



# ADVICE LETTER SUMMARY

## ENERGY UTILITY



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

Company name/CPUC Utility No.:

Utility type:

☐ ELC ☐ GAS ☐ WATER  
☐ PLC ☐ HEAT

Contact Person:

Phone #:

E-mail:

E-mail Disposition Notice to:

### EXPLANATION OF UTILITY TYPE

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

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #:

Tier Designation:

Subject of AL:

Keywords (choose from CPUC listing):

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

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

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL:

Summarize differences between the AL and the prior withdrawn or rejected AL:

Confidential treatment requested? ☐ Yes ☐ No

If yes, specification of confidential information:

Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information:

Resolution required? ☐ Yes ☐ No

Requested effective date:

No. of tariff sheets:

Estimated system annual revenue effect (%):

Estimated system average rate effect (%):

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:

Service affected and changes proposed<sup>1</sup>:

Pending advice letters that revise the same tariff sheets:

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

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

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

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

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

## ENERGY Advice Letter Keywords

|                           |  |                                |
|---------------------------|--|--------------------------------|
| Affiliate                 | Direct Access                          | Preliminary Statement          |
| Agreements                | Disconnect Service                     | Procurement                    |
| Agriculture               | ECAC / Energy Cost Adjustment          | Qualifying Facility            |
| Avoided Cost              | EOR / Enhanced Oil Recovery            | Rebates                        |
| Balancing Account         | Energy Charge                          | Refunds                        |
| Baseline                  | Energy Efficiency                      | Reliability                    |
| Bilingual                 | Establish Service                      | Re-MAT/Bio-MAT                 |
| Billings                  | Expand Service Area                    | Revenue Allocation             |
| Bioenergy                 | Forms                                  | Rule 21                        |
| Brokerage Fees            | Franchise Fee / User Tax               | Rules                          |
| CARE                      | G.O. 131-D                             | Section 851                    |
| CPUC Reimbursement Fee    | GRC / General Rate Case                | Self Generation                |
| Capacity                  | Hazardous Waste                        | Service Area Map               |
| Cogeneration              | Increase Rates                         | Service Outage                 |
| Compliance                | Interruptible Service                  | Solar                          |
| Conditions of Service     | Interutility Transportation            | Standby Service                |
| Connection                | LIEE / Low-Income Energy Efficiency    | Storage                        |
| Conservation              | LIRA / Low-Income Ratepayer Assistance | Street Lights                  |
| Consolidate Tariffs       | Late Payment Charge                    | Surcharges                     |
| Contracts                 | Line Extensions                        | Tariffs                        |
| Core                      | Memorandum Account                     | Taxes                          |
| Credit                    | Metered Energy Efficiency              | Text Changes                   |
| Curtailable Service       | Metering                               | Transformer                    |
| Customer Charge           | Mobile Home Parks                      | Transition Cost                |
| Customer Owned Generation | Name Change                            | Transmission Lines             |
| Decrease Rates            | Non-Core                               | Transportation Electrification |
| Demand Charge             | Non-firm Service Contracts             | Transportation Rates           |
| Demand Side Fund          | Nuclear                                | Undergrounding                 |
| Demand Side Management    | Oil Pipelines                          | Voltage Discount               |
| Demand Side Response      | PBR / Performance Based Ratemaking     | Wind Power                     |
| Deposits                  | Portfolio                              | Withdrawal of Service          |
| Depreciation              | Power Lines                            |                                |



February 1, 2021

California Public Utilities Commission  
Energy Division  
Attention: Tariff Unit  
505 Van Ness Avenue, 4th Floor  
San Francisco, CA 94102-3298

**Advice Letter CPA 0008-E**

**SUBJECT: Clean Power Alliance of Southern California's Disadvantaged Communities Green Tariff Program and Community Solar Green Tariff Program Budget Estimates for 2022**

**PURPOSE**

Pursuant to California Public Utilities Commission's (Commission) Resolution E-4999<sup>1</sup> and Resolution E-5102,<sup>2</sup> Clean Power Alliance of Southern California (CPA) respectfully submits this Advice Letter (AL) for approval of its program budget estimates and marketing, education, and outreach (ME&O) plan for CPA's 2022 Disadvantaged Communities Green Tariff (DAC-GT) and Community Solar Green Tariff (CSGT) programs.

**BACKGROUND**

On June 21, 2018, the Commission issued Decision (D.) 18-06-027 adopting new programs to promote the installation of renewable generation among residential customers in Disadvantaged Communities (DACs), as directed by the California Legislature in Assembly Bill (AB) 327 (Perea), Stats. 2013, Ch. 611. Pursuant to D.18-06-027, Community Choice Aggregators (CCAs) may develop and implement their own DAC-GT and CSGT programs. CCA programs must abide by all DAC-GT or CSGT rules and requirements adopted in D. 18-06-027. D. 18-06-027 provides that CCAs must file a tier 3 advice letter to implement the CCA DAC-GT and CSGT programs and allows CCAs to combine DAC-GT and CSGT proposals into one tier 3 advice letter. Resolution E-4999 further stipulates that such advice letters must be filed on or before January 1, 2021 or the capacity allocated to the CCA will be reverted to an IOU or another CCA. Accordingly, CPA filed its tier 3 advice letter on December 27, 2019 to create DAC-GT and CSGT programs consistent with all provisions in D.18-06-027, D.18-10-007, Resolution E-4999, and guidance received from the Commission's Energy Division.

Subsequently, the Commission approved CPA's DAC-GT and CSGT programs by issuing Resolution E-5102 on November 5, 2020. Resolution E-5102 requires CPA to "submit an annual

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<sup>1</sup> CPUC Resolution E-4999 at 67 (OP 2) and 68 (OP 4).

<sup>2</sup> CPUC Resolution E-5102 at 7-8.

program budget estimate and an annual Marketing, Education, and Outreach (ME&O) plan by February 1st of every year, starting in 2021, for the next program year.”<sup>3</sup> Resolution E-4999 provides similar reporting and budgeting requirements and outlines the descriptions to be provided for each budget line item.<sup>4</sup> Additionally, Resolution E-4999 requires quarterly and semi-annual reports regarding capacity procured, capacity online, and customers subscribed, which must be submitted on the first scheduled due date after a program administrator completes its first RFO or has initiated customer enrollment, whichever occurs first.<sup>5</sup> Accordingly, CPA files this Tier 1 AL in compliance with Resolution E-4999 and Resolution E-5102 and submits the annual budget estimate detailed herein for Commission approval.

## **DISCUSSION**

### **1. Pursuant to Resolution E-5102, CPA Submits the Updated Annual Program Budget Estimates for Program Year 2021 and Program Year 2022**

Due to the delayed start of the DAC-GT and CSGT programs, CPA did not record expenses or program enrollment in 2020 and consequently, CPA has made minor upward adjustments to the Program Year (PY) 2021 budget and projections in order to account for additional activity in PY 2021 and the lack of activity in 2020.<sup>6</sup>

For PY 2021, CPA is adjusting the total budget to \$1,695,296 for the DAC-GT and CSGT programs. This includes \$1,176,583 for DAC-GT and \$518,713 for CSGT.

For PY 2022, CPA is proposing a total budget of \$4,206,502 for the DAC-GT and CSGT programs. This includes \$3,408,073 for DAC-GT and \$798,429 for CSGT. Table 1 shows the proposed program budgets by year using the budget categories required in Resolution E-4999. The specific budget categories are discussed further below along with detailed budget information for both programs.

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<sup>3</sup> *Id.* at 8.

<sup>4</sup> Resolution E-4999 at 8 and OPs 2-4.

