of customers  
14 touched by campaign creative.
  - 15 • Direct mail response – measures the application submissions  
16 and completed application rates are used to track conversion  
17 from interested to engaged.
  - 18 • Email clicks, CTR are tracked to measure customer  
19 engagement and actions taken.
  - 20 • Email unique open rate and CTR – are used to measure the  
21 effectiveness of specific creative versions and subject lines.
- 22 • Home delivered print tactics: PG&E tested zip-code targeted, home  
23 delivered communications (i.e., door hangers, Val Pak and Retail  
24 Me Not shared mail) in late 2019. Due to the results, PG&E has  
25 adopted and expanded zip-targeted efforts with more marketing  
26 tactics in 2020 to focus on areas with lower penetration, Hard-to-  
27 Reach (HTR) customers and those more likely to be impacted by  
28 recent unemployment. PG&E uses the following metrics to optimize  
29 home delivered print:
- 30 • Distribution – measures awareness generated through the  
31 reach of messages and number of customers touched by  
32 campaign creative.

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<sup>8</sup> PG&E’s Prepared Testimony, Ch. II, p. 30.

- Response – measures the application submissions and completed application rates are used to track conversion from interested to engaged and incremental increases in applications resulting from targeted campaigns.

**c. Retention**

Prior to March 19, 2020, all CARE customers were subject to recertification and post-enrollment verification, referred to as Post Enrollment Verification (PEV). These activities were placed on hold due to the significant impact by the COVID-19 pandemic. However, when recertification and PEV activities resume, PG&E expects to use targeted approaches to encourage customers to recertify their eligibility for the program that may include:

- Auto-re-certification of customers in top deciles as identified by PG&E's CARE propensity model<sup>9</sup> – Customers in top deciles (deciles 1 & 2) are automatically re-certified and continue enrollment in the care program given their high likelihood of continued eligibility.
- Email and Direct Mail – Similar to its use for acquisition of new customers. Direct Mail and targeted email can be used to reach customers nearing re-enrollment points, as well as to maintain ongoing engagement with customers. PG&E typically tracks reenrollment and attrition on a monthly basis, and these campaigns complement program-generated communications.
- CARE Welcome Kit – Once a customer enrolls in CARE, they receive messages about the requirements for ongoing participation in the program via the CARE Welcome Kit. In 2019, PG&E analyzed the impact of the Welcome Kit on CARE customer retention. The analysis showed that the CARE Welcome Kit has had a positive impact on the overall retention of CARE customers. Of those customers who received the Welcome Kit, 43.9 percent

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<sup>9</sup> The current CARE Propensity Model was originally adopted in 2013 and enhanced in 2016 and 2019 to include additional data inputs. Both the original model and the enhanced versions were thoroughly vetted to confirm that customers selected from among high propensity model deciles are more likely to be eligible in CARE than randomly selected customers.

1 recertified for CARE versus a 37.2 percent recertification rate for  
2 customers who did not receive a Welcome Kit. Customers who  
3 received a Welcome Kit also had higher tenure on the CARE  
4 Program by three months compared to those that did not receive the  
5 communication.<sup>10</sup>

6 In addition to supporting CARE retention, the Welcome Kit has  
7 driven enrollment in other PG&E income qualified programs. For  
8 example, in 2018, PG&E added a prefilled ESA lead form and postage  
9 paid reply envelope to the direct mail version of the Welcome Kit to  
10 encourage new CARE customers to apply to participate in ESA. This  
11 communication drove more than 10,000 incremental leads for ESA.<sup>11</sup> In  
12 addition to generating many ESA responses, customer leads from this  
13 CARE Welcome Kit had a higher assessment and treatment rate  
14 compared to other ESA outreach campaigns.<sup>12</sup>

15 PG&E continues to provide all newly enrolled CARE customers a  
16 welcome kit.

#### 17 **d. Outreach and Integrated Communications**

- 18 • Integrated communications – Integrated messages in PG&E's digital  
19 residential newsletter provides messaging reach to a larger  
20 audience. PG&E uses the following metrics to optimize integrated  
21 messaging:
  - 22 • Clicks, CTR- tracked to measure customer engagement and  
23 actions taken.
  - 24 • CARE homepage visits - tracked to measure customer  
25 engagement and actions taken.
- 26 • Community Based Outreach – outreach to HTR audiences. PG&E  
27 uses capitation, or a count of customers enrolled, to track CBO  
28 efforts.

