



ADVICE LETTER SUMMARY

ENERGY UTILITY

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

Company name/CPUC Utility No.: CleanPowerSF

Utility type:

- ELC GAS WATER
 PLC HEAT

Contact Person: Cheryl Taylor

Phone #: 415-934-3982

E-mail: ctaylor@sfwater.org

E-mail Disposition Notice to: ctaylor@sfwater.org

EXPLANATION OF UTILITY TYPE

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

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #: CleanPowerSF AL 25-E

Tier Designation: 2

Subject of AL: CalEnviroScreen Update to CleanPowerSF's Tariffs for the Disadvantaged Communities Green Tariff and Community Solar Green Tariff Programs

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 #: E-5212

Does AL replace a withdrawn or rejected AL?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

Summarize differences between the AL and the prior withdrawn or rejected AL: N/A

Confidential treatment requested? Yes No

If yes, specification of confidential information: N/A

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: N/A

Resolution required? Yes No

Requested effective date: 4/10/23

No. of tariff sheets: 8

Estimated system annual revenue effect (%): N/A

Estimated system average rate effect (%): N/A

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected: DAC-GT
CSGT

Service affected and changes proposed¹: Service List R.14-07-002; update eligibility to CalEnviroScreen v. 3.0, 4.0

Pending advice letters that revise the same tariff sheets:

¹Discuss in AL if more space is needed.

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

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

Name: Cheryl Taylor
Title: Operations Manager
Utility Name: San Francisco Public Utilities Commission
Address: 525 Golden Gate Avenue
City: San Francisco
State: California Zip: 94102
Telephone (xxx) xxx-xxxx: 415-934-3982
Facsimile (xxx) xxx-xxxx:
Email: ctaylor@sfwater.org

Name:
Title:
Utility Name:
Address:
City:
State: California 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
Curtable 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	

March 10, 2023

California Public Utilities Commission
Energy Division
Attention: Tariff Unit
505 Van Ness Avenue, 4th Floor
San Francisco, CA 94102
Email: EDTariffUnit@cpuc.ca.gov

**RE: CleanPowerSF Advice Letter 25-E
CalEnviroScreen Update to CleanPowerSF's Tariffs for the
Disadvantaged Communities Green Tariff and Community Solar
Green Tariff Programs**

PURPOSE

In accordance with California Public Utilities Commission ("Commission") Resolution E-5212 ("Resolution"), CleanPowerSF submits this Tier 2 Advice Letter ("AL") updating its Disadvantaged Communities Green Tariff ("DAC-GT") and Community Solar Green Tariff ("CSGT") programs to reflect "additivity" of CalEnviroScreen ("CES") 3.0 census tracts.

BACKGROUND

The Commission in Decision ("D.") 18-06-027, *Alternate Decision Adopting Alternatives to Promote Solar Distributed Generation in Disadvantaged Communities*, dated June 21, 2018 ("D.18-06-027"), established programs to increase the development and adoption of renewable energy in California's disadvantaged communities ("DACs"). For purposes of these programs, D.18-06-027 defined disadvantaged communities as the census tracts among the top 25 percent identified in the then-current version of the California Communities Environmental Health Screening Tool (CalEnviroScreen 3.0).¹ D.18-06-027 included 22 census tracts that did not have a CalEnviroScreen score, but are among the top five percent in the CalEnviroScreen Pollution Burden category as disadvantaged communities.² This definition of disadvantaged communities applied to both the DAC-GT and CSGT programs, which each provide eligible

¹ D.18-06-027, p. 96 (Conclusions of Law 3).

² *Id.*

CleanPowerSF is a program of the San Francisco Public Utilities Commission (SFPUC), an enterprise department of the City and County of San Francisco.

CleanPowerSF is committed to protecting customer privacy. Learn more at cleanpowersf.org/privacy.

OUR MISSION: To provide our customers with high-quality, efficient and reliable water, power and sewer services in a manner that values environmental and community interests and sustains the resources entrusted to our care.

London N. Breed
Mayor

Newsha K. Ajami
President

Sophie Maxwell
Vice President

Tim Paulson
Commissioner

Anthony Rivera
Commissioner

Kate H. Stacy
Commissioner

Dennis J. Herrera
General Manager



participating customers up to 100% renewable energy at a 20% total electric bill discount.