<sup>5</sup> *Id.* at 39-40.

<sup>6</sup> CPA Advice Letter 0004-E included budget estimates that assumed enrollment of eligible customers for CPA’s DAC-GT program would commence in July 2020. This assumption did not hold because Advice Letter 0004-E was not approved by the Commission until November 5, 2020 through Resolution E-5102 and CPA’s DAC-GT and CSGT solicitation materials were not approved by the Commission until December 14, 2020 through a non-standard disposition letter (Energy Division Disposition Letter Approving Clean Power Alliance (CPA) Advice Letter 0006-E: Disadvantaged Communities Green Tariff Program and Community Solar Green Tariff Program Solicitation Materials).

**Table 1. CPA's Proposed Budgets for DAC-GT and CSGT for PY 2021 and PY 2022**

| Category                        | DAC-GT |             |             |             | CSGT |           |           |             | Overall Total      |
|---------------------------------|--------|-------------|-------------|-------------|------|-----------|-----------|-------------|--------------------|
|                                 | 2020   | 2021        | 2022        | Total       | 2020 | 2021      | 2022      | Total       |                    |
| Generation Cost Delta           | \$-    | \$89,279    | \$1,571,524 | \$1,660,803 | \$-  | \$-       | \$35,557  | \$35,557    | <b>\$1,696,360</b> |
| 20% Bill Discount               | \$-    | \$324,591   | \$1,119,006 | \$1,443,596 | \$-  | \$-       | \$12,328  | \$12,328    | <b>\$1,455,925</b> |
| Program Administration          | \$-    | \$335,713   | \$362,544   | \$698,257   | \$-  | \$335,713 | \$362,544 | \$698,257   | <b>\$1,396,513</b> |
| Marketing, Education & Outreach | \$-    | \$427,000   | \$355,000   | \$782,000   | \$-  | \$183,000 | \$388,000 | \$571,000   | <b>\$1,353,000</b> |
| Independent Evaluator           | \$-    | \$-         | \$-         | \$-         | \$-  | \$-       | \$-       | \$-         | <b>\$-</b>         |
| Total                           | \$-    | \$1,176,583 | \$3,408,073 | \$4,584,656 | \$-  | \$518,713 | \$798,429 | \$1,317,142 | <b>\$5,901,798</b> |

### **a. Budget Details**

Resolution E-4999 requires that annual budget submissions include the following:<sup>7</sup>

- Line items for generation cost deltas
- 20 percent bill discount for all participating customers
- Program administration costs
- ME&O funding
- Independent evaluator

CPA addresses these five requirements in the following subsections.

### **i. Above Market Generation Costs**

CPA does not anticipate having new CSGT projects online in PY 2021 due to lead times of permitting, construction, and interconnection processes. The first CSGT project is estimated to reach commercial operation in late 2022. CPA anticipates securing existing DAC-GT qualified renewable energy and enrolling eligible DAC-GT customers starting in the first quarter of PY 2021.

The above-market generation cost for DAC-GT and CSGT in PY 2021 and PY 2022 will be calculated by comparing the generation cost for DAC-GT and CSGT resources to the generation cost for the base product – CPA's "Clean Power" product – that customers would otherwise receive if they were not participating in the programs. The generation cost for the base product is a weighted average of the generation costs of the product's renewable and non-renewable content, including Resource Adequacy. The delta between this weighted average cost and the generation cost of the DAC-GT resource was then multiplied by the forecasted volume to be served each month to arrive at the total generation cost delta from the program. The methodology and assumptions used to calculate the generation cost deltas are detailed in Appendix A of this AL.

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<sup>7</sup> *Id.* at 67 (OP 2).

The budget estimates for the generation cost delta in PY 2022 are summarized in Table 2.

**Table 2: CPA's Estimated Generation Cost Delta for DAC-GT and CSGT for PY 2021 and PY 2022**

|                                 | DAC-GT |           |             |             | CSGT |      |          |          |
|---------------------------------|--------|-----------|-------------|-------------|------|------|----------|----------|
|                                 | 2020   | 2021      | 2022        | Total       | 2020 | 2021 | 2022     | Total    |
| Total customer load (kWh)       | 0      | 8,862,150 | 29,750,100  | 38,612,250  | 0    | 0    | 327,762  | 327,762  |
| Total unsubscribed output (kWh) | 0      | 0         | 0           | 0           | 0    | 0    | 0        | 0        |
| Total volume (kWh)              | 0      | 8,862,150 | 29,750,100  | 38,612,250  | 0    | 0    | 327,762  | 327,762  |
| Generation cost delta           | \$-    | \$89,279  | \$1,571,524 | \$1,660,803 | \$-  | \$-  | \$35,557 | \$35,557 |

## ii. 20 Percent Bill Discount

As described in this advice letter, program participants will receive a 20 percent discount on the otherwise applicable rate, to be applied as a bill credit to their CPA utility charges. CPA's PY 2021 and PY 2022 budgets include the estimated total amount of the customer bill discount to be recovered, as summarized in Table 3. The budget estimates are based on forecasted monthly enrollment in the DAC-GT program and average monthly CARE customer bills in CPA's service territory. The assumptions and calculations used to estimate the customer bill discounts are detailed in Appendix A.

**Table 3: CPA's Estimated 20 Percent Bill Discount Costs for DAC-GT and CSGT for PY 2021 and PY 2022**

|   | DAC-GT |           |             |             | CSGT |      |          |          | Totals      |
|---|--------|-----------|-------------|-------------|------|------|----------|----------|-------------|
|   | 2020   | 2021      | 2022        | Total       | 2020 | 2021 | 2022     | Total    |             |
| Total New Customer Enrollment Each Year | -      | 3,900     | 2,890       |             | -    | -    | 278      |          |             |
| Cumulative Customers Enrolled           | -      | 3,900     | 6,790       | 6,790       | -    | -    | 278      | 278      | 7,068       |
| 20 Percent Bill Discount Paid Each Year | \$-    | \$324,591 | \$1,119,006 | \$1,443,596 | \$-  | \$-  | \$12,328 | \$12,328 | \$1,455,925 |

## iii. Program Administration Costs

Administration costs are broken into Program Management, Information Technology (IT), Billing Operations, Regulatory Compliance, and Procurement. These cost categories are discussed further in the following subsections. Resolution E-4999 adopts a cap of 10 percent of each program's total annual budget to be allocated to Program Administration.<sup>8</sup> However, Resolution E-4999 acknowledges that startup costs may be higher in the early years of the programs and allows

<sup>8</sup> *Id.* at 57 (Findings and Conclusions ¶ 41).

administrative costs above the 10 percent cap for the initial budget.<sup>9</sup>

For PY 2021, CPA estimates total Program Administration costs of \$335,713 for DAC-GT, which is 29% of the total DAC-GT budget of \$1,176,583. For CSGT in PY 2021, CPA estimates total Program Administration costs of \$335,713 which is 65% of the total CSGT budget of \$518,713. The percentage of Program Administration budget compared to the overall program budgets is currently higher than 10 percent cap because (1) the budget includes initial program startup costs, which as acknowledged in Resolution E-4999, startup costs can be higher in the early years of the program<sup>10</sup> and (2) because the DAC-GT and CSGT programs will not be fully enrolled in PY 2021 and PY 2022, and therefore the total program budgets for PY 2021 and PY 2022 do not include fully enrolled costs for the 20 percent bill discount or above market generation costs. Table 4 shows the total proposed Program Administration costs for the two programs for both PY 2021 and PY 2022 and the estimates are discussed in further detail as follows.