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<sup>10</sup> Appendix E, CARE Welcome Kit Analysis, p. 5, prepared by Targetbase, August 19, 2019.

<sup>11</sup> ESA leads tracked via Edgeline and Webtrends, Q1-Q4, 2018.

<sup>12</sup> ESA 2018 Campaign Analysis, prepared by Targetbase, May 15, 2019.

- 1 • Public Relations (PR) – tactics drive added reach and awareness of  
2 financial assistance programs and can be targeted to regions with  
3 low enrollment. When media placements are successful, cost is  
4 minimal. PG&E monitors media placements and inclusion of  
5 messages as a measure of success for PR efforts.
- 6 • Outreach to Hard-to-Reach and People with Disabilities/Access and  
7 Functional Needs – PG&E continues to support CARE customers  
8 with outreach materials in multiple languages and to provide  
9 disability and aging resources. All forms and brochures that include  
10 the CARE and FERA income guidelines will continue to be updated  
11 annually in compliance with Decision (D.) 12-08-044.<sup>13</sup> Customers  
12 will find program applications in English, Spanish, Chinese,  
13 Vietnamese, and Large Print formats on pge.com and/or by calling  
14 PG&E’s Customer Contact Center where a much larger language  
15 array is supported. Materials are translated into up to 17 languages  
16 and are also available at PG&E local offices and via CBOs. Braille  
17 applications are available by request through the Customer Care  
18 Contact Center.

### 19 **3. Evaluation**

20 PG&E evaluates strategies and tactics, and then optimizes based on  
21 lessons learned so that subsequent campaigns benefit. Rather than relying  
22 only on a year-end evaluation period, or one annual report on effectiveness,  
23 this approach encourages a nimble campaign evaluation and rapid tactical  
24 adjustment to optimize results for campaigns among Hard- to-Reach  
25 audiences and the (remaining) eligible customers who have not yet enrolled.  
26 PG&E also assesses campaigns on a holistic level to understand the  
27 effectiveness of multi-touch (frequency) and multi-channel (reach) marketing  
28 along the customer journey. This enables PG&E to efficiently adjust  
29 budgets towards best performing channels and tactics. Tracking campaign  
30 results against the program goals further determines the overall  
31 effectiveness of campaigns. PG&E’s Prepared Testimony, Chapter II further

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<sup>13</sup> D.12-08-044, p. 409, Ordering Paragraph 119.



1 explains how this information will be incorporated into the overall education  
2 and outreach strategy for 2021-2026.<sup>14</sup>

3 **C. Removal of the LTC Pilot [Witness: Lori Leiva Jungbluth, Erik Olsen]**

4 As of the date of filing PG&E's application, A.19-11-003, there were  
5 271,597 customers who had been enrolled in CARE for 5 or more years  
6 consecutively and never participated in ESA.<sup>15</sup> PG&E assumes these  
7 customers have been approached via outreach materials since all CARE  
8 customers are part of targeted ESA marketing efforts.

9 To effectively target this "long term" CARE population and mitigate the  
10 participation gap, PG&E is proposing a customer research project to replace the  
11 LTC Customer Pilot that was presented in its Application.<sup>16</sup> This change was  
12 discussed and noted in the Low Income Programs Wrap-Up Workshop held on  
13 June 3, 2020. The new research project is expected to focus on marketing and  
14 outreach strategy, communications tactics and specific messaging to gain  
15 greater understanding into the barriers to participation. PG&E expects to  
16 uncover the issues and barriers to participation and then develop messaging  
17 based on research findings to overcome said barriers.

18 It is PG&E's intent to move the budget of \$275,000 associated with the  
19 original LTC Pilot into the Marketing and Outreach budget.