On May 30, 2019, the Commission adopted Resolution E-4999 authorizing Community Choice Aggregators (“CCAs”) to serve as program administrators for the DAC-GT and CSGT programs. Resolution E-4999 required CCAs to file Tier 3 implementation Advice Letter by January 1, 2021. As required, CleanPowerSF filed its implementation Advice Letter on December 31, 2020³ and received approval with modifications in Resolution E-5124 on April 15, 2021.⁴

Resolution E-4999 also instructed Investor-Owned Utilities (“IOUs”) to “update their DAC-GT and CSGT tariffs as soon as a new version of CalEnviroScreen was released by filing a Tier 1 Advice Letter within 30 days of the release of the new version.”⁵ The Resolution also required that participating CCAs abide by all program rules and requirements established in D.18-06-027.⁶

CalEnviroScreen 3.0 was developed by the Office of Environmental Health Hazard Assessment (“OEHHA”) on behalf of the California Environmental Protection Agency. On October 13, 2021, OEHHA finalized a new version of the tool -- CES 4.0 -- replacing CES 3.0. The updated version incorporated the most recent data available for all indicators, improved calculations of some indicators to better reflect environmental conditions and population vulnerability to pollution, and added a new indicator to reflect children’s risk of lead exposure to lead-based paint in low-income communities with older housing stock⁷. CleanPowerSF filed Tier 1 Advice Letter 19-E on November 9, 2021, updating its DAC-GT and CSGT to reference CES 4.0.

The net effect of the change from CES 3.0 to CES 4.0 on DAC-GT and CSGT programs is that some census tracts could no longer be included in the programs and some new census tracts gained eligibility. CES 3.0 was the version that was in place when each currently participating Program Administrator’s implementation plan was approved, including CleanPowerSF’s DAC-GT program. On April 15, 2021, when the Commission issued Resolution E-5124 approving CleanPowerSF’s Tier 2 AL-12E, fourteen census tracts were deemed CES 3.0 census tracts. When CES 4.0 superseded CES 3.0, six new census

³ CleanPowerSF Advice Letter 12-E, *Approve the Establishment and Implementation of Disadvantaged Communities Green Tariff Program and the Community Solar Green Tariff Program* (Dec. 31, 2020).

⁴ Resolution E-5124, p. 32 (Ordering Para 1).

⁵ Resolution E-4999, p. 64 (Ordering Para 1.p).

⁶ Resolution E-4999, pp. 53-54 (Findings and Conclusions Para. 12)

⁷ Summary of Changes in CalEnviroScreen Version 4.0, <https://oehha.ca.gov/media/downloads/calenviroscreen/document/calenviroscreen40summaryofchangesf2021.pdf>

tracts became eligible for DAC-GT and CSGT, but three census tracts were no longer eligible for inclusion in the Program. As a result, three additional census tracts are eligible for CleanPowerSF's DAC-GT and CSGT program.

Following Petitions for Modification of Resolution E-4999 from California Choice Energy Authority and East Bay Community Energy, the Commission issued Resolution E-5212 on October 11, 2022. Resolution E-5212 approved modifications to the DAC-GT and CSGT CES census tract eligibility to be additive starting from the time at which a Program Administrator's DAC-GT or CSGT implementation advice letter was approved. Resolution E-5212 also expanded eligibility to participate in DAC-GT and CSGT programs to all California Indian Country as defined in 18 United States Code Section 1151, with the exception of privately held in-holdings, which are defined as non-Indian owned fee land located within the exterior boundaries of California Indian Country; in the event of multiple owners, such land shall be considered Indian-owned if at least one owner is a tribe or tribal member, regardless of the use of the land.

DISCUSSION

Ordering Paragraph #4 of the Resolution E-5212 requires that DAC-GT and CSGT Program Administrators update their DAC-GT and CSGT tariffs, solicitation protocols, and marketing plans to reflect the latest program eligibility rules by filing a Tier 2 Advice Letter within 150 days of issuance of the Resolution. As required by the Resolution, CleanPowerSF hereby makes the following changes to its DAC-GT and CSGT tariffs:

Electric Schedule DAC-GT

CleanPowerSF changes "CalEnviroScreen 4.0" to "CalEnviroScreen 3.0 and CalEnviroScreen 4.0" in the following sections of its Schedule DAC-GT Tariff:

- I. Applicability

Electric Schedule CSGT

CleanPowerSF changes "CalEnviroScreen 4.0" to "CalEnviroScreen 3.0 and CalEnviroScreen 4.0" in the following sections of its Schedule CSGT Tariff:

- I.a. Residential Customer Eligibility

CleanPowerSF also takes this opportunity to update its enrollment process for the DAC-GT program. These changes are made to the Electric Schedule of the DAC-GT in II. Enrollment Terms.