**Table 4: CPA's Proposed Program Administration Budgets for DAC-GT and CSGT for PY 2021 and PY 2022**

| Category               | DAC-GT |           |           |           | CSGT |           |           |           | Overall Total      |
|------------------------|--------|-----------|-----------|-----------|------|-----------|-----------|-----------|--------------------|
|                        | 2020   | 2021      | 2022      | Total     | 2020 | 2021      | 2022      | Total     |                    |
| Program Management     | \$-    | \$260,713 | \$287,544 | \$548,257 | \$-  | \$260,713 | \$287,544 | \$548,257 | <b>\$1,096,513</b> |
| Information Technology | \$-    | \$-       | \$-       | \$-       | \$-  | \$-       | \$-       | \$-       | \$-                |
| Billing Operations     | \$-    | \$-       | \$-       | \$-       | \$-  | \$-       | \$-       | \$-       | \$-                |
| Regulatory Compliance  | \$-    | \$-       | \$-       | \$-       | \$-  | \$-       | \$-       | \$-       | \$-                |
| Procurement            | \$-    | \$75,000  | \$75,000  | \$150,000 | \$-  | \$75,000  | \$75,000  | \$150,000 | <b>\$300,000</b>   |
| Total                  | \$-    | \$335,713 | \$362,544 | \$698,257 | \$-  | \$335,713 | \$362,544 | \$698,257 | <b>\$1,396,513</b> |

### **1. Program Management**

CPA estimates program management costs of \$521,426 in PY 2021 for staff time to design and initiate program implementation, marketing, procurement, and ensure coordination with Southern California Edison Company (SCE) and the Commission for budgetary and regulatory compliance. CPA anticipates a budget of \$575,088 for PY 2022. Program management costs are shared across the two programs and split evenly between the two program budgets. Table 5 shows the details of the program management budget proposed for PY 2021 and PY 2022.

<sup>9</sup> *Id.* at 57 (Findings and Conclusions ¶ 42).

<sup>10</sup> PY 2021 and PY 2022 are the startup years for CPA's DAC-GT and CSGT programs given that the Commission approved CPA's DAC-GT and CSGT programs on November 5, 2020.



**Table 5: Program Management Budget Details**

| Position                        | 2020 Hours | 2020 Total Labor Spend | 2021 Fully Loaded Hourly Rate | 2021 % Yr | 2021 Hours  | 2021 Total Labor Spend | 2022 Fully Loaded Hourly Rate | 2022 % Yr | 2022 Hours  | 2022 Total Labor Spend |
|---------------------------------|------------|------------------------|-------------------------------|-----------|-------------|------------------------|-------------------------------|-----------|-------------|------------------------|
| Program Manager                 | 0          | \$0                    | \$116.06                      | 80%       | 1,664       | \$193,130              | \$120.71                      | 80%       | 1,664       | \$200,856              |
| Program Associate               | 0          | \$0                    | \$66.47                       | 70%       | 1,456       | \$96,779               | \$69.13                       | 70%       | 1,456       | \$100,650              |
| Financial Manager               | 0          | \$0                    | \$123.10                      | 10%       | 208         | \$25,604               | \$128.02                      | 12%       | 250         | \$31,954               |
| Procurement & Contracts Manager | 0          | \$0                    | \$120.42                      | 20%       | 416         | \$50,094               | \$125.24                      | 25%       | 520         | \$65,123               |
| Procurement/Contracts Associate | 0          | \$0                    | \$56.28                       | 50%       | 1,040       | \$58,528               | \$58.53                       | 50%       | 1,040       | \$60,869               |
| Marketing Manager               | 0          | \$0                    | \$66.82                       | 70%       | 1,456       | \$97,290               | \$69.49                       | 80%       | 1,664       | \$115,636              |
| <b>Total</b>                    | <b>0</b>   | <b>\$0</b>             |                               |           | <b>6240</b> | <b>\$521,426</b>       |                               |           | <b>6594</b> | <b>\$575,088</b>       |

## 2. Information Technology (IT)

CPA does not expect to incur any incremental IT costs for the DAC-GT and CSGT programs during PY 2021 and PY 2022 beyond the website enhancements which are included in the ME&O budget.

## 3. Billing Operations

CPA does not expect to incur any incremental billing operations costs for the DAC-GT and CSGT programs during PY 2021 and PY 2022 beyond the website enhancements which are included in the ME&O budget.

## 4. Regulatory Compliance

CPA does not estimate any specific regulatory compliance costs associated with the DAC-GT and CSGT programs. CPA assumes the regulatory support for these two programs will be absorbed in its general Regulatory Affairs budget.

## 5. Procurement

CPA estimates total procurement costs of \$150,000 for DAC-GT and CSGT programs in PY 2021. CPA estimates total procurement costs of \$150,000 for DAC-GT and CSGT programs in PY 2022. Procurement cost estimates were determined by taking actual costs from prior CPA distributed resource solicitations and adjusting them based on the size, scope, and complexity of the solicitations for these programs. With the exception of the Community Solar Consulting expense, which is allocated only to the CSGT program, these costs are shared among the two programs and are spread evenly across the two programs for purposes of setting program-specific budgets.

**Table 6: Procurement Budget Details**

| Category                   | 2020       | 2021             | 2022             | Total            | Notes   |
|----------------------------|------------|------------------|------------------|------------------|---|
| RFO Administration         | \$-        | \$-              | \$-              | \$-              | Leverage existing forms and perform RFO administration in-house (See Program Management Budget) |
| RFO Valuation              | \$-        | \$-              | \$-              | \$-              | In-house Valuation conducted by Resource Planner (See Program Management Budget)                |
| Community Solar Consulting | \$-        | \$100,000        | \$100,000        | \$200,000        | Site identification and feasibility studies   |
| Legal                      | \$-        | \$50,000         | \$50,000         | \$100,000        | Assumes standard pro forma contract with minimal edits  |
| <b>Total</b>               | <b>\$-</b> | <b>\$150,000</b> | <b>\$150,000</b> | <b>\$300,000</b> |   |

RFO Administration represents costs for a third party to conduct RFO administration services, including a web-based platform to take in bids, manage communications from and with bidders, and ensure the RFO is conducted in conformance with the RFO Protocol. RFO Valuation represents costs for a third party to conduct RFO valuation services, including ensuring that bid submissions are in conformance with the RFO project eligibility requirements and performing analysis to determine quantitative and qualitative assessment of bids.

There are no current costs reflected in RFO Administration and RFO Valuation because CPA anticipates conducting these activities using in-house resources, rather than using a third party, which is reflected in this updated budget. In-house resource costs are detailed in the Program Management Budget. In addition, CPA will partner with its member jurisdictions to take an active role in identifying community solar sites within its service territory. The Community Solar Consulting line item represents third-party costs for site and project sponsor identification and site feasibility analysis. Legal includes costs for external legal counsel to support PPA negotiations, assuming use of the standard pro forma contract with minimal edits.

#### **iv. ME&O Funding**

For PY 2021, CPA estimates total ME&O costs of \$427,000 for DAC-GT, which is 36% percent of its total budget of \$1,176,583. For CSGT for PY 2021, CPA estimates total ME&O costs of \$183,000, which is 35% percent of its total budget of \$518,713.

For PY 2022, CPA estimates total ME&O costs of \$355,000 for DAC-GT, which is 10% percent of its total budget of \$3,408,073. For CSGT for PY 2022, CPA estimates total ME&O costs of \$388,000, which is 49% percent of its total budget of \$798,429. Resolution E-4999 adopts a cap of 4 percent of each program's total annual budget to be allocated to ME&O.<sup>11</sup> However, Resolution E-4999 acknowledges that startup costs may be higher in the early years of the programs and allows ME&O costs above the 4 percent cap for the initial budget.<sup>12</sup>

ME&O costs are higher in PY 2021 and PY 2022 for DAC-GT because enrollment is anticipated

<sup>11</sup> *Id.* at 57 (Findings and Conclusions ¶ 41).