20 Within the new research project proposal, PG&E plans to send out a survey  
21 and possibly conduct interviews with the LTC customers to gather feedback  
22 specifically about what is preventing them from acting. Based on the results,  
23 marketing and outreach materials will be developed specifically for the targeted  
24 group and tested with PG&E's online customer panel and other channels as  
25 appropriate, prior to going out in market.

26 PG&E envisions the following steps as the new research project. A sample  
27 of the targeted population will be identified and segmented in two groups for the  
28 in-market test. Both groups will receive information about responding and  
29 participating in ESA. However, the first group will receive outreach  
30 communications that focuses on the customer's opportunity to enjoy the benefits

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14 Prepared Testimony, Chapter II, p. II-70.

15 Prepared Testimony, Ch. I, p. I-11, Table I-4.

16 Appendix D, Long Term CARE Pilot.

1 of receiving no-cost energy saving products and services with free installation as  
 2 part of the PG&E CARE program. The second group will receive outreach  
 3 communications that focus on the economic impact of potentially missing out on  
 4 the savings and benefits available with ESA. The results will help PG&E to  
 5 develop the most effective messaging and outreach for getting this audience to  
 6 respond. PG&E proposes leveraging existing touchpoints and established  
 7 relationships with the targeted population during this test to promote the ESA  
 8 program.

9 Responses from the two customer groups will be tracked while materials are  
 10 in market and follow up phone calls will be planned with non-responders after  
 11 the marketing and outreach efforts to gather feedback from the targeted  
 12 customers. PG&E also expects to compare the actions and behaviors of the two  
 13 test groups with a control group.

14 The marketing and outreach plan for the test groups would have multiple  
 15 components, such as mailed materials, phone calls, digital communications and  
 16 in person conversations, if possible. Marketing and outreach plans would also  
 17 include multiple languages to best reach the targeted populations.

18 The project planning is expected to begin in late 2023 with implementation in  
 19 2024. The following table provides estimates of time and cost based on initial  
 20 planning assumptions.

**TABLE 1  
 RESEARCH PROJECT – ACTIVITIES, COSTS AND TIMING**

Line No.	Activity	Est. Cost	Approx. Timing (Months)
1	Develop detailed research, test & learn plan	\$10,000	1
2	Develop customer survey/interview guide	10,000	1
3	Conduct research	20,000	1
4	Analyze data and prepare report	10,000	.5
5	Develop marketing materials and test in online customer panel	10,000	1.5
6	Develop marketing materials for outreach	50,000	3
7	Implement outreach communications – 15,000 customers <sup>(a)</sup>	125,000	8-12
8	Data Gathering and Tracking	15,000	8 – 12
9	Analyze Tracking and Response data	15,000	1
10	Prepare Report	10,000	1
11	Total	\$275,000	18 – 20

(a) Much of the forecasted cost is anticipated to be outreach and follow up with the participants.  
 Note: Cost for ESA measures are included in ESA budget request.

1 **D. Submission of Information on Coordination of Auditing and**  
2 **Post-Installation Quality Assurance for ESA Program In-unit and CAM**  
3 **Efforts, (PG&E's Prepared Testimony, Chapter I, pp. I-144, Section D.8.a.ii)**  
4 **[Witness: Lori Leiva Jungbluth]**

5 As for auditing and post-installation quality assurance, CAM and in-unit are  
6 done as separate workstreams, handled by the respective implementers and  
7 PG&E's own inspection team. Auditing for CAM is done by PG&E's CAM  
8 implementer to identify feasible measures and takes place before the project is  
9 committed. In-unit auditing or measure feasibility assessment is done by the  
10 ESA contractor once they have tenant permission. Both the CAM implementer  
11 and PG&E will do a quality check on a percentage of completed CAM  
12 projects. PG&E does the post-installation quality check on a percentage of the  
13 treated in-unit households.

14 **E. Conclusion**

15 PG&E respectfully submits answers to the questions from the All-Party  
16 Meeting on CARE for Commission consideration. In addition, PG&E removes  
17 the LTC Customer Pilot and replaces it with a marketing and outreach research  
18 project, including movement of funds into the Marketing and Outreach budget.  
19 PG&E also submits information on coordination of auditing and post-installation  
20 quality assurance for ESA Program In-unit and CAM efforts.