The specific changes are attached as redlined pages as Appendix A. The complete, updated tariff sheets are included as Appendix B.

CleanPowerSF will separately file as a supplement to this Advice Letter, Appendix C, an updated pro forma Request for Offers to be used for procuring the DAC-GT and CSGT program resources.⁸ The DAC-GT program is currently served by an interim resource through December 31, 2026.

CleanPowerSF requests approval of these materials, attached to this AL as the following appendices:

- Appendix A: Schedule CleanPowerSF DAC-GT, *Disadvantaged Communities Green Tariff Program* and Schedule CleanPowerSF CSGT, *Community Solar Green Tariff Program* (revised and redlined);
- Appendix B: Schedule CleanPowerSF DAC-GT, *Disadvantaged Communities Green Tariff Program* and Schedule CleanPowerSF CSGT, *Community Solar Green Tariff Program* (updated);
- Appendix C: CleanPowerSF *Disadvantaged Communities Green Tariff Program* and CleanPowerSF *Community Solar Green Tariff Program* Request for Offers (*to be filed separately as a supplement to this advice letter*); and
- Appendix D: Marketing, Education and Outreach Plan for CleanPowerSF

TIER DESIGNATION

Pursuant to Resolution E-5212, this Advice Letter is submitted with a Tier 2 designation.

EFFECTIVE DATE

Pursuant to General Order 96-B, Energy Industry Rule 5.1, this Tier 2 Advice Letter is effective upon submittal.

PROTESTS

Anyone wishing to protest this Advice Letter may do so by sending a letter via U.S. Mail, facsimile, or electronically, any of which must be received no later than twenty (20) days after the date of this filing, March 30, 2023. Protests should be submitted to:

⁸ At the time of filing this Advice Letter, the pro forma Request for Offers required additional internal review, therefore CleanPowerSF, after confirming with Energy Division Staff, elects to file Appendix C as a supplement to this advice letter.

California Public Utilities Commission
Attention: Energy Division Tariff Unit
505 Van Ness Avenue, 4th Floor
San Francisco, CA 94102
Facsimile: 415-703-2200
Email: EDTariffUnit@cpuc.ca.gov

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

The protest should also be sent to CleanPowerSF on the same date it is
submitted to the California Public Utilities Commission:

Cheryl Taylor
Operations Manager, CleanPowerSF
San Francisco Public Utilities Commission
525 Golden Gate Avenue, 7th Floor
San Francisco, CA 94102
Email: ctaylor@sfgwater.org
Facsimile: 415-934-3982

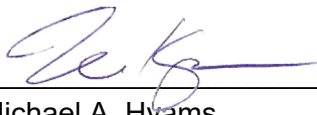
NOTICE

A copy of this Advice Letter is being served on the official Service List for
Rulemaking 14-07-002.

For changes to this Service List, please contact the Commission's Process
Office at 415-703-20021 or by electronic mail at Process_Office@cpuc.ca.gov.

CONCLUSION

CleanPowerSF looks forward to further implementing its DAC-GT and CSGT
programs, adding census tracts eligible under CalEnviroScreen version 3.0 to
the census tracts eligible under version 4.0.



Michael A. Hyams
Director, CleanPowerSF
San Francisco Public Utilities Commission
525 Golden Gate Avenue, 7th Floor
San Francisco, CA 94102
Email: MHyams@sfgwater.org

cc: Service List R.14-07-002

APPENDIX A – AL 25E

Electric Schedule DAC-GT, CleanPowerSF Disadvantaged Communities Green Tariff Program and CSGT, CleanPowerSF Community Solar Green Tariff Program (redlined)



Services of the San Francisco
Public Utilities Commission



ELECTRIC SCHEDULE DAC-GT

CleanPowerSF DISADVANTAGED COMMUNITIES GREEN TARIFF PROGRAM

I. Applicability

The CleanPowerSF Disadvantaged Communities Green Tariff (“DAC-GT”) is a voluntary rate supplement to the customer’s otherwise applicable rate schedule (“OAS”) under which eligible customers have their electricity usage met with up to 100% solar energy based on their annual usage while also receiving a 20% discount on their OAS.