<sup>12</sup> *Id.* at 57 (Findings and Conclusions ¶ 42).

to begin in 2021, whereas enrollment for the CSGT will not begin until late 2022, with the majority of the program being subscribed after 2022. The percentage of ME&O budget compared to the overall program budgets is currently higher than 4 percent because it includes start-up and outreach costs, which, as acknowledged in Resolution E-4999, can be higher than the cap in the early years of the program<sup>13</sup> and because the total budget for PY 2021 and PY 2022 does not include fully enrolled costs for the 20 percent bill discount or above-market generation. CPA anticipates meeting the 4 percent cap for ME&O costs by PY 2023 as startup costs decrease, program enrollment increases and marketing, and outreach costs decline.

CPA plans to implement the proposed ME&O efforts with a combination of third party creative and digital agencies and other print and media vendors. These vendors will be awarded contracts in accordance with all CPA procurement policies and procedures. To determine the budget estimates for ME&O for DAC-GT and CSGT, CPA worked with its current third party vendors to develop proxy estimates based on detailed estimated and/or actual spend for similar ME&O activities for similar programs. These estimates include costs for graphic design and production, translation, printing and mailing, website design, and social media and paid media buys. Further details are included in CPA’s annual ME&O plan, which is attached hereto as Appendix B.

The ME&O budget also includes a line item for outreach grants to community-based organizations (“CBOs”) (including eligible Community Sponsors) with whom CPA will collaborate to support customer outreach, education, and enrollment in DACs.

**Table 7: CPA’s Proposed ME&O Budget for DAC-GT and CSGT for PY 2021 and PY 2022**

| Category                                  | DAC-GT |           |           |           | CSGT |          |           |           | Total     |
|---|--------|-----------|-----------|-----------|------|----------|-----------|-----------|-----------|
|   | 2020   | 2021      | 2022      | Total     | 2020 | 2021     | 2022      | Total     |           |
| Grassroots Marketing                      |        |           |           |           |      |          |           |           |           |
| CBO grants                                | \$-    | \$60,000  | \$60,000  | \$120,000 | \$-  | \$60,000 | \$60,000  | \$120,000 | \$240,000 |
| Event display materials/<br>handouts/etc. | \$-    | \$35,000  | \$35,000  | \$70,000  | \$-  | \$35,000 | \$50,000  | \$85,000  | \$155,000 |
| Total                                     | \$-    | \$95,000  | \$95,000  | \$190,000 | \$-  | \$95,000 | \$110,000 | \$205,000 | \$395,000 |
| Targeted Marketing                        |        |           |           |           |      |          |           |           |           |
| Direct mail postage/printing              | \$-    | \$100,000 | \$100,000 | \$200,000 | \$-  | \$-      | \$150,000 | \$150,000 | \$350,000 |
| Ethnic media radio ads                    | \$-    | \$10,000  | \$-       | \$10,000  | \$-  | \$-      | \$-       | \$-       | \$10,000  |
| Ethnic media print ads                    | \$-    | \$25,000  | \$-       | \$25,000  | \$-  | \$-      | \$-       | \$-       | \$25,000  |
| Graphic design                            | \$-    | \$25,000  | \$40,000  | \$65,000  | \$-  | \$-      | \$15,000  | \$15,000  | \$80,000  |
| Translation services                      | \$-    | \$-       | \$-       | \$-       | \$-  | \$-      | \$10,000  | \$10,000  | \$10,000  |
| Total                                     | \$-    | \$160,000 | \$140,000 | \$300,000 | \$-  | \$-      | \$175,000 | \$175,000 | \$475,000 |
| Broad-based Marketing                     |        |           |           |           |      |          |           |           |           |

<sup>13</sup> PY 2021 and PY 2022 are the startup years for CPA’s DAC-GT and CSGT programs given that the Commission approved CPA’s DAC-GT and CSGT programs on November 5, 2020.

|   |     |                  |                  |                  |     |                  |                  |                  |                    |
|---|-----|------------------|------------------|------------------|-----|------------------|------------------|------------------|--------------------|
| Social media ads                          | \$- | \$12,000         | \$-              | \$12,000         | \$- | \$-              | \$-              | \$-              | \$12,000           |
| Digital ads                               | \$- | \$40,000         | \$-              | \$40,000         | \$- | \$10,000         | \$10,000         | \$20,000         | \$60,000           |
| Graphic design                            | \$- | \$25,000         | \$25,000         | \$50,000         | \$- | \$20,000         | \$25,000         | \$45,000         | \$95,000           |
| Flyers/fact sheets printing               | \$- | \$30,000         | \$30,000         | \$60,000         | \$- | \$20,000         | \$30,000         | \$50,000         | \$110,000          |
| Translation services                      | \$- | \$15,000         | \$15,000         | \$30,000         | \$- | \$20,000         | \$20,000         | \$40,000         | \$70,000           |
| Website graphic design                    | \$- | \$10,000         | \$10,000         | \$20,000         | \$- | \$15,000         | \$15,000         | \$30,000         | \$50,000           |
| Web page translations                     | \$- | \$-              | \$-              | \$-              | \$- | \$3,000          | \$3,000          | \$6,000          | \$6,000            |
| <i>Total</i>                              | \$- | <i>\$132,000</i> | <i>\$80,000</i>  | <i>\$212,000</i> | \$- | <i>\$88,000</i>  | <i>\$103,000</i> | <i>\$191,000</i> | <i>\$403,000</i>   |
| <b>Research</b>                           |     |                  |                  |                  |     |                  |                  |                  |                    |
| Customer focus groups (partic. incentive) | \$- | \$40,000         | \$40,000         | \$80,000         | \$- | \$-              | \$-              | \$-              | \$80,000           |
| Translation services                      | \$- | \$-              | \$-              | \$-              | \$- | \$-              | \$-              | \$-              | \$-                |
| Focus group meeting expenses (child care) | \$- | \$-              | \$-              | \$-              | \$- | \$-              | \$-              | \$-              | \$-                |
| <i>Total</i>                              | \$- | <i>\$40,000</i>  | <i>\$40,000</i>  | <i>\$80,000</i>  | \$- | \$-              | \$-              | \$-              | <i>\$80,000</i>    |
| <b>TOTAL</b>                              | \$- | <b>\$427,000</b> | <b>\$355,000</b> | <b>\$782,000</b> | \$- | <b>\$183,000</b> | <b>\$388,000</b> | <b>\$571,000</b> | <b>\$1,353,000</b> |

## v. Independent Evaluator Funding

Resolution E-4999 requires IOUs to include a budget for a proportional share of funding for an independent evaluator to review the DAC-GT and CSGT programs every three years beginning in PY 2021<sup>14</sup> and to review the CSGT program after the first year that customers are able to subscribe to the program.<sup>15</sup>

Resolution E-5102 states that “responsibilities for funding the independent evaluator review remain with the IOUs for each service territory in which a CCA resides.”<sup>16</sup> Pursuant to Resolution E-5102, CPA will not budget any funds for the statewide independent evaluator.

## b. Program Capacity and Customer Details

Resolution E-4999 states, “for each program, the budget submission must include details on the program’s existing capacity, the capacity targeted for procurement in that program year, the number of customers currently served, and the number of additional customers estimated to be served.”<sup>17</sup> Table 8 provides this information for the PY 2021 and PY 2022 budgets.

<sup>14</sup> *Id.* at 68, OP 5.

<sup>15</sup> *Id.* at 31.

<sup>16</sup> Resolution E-5102 at 8.

<sup>17</sup> Resolution E-4999 at 27.

**Table 8. CPA Targeted DAC-GT and CSGT Program Capacity and Enrollment**

| Program Detail  | DAC-GT |           |            | CSGT  |       |         |
|---|--------|-----------|------------|-------|-------|---------|
|   | 2020   | 2021      | 2022       | 2020  | 2021  | 2022    |
| Existing Capacity at beginning of period*             | 0 MW   | 0 MW      | 7.00 MW    | 0 MW  | 0 MW  | 0 MW    |
| Capacity targeted for procurement*                    | 0 MW   | 7.00 MW   | 12.19 MW   | 0 MW  | 0 MW  | .5 MW   |
| Number of customers currently served                  | 0      | 0         | 3,900      | 0     | 0     | 0       |
| Number of additional customers estimated to be served | 0      | 3,900     | 2,890      | 0     | 0     | 278     |
| Total customer load                                   | 0 MWh  | 8,862 MWh | 29,750 MWh | 0 MWh | 0 MWh | 328 MWh |

**c. GHG Revenue Set Asides**

Upon approval of this AL, SCE will include CPA's PY 2022 program budget in its 2022 ERRRA Forecast in June 2021. Going forward, SCE will remit program funds to CPA in quarterly installments (by January 1, April 1, July 1 and October 1 of each year).

In accordance with Resolution E-4999, once received, CPA will track the program funds in separate accounts for CSGT and DAC-GT programs and will record all generation cost deltas, customer bill discounts, and program expenses for each program.<sup>18</sup> CPA's 2023 Annual Budget Advice Letter will include a reconciliation of the PY 2021 budget estimate with actual expenditures, along with adjustments as needed to the PY 2022 budget forecast.

**2. Quarterly and Semi-Annual Reports**

In accordance with Resolution E-4999, CPA will not be filing quarterly or semi-annual reports for its DAC-GT or CSGT programs until the first RFO is completed or customer enrollment has begun for each program. CPA anticipates customer enrollment in the DAC-GT program will begin during the first quarter of 2021.

**APPENDICES**

Appendix A: Work Papers for Generation Cost Delta And 20 Percent Bill Discount

Appendix B: Annual Marketing, Education, and Outreach Plan

**TIER DESIGNATION**

Pursuant to General Order (GO) 96-B, Energy Industry Rule 5.2, Resolution E-4999, and Resolution E-5102, this AL is submitted with a Tier 1 designation.

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<sup>18</sup> *Id.* at 26-27.

## **EFFECTIVE DATE**

This AL will become effective on February 1, 2021, which is the same day as the date of its submission.

## **NOTICE**

Anyone wishing to protest this AL may do so by letter via U.S. Mail, facsimile, or electronically, any of which must be received by the Energy Division and CPA no later than 20 days after the date of this AL. Protests should be submitted to:

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

In addition, protests and all other correspondence regarding this AL should be sent by letter or transmitted electronically to the attention of:

C.C. Song  
Director of Regulatory Affairs  
Clean Power Alliance of Southern California  
801 S. Grand Ave., Suite 400  
Los Angeles, CA 90017  
Email: [csong@cleanpoweralliance.org](mailto:csong@cleanpoweralliance.org)

Francis Choi  
Regulatory Analyst  
Clean Power Alliance of Southern California  
801 S. Grand Ave., Suite 400  
Los Angeles, CA 90017  
Email: [fchoi@cleanpoweralliance.org](mailto:fchoi@cleanpoweralliance.org)

There are no restrictions on who may file a protest, but the protest shall set forth specifically the grounds upon which it is based and shall be submitted expeditiously.

In accordance with General Rule 4 of GO 96-B, CPA is serving copies of this AL to the interested parties shown on the R.14-07-002 service list. Pursuant to the March 20, 2020 order (as updated on September 18, 2020) from the Executive Director of the Commission waiving the hard copy filing requirements for advice letters pursuant to GO 96-B Rule 1.3, CPA will not be filing a hard copy of this AL. For changes to these service lists, please contact the Commission's Process Office at (415) 703-2021 or by electronic mail at [Process\\_Office@cpuc.ca.gov](mailto:Process_Office@cpuc.ca.gov).

## Appendix A: Work Papers for Generation Cost Delta and 20 Percent Bill Discount

### 2021 Above Market Generation Costs - DAC GT

| Inputs    |            |  |   |
|-----------|------------|--|---|
| 40.49     | \$/MWh     | Energy Index Cost - ICE DA forwards SP15             |   |
| 6.00      | \$/MWh     | CF   | 0% Percent of "Clean" non-renewable portion     |
| 15.69     | \$/MWh     | PCC1 Cost  | 66% Percent of "Clean" renewable portion        |
| 10.5      | \$/MWh     | PCC2 Cost  | 13% Percent of "Clean" renewable portion        |
| 3.5       | \$/MWh     | PCC3 Cost  | 0% Percent of "Clean" renewable portion         |
| 46.64     | \$/MWh     | PPA Cost   | 21% Percent of "Clean" renewable portion        |
| 16.00     | \$/MWh     | DAC PCC1 Cost  | 100% Percent of DAC portfolio renewable portion |
| 154.90    | \$/MWh     | DAC PPA Cost   | 0% Percent of DAC portfolio renewable portion   |
| 50%       |            | non-renewable portion of applicable CPA "Clean" rate |   |
| 50%       |            | renewable portion of applicable CPA "Clean" rate     |   |
|           |            | kWh total program volume 2020                        |   |
| 8,862,150 |            | kWh total program volume 2021                        |   |
|           |            | kWh total program volume 2022                        |   |
| 3.98      | \$/kWmonth | RA Average   |   |
| 5.53      | \$/MWh     | RA Average   |   |
| 5.53      | \$/MWh     | RA Average - for DAC PCC1s                           |   |
| 0.77      | \$/MWh     | RA Average Value for DAC PPA                         |   |

|    |       |      |   |                                       |   |   |
|----|-------|------|---|---------------------------------------|---|---|
| \$ | 0.046 | /kwh | A | average non-renewable generation cost | = | Energy Index, Carbon Free, plus RA  |
| \$ | 0.058 | /kwh | B | renewable generation cost             | = | Weighted PCC1, PCC2, PCC3 Plus Energy and RA, and PPA value                 |
| \$ | 0.062 | /kwh | C | DAC program generation cost           | = | PCC1 for interim DAC resources from SCE plus RA, and DAC PPA value minus RA |

Volume kwh

|  | 2020 | 2021      | 2022 |     |                      |
|--|------|-----------|------|-----|----------------------|
|  | -    | 8,862,150 | -    | kwh | total volume         |
|  | -    | 4,431,075 | -    | kwh | non-renewable volume |
|  | -    | 4,431,075 | -    | kwh | renewable volume     |

Avg Customer Load

393

Above market generation costs =  
[(C-A)\*volume]+[(C-B)\*volume]

|    |       |      |     |   |
|----|-------|------|-----|---|
| \$ | 0.016 | /kwh | C-A | the additional cost per kwh of generation to procure DAC program renewable in place of the non-renewable we would otherwise have procured |
| \$ | 0.004 | /kwh | C-B | the additional cost per kwh of generation to procure DAC program renewable in place of the renewable we would otherwise have procured     |

Total above market costs per year

|    | 2020 | 2021      | 2022 |  |
|----|------|-----------|------|--|
| \$ | -    | \$ 70,897 | \$ - | (C-A)*volume total above market cost for non-renewable portion of generation |
| \$ | -    | \$ 18,382 | \$ - | (C-B)*volume total above market cost for renewable portion of generation     |
| \$ | -    | \$ 89,279 | \$ - | total above market costs   |