To enroll under the rate, a customer must meet the following eligibility requirements:

- Customer must receive electric generation service from CleanPowerSF;
- Customer must be on a residential rate;
- Customer must meet the income eligibility requirements for the California Alternate Rates for Energy (“CARE”) or Family Electric Rate Assistance (“FERA”) programs;
- Customer’s service address must be located in a disadvantaged community (“DAC”) served by CleanPowerSF. ~~The CPUC defines eligible DACs as census tracts:~~
 - Scoring in the top 25 percent statewide in the version of communities that are identified in the CalEnviroScreen 4.0 tool in effect when a Program Administrator’s implementation plan was approved by the Commission and all subsequent versions;¹ as among the top 25% of census tracts statewide
 - Located, ~~plus the census tracts~~ in the highest 5% of CalEnviroScreen’s Pollution Burden that do not have an overall CalEnviroScreen score because of unreliable socioeconomic or health data;² or
 - Located in California Indian Country as defined in 18 United States Code Section 1151, with the exception of privately held in-holdings, which are defined as non-Indian owned fee land located within the exterior boundaries of California Indian Country; in the event of multiple owners, such land shall be considered Indian owned if at least one owner is a tribe or tribal member, regardless of the use of the land.³
- In the event that the CalEnviroScreen tool is updated, enrolled customers will retain their eligibility pursuant to the additive methodology adopted in Resolution E-5212, even if their census tract no longer qualifies as an eligible DAC.⁴

Service accounts enrolled under the following programs, services or rates are ineligible to enroll in the CleanPowerSF’s DAC-GT rate:

- IOU bundled service;
- Direct Aaccess service;
- Standby service;
- Net energy metering (“NEM”) rates;
- Non-metered service;
- Rates that are not CARE- or FERA-eligible;
- Non-residential rates;

¹ See Decision (“D.”) 18-06-027 at 96 (Conclusion of Law 3).

² Id.

³ See Res. E-5212 at Ordering Paragraph 4.

⁴ See Id. at Ordering Paragraph 2.

- Master-metered customers; and
- Customers enrolled in CleanPowerSF's Community Solar Green Tariff ("CSGT") rate schedule.

Eligibility of customers is verified at the level of the Service Agreement ID ("SAID").

II. Enrollment Terms

Enrollment of customers under Schedule CleanPowerSF DAC-GT occurs at the level of the SAID. Customer enrollment is capped at a maximum of 2 MW solar equivalent per SAID. This limitation does not apply to a federal, state, or local government, school or school district, county office of education, the California Community Colleges, the California State University, or the University of California.

Customers subscribe to a percentage of their community solar project's capacity based on their previous 12-month average monthly usage. This percentage allocation is set at the time of customer subscription but may be revisited periodically to ensure accurate allocations of project energy produced.

~~San Francisco CleanPowerSF intends to has commenced~~ auto-enrolling eligible customers participating in the Arrearage Management Program ("AMP") into the CleanPowerSF DAC-GT program. ~~Concurrent with AMP auto-enrollment, Upon completing auto-enrollment of eligible AMP customers, San Francisco CleanPowerSF also intends to use any remaining program capacity to enroll~~ eligible customers on a voluntary, or opt-in basis. ~~Depending on remaining capacity, CleanPowerSF intends to complete customer enrollment via randomized lottery on an opt-out basis.~~

Upon confirmation of eligibility, the customer will be placed on the DAC-GT rate on the first day of the next billing cycle where the start date occurs at least 5 business days after the date that ~~San Francisco CleanPowerSF~~ determines the customer's eligibility for enrollment. A customer request for service under the CleanPowerSF DAC-GT that is received less than 5 business days before the customer's next billing cycle may result in the customer being placed on the CleanPowerSF DAC-GT rate on the following billing cycle.

A participating customer may remain on the CleanPowerSF DAC-GT tariff for up to 20 years from the time of enrollment or until ~~San Francisco CleanPowerSF~~ no longer has eligible resources under contract, whichever comes first⁵. There is no contract required when enrolling in the CleanPowerSF DAC-GT program. There is no minimum enrollment commitment required and there is no cancellation fee. After a cancellation request is made, cancellation of a customer's participation will become effective on the next meter read date; cancellations made within five (5) business days of the next meter read date may not be changed until the following billing cycle.

If a customer moves its service address to another location within CleanPowerSF's service territory, they will need to reestablish their eligibility for the program. If the customer is found to

⁵ This expiration applies to the CPUC-funded DAC Solar programs only, ~~San Francisco CleanPowerSF~~ may continue offering comparable programs beyond the 20-year timeframe.

still be eligible, ~~San Francisco~~CleanPowerSF will add the customer to the program if capacity allows or add them to the end of the waitlist. ~~San Francisco~~CleanPowerSF will review the waitlist on a monthly basis and add customers as capacity allows. Customers who, after enrollment into the CleanPowerSF DAC-GT program, become ineligible for CARE or FERA will be removed from the CleanPowerSF DAC-GT program.