Projected DAC-GT Enrollment and Volume by Month

| DAC-GT 2020                   |   |   |   |   |   |   |   |   |   |    |    |    |       |
|-------------------------------|---|---|---|---|---|---|---|---|---|----|----|----|-------|
| Month                         | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | Total |
| Total new customer enrollment | - | - | - | - | - | - | - | - | - | -  | -  | -  | -     |
| Total customer load (kWh)     | - | - | - | - | - | - | - | - | - | -  | -  | -  | -     |

| DAC-GT 2021                                    |   |        |         |         |         |         |         |         |           |           |           |           |           |
|--|---|--------|---------|---------|---------|---------|---------|---------|-----------|-----------|-----------|-----------|-----------|
| Month  | 1 | 2      | 3       | 4       | 5       | 6       | 7       | 8       | 9         | 10        | 11        | 12        | Total     |
| Total new customer enrollment                  | - | 175    | 300     | 350     | 400     | 450     | 400     | 400     | 400       | 375       | 350       | 300       | 3,900     |
| Total new customer load added this month (kWh) | - | 68,775 | 117,900 | 137,550 | 157,200 | 176,850 | 157,200 | 157,200 | 157,200   | 147,375   | 137,550   | 117,900   |           |
| Total cumulative customer load (kWh)           | - | 68,775 | 186,675 | 324,225 | 481,425 | 658,275 | 815,475 | 972,675 | 1,129,875 | 1,277,250 | 1,414,800 | 1,532,700 | 8,862,150 |

[illegible]



## 2021 and 2022 Above Market Generation Costs - CSGT

| Inputs  |             |  |      |  |
|---------|-------------|--|------|--|
| 39.42   | \$/MWh      | Energy Index Cost - ICE DA forwards SP15             |      |  |
| 6.00    | \$/MWh      | CF   | 0%   | Percent of "Clean" non-renewable portion         |
| 15.69   | \$/MWh      | PCC1 Cost  | 66%  | Percent of "Clean" renewable portion             |
| 10.5    | \$/MWh      | PCC2 Cost  | 13%  | Percent of "Clean" renewable portion             |
| 3.5     | \$/MWh      | PCC3 Cost  | 0%   | Percent of "Clean" renewable portion             |
| 46.64   | \$/MWh      | PPA Cost   | 100% | Percent of "Clean" renewable portion             |
| 16.00   | \$/MWh      | N/A CS-GT PCC1 Cost                                  | 0%   | N/A Percent of CS-GT portfolio renewable portion |
| 160.00  | \$/MWh      | CSGT PPA Cos   | 100% | Percent of CS-GT portfolio renewable portion     |
| 50%     |             | non-renewable portion of applicable CPA "Clean" rate |      |  |
| 50%     |             | renewable portion of applicable CPA "Clean" rate     |      |  |
| -       |             | kWh total program volume 2020                        |      |  |
| -       |             | kWh total program volume 2021                        |      |  |
| 328,500 |             | kWh total program volume 2022                        |      | (assumes 500kw project comes online 10/1/2022)   |
| 3.98    | \$/kWhmonth | RA Average   |      |  |
| 5.53    | \$/MWh      | RA Average   |      |  |
| 5.53    | \$/MWh      | N/A RA Average - for DAC PCC1s                       |      |  |
| 0.77    | \$/MWh      | RA Average Value for CSGT PPA                        |      |  |

|    |       |      |   |                                       |   |   |
|----|-------|------|---|---------------------------------------|---|---|
| \$ | 0.045 | /kwh | A | average non-renewable generation cost | = | Energy Index, Carbon Free, plus RA  |
| \$ | 0.057 | /kwh | B | renewable generation cost             | = | Weighted PCC1, PCC2, PCC3 Plus Energy and RA, and PPA value. Subtract out the R |
| \$ | 0.159 | /kwh | C | CS-GT program generation cost         | = | CS-GT PPA cost minus RA value   |

Volume kwh

|  | 2020 | 2021 | 2022    |                          |
|--|------|------|---------|--------------------------|
|  | -    | -    | 328,500 | kwh total volume         |
|  | -    | -    | 164,250 | kwh non-renewable volume |
|  | -    | -    | 164,250 | kwh renewable volume     |

Above market generation costs =

[(C-A)\*volume]+[(C-B)\*volume]

|    |       |      |     |   |
|----|-------|------|-----|---|
| \$ | 0.114 | /kwh | C-A | the additional cost per kwh of generation to procure DAC program renewable in place of the non-renewable we would otherwise have procured |
| \$ | 0.102 | /kwh | C-B | the additional cost per kwh of generation to procure DAC program renewable in place of the renewable we would otherwise have procured     |

Total above market costs per year

|    | 2020 | 2021 | 2022      |  |
|----|------|------|-----------|--|
| \$ | -    | \$ - | \$ 18,770 | (C-A)*volume total above market cost for non-renewable portion of generation |
| \$ | -    | \$ - | \$ 16,787 | (C-B)*volume total above market cost for renewable portion of generation     |
| \$ | -    | \$ - | \$ 35,557 | total above market costs   |

CSGT 2022

| Month  | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10      | 11      | 12      | Yr      |
|--|---|---|---|---|---|---|---|---|---|---------|---------|---------|---------|
| Total new customer enrollment                  | - | - | - | - | - | - | - | - | - | 278     | -       | -       | 278     |
| Total new customer load added this month (kWh) | - | - | - | - | - | - | - | - | - | 109,254 | -       | -       |         |
| Total cumulative customer load (kWh)           | - | - | - | - | - | - | - | - | - | 109,254 | 109,254 | 109,254 | 327,762 |

## 20 Percent Bill Discount

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## **Appendix B: Power Share Program Marketing and Communications Plan**

### **Power Share Program Marketing and Communications Plan**

February 1, 2021

#### **Overview**

In January 2020, Clean Power Alliance (CPA) will launch the Power Share program, an initiative that provides 20 percent bill discounts to eligible Disadvantaged Community (DAC) customers for subscribing to use clean, renewable energy sources. Funded by the California Public Utilities Commission (CPUC), this program is meant to advance energy equity by providing affordable access to clean energy in low-income communities. Because this program features local clean energy investments in the community, there is an opportunity to engage local elected officials and advocacy group leaders to promote this program to their communities. CPA will promote the initiative across all channels using earned, paid, and owned media.

#### **Program Objectives**

The Power Share (DAC-Green Tariff and Community Solar Green Tariff, collectively) program will provide low-income customers living in disadvantaged communities with access to locally generated, 100% renewable energy as well as a 20 percent discount on their power bills. CPA will achieve the following program objectives:

1. Ensure disadvantaged communities have equitable access to clean power by fully enrolling the DAC-Green Tariff (DAC-GT) program (estimated to be between 5,500-6,500 customers) enrolling 7,000 eligible customers in CPA's Power Share program by 2021.
2. Increase awareness about what CPA is and how we support the community with Power Share and with other programs.
3. Establish ongoing relationships with member agency communities and DAC communities.

#### **Strategies**

1. Conduct the first series of customer program/market research to identify barriers, identify activities that will likely boost participation, and refine the program/marketing prior to launch.
2. Target eligible communities with marketing and outreach to sign customers up on a first-come, first-served basis. Results will be monitored to ensure efforts are effective in reaching eligible communities.
3. Enhanced outreach and targeting to most vulnerable communities.
4. Build a collaborative process with CPA's Community Based Organization (CBO) partners to boost participation and address program barriers.
5. Engage board members, member agencies, and community groups to help promote Power Share to their constituencies.