III. Rates

Customers taking service on this rate schedule will receive a 20% discount on the electric portion of their bill compared to their otherwise applicable rate schedule or OAS. The OAS is the customer's existing rate. For example, if the customer is currently enrolled in either the CARE or FERA discount programs, the 20% discount will be applied to bills after the normal CARE/FERA discount has been applied. The 20% discount applies as long customers are enrolled under the CleanPowerSF DAC-GT program and continue to meet all of the eligibility and enrollment terms.

Residential customer SAIDs that are enrolled in CleanPowerSF's other 100% renewable energy generation service option (i.e. CleanPowerSF's "SuperGreen" product) when enrolling under the CleanPowerSF DAC-GT program will be switched to CleanPowerSF's base product (i.e. CleanPowerSF's "Green" product) for the purposes of calculating the 20% discount.

IV. Billing

Monthly bills are calculated in accordance with the customer's OAS and the provisions contained herein. The amount credited under Schedule CleanPowerSF DAC-GT is provided by both PG&E and CleanPowerSF: ~~San Francisco~~CleanPowerSF calculates the 20% discount for the generation portion of the electric bill and PG&E calculates the 20% discount for the delivery portion of the electric bill.

Both entities display the discount on their respective portion of the customer's utility bill.

V. Metering

All customers must be metered according to the requirement of their OAS.

ELECTRIC SCHEDULE CSGT

CleanPowerSF COMMUNITY SOLAR GREEN TARIFF PROGRAM

I. Applicability

The CleanPowerSF Community Solar Green Tariff (“CSGT”) is a voluntary rate supplement to the customer’s otherwise applicable rate schedule (“OAS”) under which eligible customers have their electricity usage met with up to 100% solar energy based on their annual usage while also receiving a 20% discount on their OAS.

a. Residential Customer Eligibility

To enroll under the rate, a customer must meet the following eligibility requirements:

- Customer must receive electric generation service from CleanPowerSF;
- Customer must be on a residential rate, except for the project sponsor;
- Customer must meet the income eligibility requirements for the California Alternate Rates for Energy (“CARE”) or Family Electric Rate Assistance (“FERA”) programs, or customer must wait to enroll until at least fifty percent of the project’s capacity is utilized by low-income customers;
- Customer’s service address must be located in a disadvantaged community (“DAC”) served by CleanPowerSF. The CPUC defines eligible DACs are defined as communities census tracts:

 - Scoring in the top 25 percent statewide in the version of that are identified in the CalEnviroScreen 4.0 tool in effect when a Program Administrator’s implementation plan was approved by the Commission and all subsequent versions;⁶
 - Located in as among the top 25% of census tracts statewide, plus the census tracts in the highest 5% of CalEnviroScreen’s Pollution Burden that do not have an overall CalEnviroScreen score because of unreliable socioeconomic or health data;⁷ or
 - Located in California Indian Country as defined in 18 United States Code Section 1151, with the exception of privately held in-holdings, which are defined as non-Indian owned fee land located within the exterior boundaries of California Indian Country; in the event of multiple owners, such land shall be considered Indian owned if at least one owner is a tribe or tribal member, regardless of the use of the land.⁸

- In the event that the CalEnviroScreen tool is updated, enrolled customers will retain their eligibility pursuant to the additive methodology adopted in Resolution E-5212, even if their census tract no longer qualifies as a DAC.⁹ This grandfathered eligibility will apply to both existing subscribers and customers not previously subscribed to the project in the same DAC, to ensure that the project’s output can be fully subscribed by customers whose census tract is within 5-miles of the project;

⁶ See Decision (“D.”) 18-06-027 at 96 (Conclusion of Law 3).

⁷ *Id.*

⁸ See Res. E-5212, Ordering Paragraph 4.

⁹ See *Id.* at Ordering Paragraph 2.

- The solar generation project to which a customer subscribes must be located within five miles of the participating customer's census tract.

Service accounts enrolled under the following programs, services, and rates are ineligible to enroll in the CleanPowerSF CSGT rate:

- IOU bundled service;
- Direct [Access service](#);
- Standby service;
- Net energy metering ("NEM") rates;
- Non-metered service;
- Non-residential rates (except for the program sponsor); and
- Customers enrolled in the CleanPowerSF Disadvantaged Communities Green Tariff ("DAC-GT") rate schedule.

Master-metered customers may participate in the CleanPowerSF CSGT program as long as the master-metered account holder enrolls all usage under the master-metered account in the program. Individual tenants of a master-meter customer are not eligible to participate on an individual basis. Master-metered customers must also meet all other eligibility requirements. The eligibility of customers is verified at the level of the Service Agreement ID ("SAID").

b. Sponsor Eligibility

A non-profit community-based organization ("CBO") may "sponsor" a community solar project on behalf of residents, and in doing so also receive a 20% discount on eligible SAIDs. To "sponsor" a community solar project, the eligible organization must first demonstrate its community involvement. The sponsor's role is to work with the project developer to encourage program participation in its community.

To receive the 20% discount on eligible SAIDs as described below, the sponsor must fulfill the following requirements:

1. The sponsor must be a CleanPowerSF electric customer;
2. The sponsor must take service on the CleanPowerSF Community Solar Green Tariff;
3. The sponsor must be located within a disadvantaged community served by CleanPowerSF and within five miles of the solar project;¹⁰ and
4. The sponsor must meet all other eligibility requirements of any participating customer as described in the section on CleanPowerSF CSGT customer eligibility above, including ensuring that its rate schedule is not ineligible.

A sponsor that does not fulfill each of the requirements above may still become a project sponsor, however, they are not eligible to receive the 20% discount.

There may be more than one sponsoring entity supporting a single community solar project. Multiple sponsors may share the 20% discount as long as all sponsors meet the eligibility

¹⁰ D.18-06-027, p.78

requirements outlined above. A sponsor may also be (although is not required to be) a project site host.¹¹

II. Enrollment Terms

a. Residential Customer Eligibility

Enrollment of customers under Schedule CleanPowerSF CSGT occurs at the level of the SAID. Customer enrollment is capped at a maximum of 2 MW solar equivalent per SAID. This limitation does not apply to a federal, state, or local government, school or school district, county office of education, the California Community Colleges, the California State University, or the University of California.

Customers subscribe to a percentage of their community solar project's capacity based on their previous 12-month average monthly usage. This percentage allocation is set at the time of customer subscription but may be revisited periodically to ensure accurate allocations of project energy produced. Customers cannot be subscribed to more than one community solar project.

Eligible low-income customers may enroll under the rate on a first-come, first-serve basis. Once 50% of project capacity is subscribed by low-income customers, non-low-income qualified customers located in DACs will become eligible for enrollment on a first-come, first-served basis until customer subscriptions reach the CleanPowerSF CSGT program cap. Once the program cap is reached, a waitlist will be maintained for new subscriptions. When program capacity becomes available, ~~San Francisco CleanPowerSF~~ will continue enrolling eligible customers either from the waitlist (if applicable), or on a first-come, first-served basis up to the program cap. Non-low-income customers can be recruited before the 50% subscription requirement for low-income customers is met. However, the non-low-income customers will be placed on a waitlist until 50% of the project capacity is subscribed by low-income customers. If the low-income subscription rate drops below 50% over the life of the project, existing non-low-income customers are not required to go back on a waitlist, but new enrollments of non-low-income program participants will be suspended until the 50% low-income threshold is met again. During this time, new enrollments of non-low-income participants will be put on a waitlist until the 50% threshold is met.

Upon confirmation of eligibility, ~~San Francisco CleanPowerSF~~ will place the customer on ~~its~~the CleanPowerSF CSGT rate on the first day of the next billing cycle where the billing cycle start date occurs at least 5 business days after the date ~~San Francisco CleanPowerSF~~ determines the customer's eligibility for enrollment. A customer request for service under the CleanPowerSF CSGT rate that is received less than 5 business days before the customer's next billing cycle may result in the customer being placed on the CleanPowerSF CSGT rate for the following billing cycle.

A participating customer may remain on the CleanPowerSF CSGT tariff for the duration of the solar project's contract term, or up to 20 years, whichever is less.¹² There is no contract or minimum commitment required when a customer enrolls in the CleanPowerSF CSGT program

¹¹ For the purposes of this program, the concept of a "host" only refers to a customer site where the project is located. The community solar project must be located in-front-of-the-meter, even if located at a customer host site.

¹² This expiration applies to the CPUC-funded DAC Solar programs only, ~~San Francisco CleanPowerSF~~ may continue offering comparable programs beyond the 20-year timeframe.

and there are no fees for enrollment or cancellation. Cancellation of a customer's participation will become effective on the next meter read date after a cancellation request is made; cancellations made less than five (5) business days of the next meter read date may not be changed for an additional billing cycle. Customer participation in the CPUC-funded program will automatically terminate should the power supply agreement between CleanPowerSF and the CSGT project to which the customer is subscribed be terminated or the delivery term ends.