#### **Target Audiences**

Our target audience is an estimated 182,000 CPA residential customer accounts in DACs:

- San Gabriel Valley (Alhambra, Temple City, Arcadia, Hacienda Heights, Rowland Heights)
- Oxnard/Ventura
- South Los Angeles (View Park, Watts/Willowbrook, Lennox, Athens)
- South Bay (Carson, West Carson, Hawthorne)
- Eastside (East LA, East Pasadena, Whittier, West Whittier, Downey)

These customers include:

- Renters
- Individually-metered residents of affordable housing complexes
- African American customers (4.19% of CPA customers)
- Latino customers (30.18% of CPA customers)
- Asian customers (15.21% of CPA customers)
- Monolingual speakers (including Spanish, Chinese, or Tagalog)

### **Key Messages**

- OVERARCHING MESSAGE such as – Power sharing is caring. New CPA program makes clean energy more affordable to low-income communities which otherwise may not have access to solar.
- CALL TO ACTION such as “20% discount available! To determine if you’re eligible and sign up, please visit [cleanpoweralliance.org/powershare](http://cleanpoweralliance.org/powershare) or call 888-585-3788.
- Economic benefits: Meaningful bill savings for customers, in addition to the CARE/FERA programs’ bill discount; no need to invest in equipment.
- Equity: Access to the economic benefits of clean energy for under-resourced communities.
- Environmental: Customers will benefit from local renewable energy, while helping lead the way to a greener future for all.
- Local pride: Clean energy projects can be located in customers’ neighborhoods.
- Thank you to partners at the CPUC for funding this program to support energy equity.

### **Campaign Launch: February 2021**

#### **Marketing Tactics**

##### *Market research*

CPA will conduct multilingual marketing research among low-income/DAC customers, the Community Advisory Committee, and CBO grantees to determine favored and intuitive messaging and graphics for the two Power Share programs. This will include input from focus groups in English, Spanish, and Mandarin to test processes and receive customer feedback on collateral and messaging prior to branding the programs. The input will aid in the development of collateral materials and ads. Research will also include customer surveys during and after each year of program enrollment. CPA will conduct an end-of-the-year marketing and outreach evaluation to determine ME&O effectiveness and ways to be more responsive in the following year to customer concerns.

#### *Direct mail to customers*

CPA will send targeted multilingual program mailers to select CARE/FERA/Medical Baseline enrolled customers located within DACs. Enrollments in these targeted areas (while verifying and referencing the list of customers who received the mailers) and call center calls or emails regarding the program (where they reference the mailers), will be tracked to assess the effectiveness of the messages and tailor future outreach. CPA will work with member agencies to disseminate co-branded mail and email to their contact lists and networks in DACs (e.g., via neighborhood councils).

#### *Direct emails to customers*

CPA will send targeted multilingual program emails to select CARE/FERA/Medical Baseline enrolled customers located within DACs. Email open rates and website click through rates (specifically from email notices), enrollments in these targeted areas (while verifying referencing the list of customers who received the emails), and call center calls about the program (where they reference the emails) will be tracked to assess the effectiveness of the messages and tailor future outreach. CPA will work with member agencies to disseminate co-branded content to their email newsletters and networks within DACs (e.g., via neighborhood councils).

#### *Ethnic Media Paid Advertisements*

CPA will launch robust paid media campaigns targeting prominent ethnic print and radio outlets in underserved communities, highlighting the program benefits and enrollment process. There will be several cycles of ads which tie in different seasonal or cultural messages (for example: Lunar New Year in early 2021 targeting Mandarin/Cantonese radio/print).

#### *Website*

CPA will create a dedicated webpage and enrollment form for the Power Share programs, in English, Spanish, and Chinese. This website will have information about CPA and link back to the CPA homepage to support increased branding awareness.

#### *Paid Search Campaign*

CPA will work with a marketing firm to identify key phrases and terms to target paid search ads.

#### *Social Media Campaigns*

CPA will conduct extensive and targeted social media paid campaigns targeting key Disadvantaged Communities (see “Target Audiences” section for complete list) by the appropriate language, encouraging enrollment by driving customers to our website. Channels will include Facebook and WeChat.

#### *Earned Media*

We will create press release and op-ed to place with ethnic/traditional news media and bloggers/influencers.

### *Print Materials*

CPA will create culturally appropriate, multilingual fact sheets, flyers and outreach kit materials targeting diverse segments of DAC dwelling residential customers. The materials will explain the program and enrollment process in brief, including the economic and environmental benefits of participation, while highlighting the call center and website. CBOs, CPA staff, and other stakeholders will disseminate the fliers.

### *Community-Based Organization (CBO) Outreach*

CPA's CBO grantees will build customer awareness and enrollment within the Power Share programs (and CARE/FERA programs) as the third and final portion of their annual scope of work. CBO grantees will receive training on the Power Share programs and outreach kits with culturally and linguistically appropriate collaterals and signage, as well as computer tablets for easy digital enrollment (if public health conditions permit).

### *CPA Member Agency Outreach*

CPA staff will publicize the Power Share programs at online events, presentations, and workshops in coordination with its member agencies and board members. CPA's Community Advisory Committee (CAC) will be given outreach kits and trained on how to do outreach and enrollment within their community networks.

CPA will adapt its Power Share materials, messaging, social media and website content and create communications kits for our member agencies and coordinate with their Public Information Officers to disseminate. The disseminated content can include city and board members' websites, newsletters, social media channels, and public television channels.

### **Campaign Metrics**

CPA will collect the following metrics for each applicable ME&O channel and will evaluate their effectiveness and areas for improvement in an end of the year analysis:

- Sign-ups
- Website visits and page views (by language)
- Email click-through and open rates (and subsequent program enrollment)
- Social media engagement (e.g., likes, followers, shares, re-tweets, click throughs to website)
- Number of media impressions
- Number of customers reached
- Outreach online event and workshop participation
- Call center mentions of ethnic media ad campaigns, mailers, CBO outreach/events, or social media/digital ads and data on requested languages by community
- Any increase in customers enrolling after marketing campaigns or CBO outreach, particularly by certain regions or monolingual populations
- Sign-up for newsletter, social media and other ongoing communication platforms
- Conversion rates from each marketing outlet

## Campaign Objectives

**Overall reach:** 125,808,606 individuals.

**Website reach**

**Social media follower increase**

**Eblast open/click rates increase** (40k eligible customers have emails)

**Spanish and Chinese speakers on social media reach**

**Social media ad reach**

**# of media hits:** 10-20 (3-5 Spanish print/tv, 3-5 Chinese print and Mandarin/Cantonese radio/tv, 5-10 in local (DAC) English/other ethnic media print/radio/tv, including African American and Filipino outlets)

Community Advisory Committee reach—how many customers they spoke with

**Increase in call center calls (by language about Power Share):** 45-50 English language, 5-15 Spanish language, and 2-5 Mandarin or Cantonese language calls/month (first quarter of the Program hard launch)