If a customer moves within CleanPowerSF service territory, they will need to reestablish their eligibility for the program. If the customer is found to still be eligible, ~~San Francisco~~ CleanPowerSF will add the customer to the program if capacity allows or add them to the end of the waitlist. ~~San Francisco~~ CleanPowerSF will review the waitlist on a monthly basis and add customers as CleanPowerSF CSGT project capacity allows.

b. Sponsor Enrollment

A sponsor of a CleanPowerSF CSGT project is subject to the same enrollment rules and requirements as described above for residential customers with one modification. A sponsor's subscription allocation is limited to a maximum of 25% of the project's energy output, not to exceed the sponsor's energy needs. The same principle applies if multiple sponsors share the 20% discount. If two or more sponsors are designated, the sponsors will need to inform ~~San Francisco~~ CleanPowerSF in writing how to allocate the "discountable usage" between them.

III. Rates

a. Residential Customer Rates

Customers taking service on this rate schedule will receive a 20% discount on the electric portion of their bill compared to their otherwise applicable rate schedule or OAS. The discount applies as long as the customer is enrolled under the program and complies with all of the eligibility and enrollment terms.

For low-income customers, the OAS is the customer's existing CARE or FERA rate. Accordingly, the 20% discount will be applied to bills after the CARE/FERA discount has been applied. The discount applies as long as customers are enrolled under the program and comply with all of the eligibility and enrollment terms.

For customers who are not enrolled in CARE or FERA, the OAS is the customer's existing rate schedule before program enrollment. Residential customer SAIDs that are already enrolled in CleanPowerSF's other 100% renewable energy generation service option (i.e. CleanPowerSF's "SuperGreen" product) will be switched to CleanPowerSF's base product (i.e. CleanPowerSF's "Green" product) for the purposes of calculating the 20% discount when enrolling under the program.

b. Sponsor Rates

A CleanPowerSF CSGT project sponsor who meets all of the eligibility requirements outlined above receives a 20% bill discount on its enrolled account. The sponsor bill discount will be calculated based on the same methodology as described above for residential program participants with one modification. The sponsor bill discount is only applied to a sponsor's subscription allocation, i.e. limited to a maximum of 25% of the project's energy output, not to exceed the sponsor's energy needs under the enrolled SAID. The discount applies as long as

sponsors are enrolled under the programs and they comply with all the sponsor eligibility and enrollment terms described above.

If two or more sponsors are designated, both sponsors must inform ~~San Francisco~~CleanPowerSF in writing of how the “discountable usage”, capped at 25% of the project’s energy output is to be allocated among them. ~~San Francisco~~CleanPowerSF will then calculate the applicable discount to each sponsor accordingly.

The sponsor’s discount is available to sponsors only after the community solar project has reached its required minimum 50% low-income subscription rate. If the subscription rate of low-income customers drops under 50% of project capacity at any time throughout the life of the project, the sponsor bill credit will not be revoked.

IV. Billing

Monthly bills are calculated in accordance with the customer’s OAS and the provisions contained herein. The amount credited under Schedule CleanPowerSF CSGT is provided by both PG&E and ~~San Francisco~~CleanPowerSF: ~~San Francisco~~CleanPowerSF- calculates the 20% discount for the generation portion of the electric bill and PG&E calculates the 20% discount for the delivery portion of the electric bill.

Both entities display the discount on their respective portion of the customer’s utility bill.

V. Metering

All customers must be metered according to the requirement of their OAS.

APPENDIX B – AL 25E

Electric Schedule DAC-GT, CleanPowerSF Disadvantaged Communities Green Tariff Program and CSGT, CleanPowerSF Community Solar Green Tariff Program (updated)



Services of the San Francisco
Public Utilities Commission



ELECTRIC SCHEDULE DAC-GT

CleanPowerSF DISADVANTAGED COMMUNITIES GREEN TARIFF PROGRAM

I. Applicability

The CleanPowerSF Disadvantaged Communities Green Tariff (“DAC-GT”) is a voluntary rate supplement to the customer’s otherwise applicable rate schedule (“OAS”) under which eligible customers have their electricity usage met with up to 100% solar energy based on their annual usage while also receiving a 20% discount on their OAS.