**Community outreach:** 15-20 presentations or webinars in 2021

**Customer surveys:** 30-65% of the total enrolled customer base of 7000 customers: 2100-4550

CPA's Proposed ME&O Budget for DAC-GT and CSGT for PY 2021 and PY 2022

| Category              | DAC-GT     |                  |                  | Total            | CSGT       |                  |                  |                  | Total              |
|-----------------------|------------|------------------|------------------|------------------|------------|------------------|------------------|------------------|--------------------|
|                       | 2020       | 2021             | 2022             |                  | 2020       | 2021             | 2022             | Total            |                    |
| Grassroots Marketing  | \$0        | \$95,000         | \$95,000         | \$190,000        | \$0        | \$95,000         | \$110,000        | \$205,000        | \$395,000          |
| Targeted Marketing    | \$0        | \$160,000        | \$140,000        | \$300,000        | \$0        | \$0              | \$175,000        | \$175,000        | \$475,000          |
| Broad-based Marketing | \$0        | \$132,000        | \$80,000         | \$212,000        | \$0        | \$88,000         | \$103,000        | \$191,000        | \$403,000          |
| Research              | \$0        | \$40,000         | \$40,000         | \$80,000         | \$0        | \$0              | \$0              | \$0              | \$80,000           |
| <b>Total</b>          | <b>\$0</b> | <b>\$427,000</b> | <b>\$355,000</b> | <b>\$782,000</b> | <b>\$0</b> | <b>\$183,000</b> | <b>\$388,000</b> | <b>\$571,000</b> | <b>\$1,353,000</b> |

Marketing team lead activity  
Programs team lead activity  
Interethnica lead activity

CBO grantees activity  
Place and Page activity

|                    |  | Power Share Marketing Campaign |   |   |   |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  |                   |                 |  |  |  |
|--------------------|--|--------------------------------|---|---|---|------|---|--|--|------|---|---|---|------|--|---|---|------|--|--|-------------------|-----------------|--|--|--|
| Type of Strategy   | Proposed Strategy  | Nov.                           |   |   |   | Dec. |   |  |  | Jan. |   |   |   | Feb. |  |   |   | Mar. |  |  |                   | Point Person(s) |  |  |  |
| Marketing Research | Name and message development   |                                |   |   |   |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  |                   |                 |  |  |  |
|                    | Online branding and message research   | █                              |   |   |   |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  |                   | AM/AG           |  |  |  |
|                    | Branding brainstorm team conversation  | █                              |   |   |   |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  |                   | AM/AG/KS/CC     |  |  |  |
|                    | Refine top list of names for TB/ML and get their input   | █                              |   |   |   |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  |                   | AM/AG           |  |  |  |
|                    | Finalize program name and messaging (w/all involved teammates' input)                            | █                              |   |   |   |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  |                   | AM/AG           |  |  |  |
|                    | Conduct Focus Groups   |                                |   |   |   |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  |                   |                 |  |  |  |
|                    | ID key objectives for focus group feedback/write English language focus group facilitator script | █                              | █ | █ |   |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  |                   | AM              |  |  |  |
|                    | Incorporate all team edits into facilitator script   | █                              | █ | █ |   |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  |                   | AM              |  |  |  |
|                    | Finalize contract w/Interethnica and send over English language script/materials                 |                                | █ |   |   |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  |                   | AM/Interethnica |  |  |  |
|                    | Develop multilingual flier/messaging for focus group recruitment                                 |                                |   | █ |   |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  |                   | AG              |  |  |  |
|                    | Recruit 15-20 customers for focus groups   |                                |   | █ | █ |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  |                   | Interethnica    |  |  |  |
|                    | Translate and adapt facilitator scripts into Chinese and Spanish                                 |                                |   | █ | █ |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  |                   | Interethnica    |  |  |  |
|                    | Go over final facilitator scripts and materials for each focus group                             |                                |   |   |   | █    | █ |  |  |      |   |   |   |      |  |   |   |      |  |  |                   | AG/Interethnica |  |  |  |
|                    | Facilitate 3 focus groups (English, Spanish, and Mandarin)                                       |                                |   |   |   |      |   |  |  | █    | █ | █ | █ |      |  |   |   |      |  |  |                   | Interethnica    |  |  |  |
|                    | Message refinement and analysis  |                                |   |   |   |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  |                   |                 |  |  |  |
|                    | Review facilitator notes+refine program name/messaging/collaterals                               |                                |   |   |   |      |   |  |  |      |   |   |   |      |  | █ | █ |      |  |  |                   | AG/SC           |  |  |  |
|                    | Get TB/ML/NW/CAC feedback on refined program name/messaging/materials                            |                                |   |   |   |      |   |  |  |      |   |   |   |      |  |   | █ |      |  |  |                   | AG/SC           |  |  |  |
|                    | Finalize messaging/materials   |                                |   |   |   |      |   |  |  |      |   |   |   |      |  |   | █ |      |  |  |                   | AG/SC           |  |  |  |
| Collaterals Design | Create Program Collaterals   |                                |   |   |   |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  |                   |                 |  |  |  |
|                    | Write copy for fliers + mailers  |                                |   |   |   |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  | AG                |                 |  |  |  |
|                    | Incorporate all team edits into collateral drafts  | █                              | █ |   |   |      |   |  |  |      |   |   |   |      |  |   |   |      |  |  | AG                |                 |  |  |  |
|                    | Translate copy for flier + mailer  |                                |   |   | █ | █    |   |  |  |      |   |   |   |      |  |   |   |      |  |  | Interethnica      |                 |  |  |  |
|                    | Send final English, Spanish, and Chinese copy for design   |                                |   |   |   | █    | █ |  |  |      |   |   |   |      |  |   |   |      |  |  | AG/Place and Page |                 |  |  |  |
|                    | Incorporate all team edits into designed collaterals   |                                |   |   |   |      | █ |  |  |      |   |   |   |      |  |   |   |      |  |  | AG                |                 |  |  |  |



|  |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |                   |
|--|---|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|-------------------|
|  | Finalize design for translated collateral and mailers for focus groups                |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG/Place and Page |
|  | Refine mailer and collaterals with focus group feedback                               |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG                |
|  | Incorporate all team edits into post-focus group designed collaterals                 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG                |
|  | Finalize collaterals  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG/Place and Page |
| Emails and Direct Mail Campaigns               | Send targeted customer mailers and emails   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |                   |
|  | Determine DAC customer targeting strategy   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | SC                |
|  | Pull DAC customer mailing and email lists (sorted by language/area)                   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AH                |
|  | Send finalized mailers to printer and mailhouse                                       |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG                |
|  | Draft and incorporate team feedback into DAC customer emails                          |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG                |
|  | Send mass customer email to DAC customers   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG                |
| Website Development and Social Media Campaigns | Develop/post website+social media content   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |                   |
|  | Website copy development  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG                |
|  | Incorporate all team edits into website copy  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG                |
|  | Website graphics development  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG/Place and Page |
|  | Social media copy development   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG                |
|  | Incorporate all team edits into social media copy                                     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG                |
|  | Social media creative content development   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG/Place and Page |
|  | Social media and website content translation  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | Interethnica      |
| CBO Engagement                                 | CBO Outreach + Enrollment   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |                   |
|  | Compiling social media content, a powerpoint, and a script for CBO training           |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG                |
|  | Incorporate all team edits into powerpoint, script, and social media content          |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | CC                |
|  | CBO Training for 2020 Grantees  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | CC                |
|  | CBO Outreach and Customer Enrollment  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | CBOs              |
| Paid Ethnic Media Ad Campaigns                 | Digital and radio ad campaigns  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |                   |
|  | ID top digital and radio outlets by language and match up against budget              |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG                |
|  | Write copy for digital and radio ads  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG                |
|  | Incorporate all team edits into digital and radio ads                                 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG                |
|  | Get finalized ad copy translated  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | Interethnica      |
|  | Design digital ads  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | Place and Page    |
|  | Incorporate all team edits into designed digital ads                                  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG                |
|  | Submit final digital ads to each publication  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG                |
|  | Submit final translated ads to Spanish and Mandarin/Cantonese language radio stations |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | AG                |