To enroll under the rate, a customer must meet the following eligibility requirements:

- Customer must receive electric generation service from CleanPowerSF;
- Customer must be on a residential rate;
- Customer must meet the income eligibility requirements for the California Alternate Rates for Energy (“CARE”) or Family Electric Rate Assistance (“FERA”) programs;
- Customer’s service address must be located in a disadvantaged community (“DAC”) served by CleanPowerSF. The CPUC defines eligible DACs as census tracts:
 - Scoring in the top 25 percent statewide in the version of the CalEnviroScreen tool in effect when a Program Administrator’s implementation plan was approved by the Commission and all subsequent versions;¹
 - Located in the highest 5% of CalEnviroScreen’s Pollution Burden that do not have an overall CalEnviroScreen score because of unreliable socioeconomic or health data;² or
 - Located in California Indian Country as defined in 18 United States Code Section 1151, with the exception of privately held in-holdings, which are defined as non-Indian owned fee land located within the exterior boundaries of California Indian Country; in the event of multiple owners, such land shall be considered Indian owned if at least one owner is a tribe or tribal member, regardless of the use of the land.³
- In the event that the CalEnviroScreen tool is updated, enrolled customers will retain their eligibility pursuant to the additive methodology adopted in Resolution E-5212, even if their census tract no longer qualifies as an eligible DAC.⁴

Service accounts enrolled under the following programs, services or rates are ineligible to enroll in the CleanPowerSF’s DAC-GT rate:

- IOU bundled service;
- Direct Access service;
- Standby service;
- Net energy metering (“NEM”) rates;
- Non-metered service;
- Rates that are not CARE- or FERA-eligible;
- Non-residential rates;
- Master-metered customers; and

¹ See Decision (“D.”) 18-06-027 at 96 (Conclusion of Law 3).

² *Id.*

³ See Res. E-5212 at Ordering Paragraph 4.

⁴ See *Id.* at Ordering Paragraph 2.

- Customers enrolled in CleanPowerSF's Community Solar Green Tariff ("CSGT") rate schedule.

Eligibility of customers is verified at the level of the Service Agreement ID ("SAID").

II. Enrollment Terms

Enrollment of customers under Schedule CleanPowerSF DAC-GT occurs at the level of the SAID. Customer enrollment is capped at a maximum of 2 MW solar equivalent per SAID. This limitation does not apply to a federal, state, or local government, school or school district, county office of education, the California Community Colleges, the California State University, or the University of California.

Customers subscribe to a percentage of their community solar project's capacity based on their previous 12-month average monthly usage. This percentage allocation is set at the time of customer subscription but may be revisited periodically to ensure accurate allocations of project energy produced.

CleanPowerSF has commenced auto-enrolling eligible customers participating in the Arrearage Management Program ("AMP") into the CleanPowerSF DAC-GT program. Concurrent with AMP auto-enrollment, CleanPowerSF also enrolls eligible customers on a voluntary, or opt-in basis. Depending on remaining capacity, CleanPowerSF intends to complete customer enrollment via randomized lottery on an opt-out basis.

Upon confirmation of eligibility, the customer will be placed on the DAC-GT rate on the first day of the next billing cycle where the start date occurs at least 5 business days after the date that CleanPowerSF determines the customer's eligibility for enrollment. A customer request for service under the CleanPowerSF DAC-GT that is received less than 5 business days before the customer's next billing cycle may result in the customer being placed on the CleanPowerSF DAC-GT rate on the following billing cycle.

A participating customer may remain on the CleanPowerSF DAC-GT tariff for up to 20 years from the time of enrollment or until CleanPowerSF no longer has eligible resources under contract, whichever comes first⁵. There is no contract required when enrolling in the CleanPowerSF DAC-GT program. There is no minimum enrollment commitment required and there is no cancellation fee. After a cancellation request is made, cancellation of a customer's participation will become effective on the next meter read date; cancellations made within five (5) business days of the next meter read date may not be changed until the following billing cycle.

If a customer moves its service address to another location within CleanPowerSF's service territory, they will need to reestablish their eligibility for the program. If the customer is found to still be eligible, CleanPowerSF will add the customer to the program if capacity allows or add them to the end of the waitlist. CleanPowerSF will review the waitlist on a monthly basis and add customers as capacity allows. Customers who, after enrollment into the CleanPowerSF DAC-GT

⁵ This expiration applies to the CPUC-funded DAC Solar programs only, CleanPowerSF may continue offering comparable programs beyond the 20-year timeframe.

program, become ineligible for CARE or FERA will be removed from the CleanPowerSF DAC-GT program.

III. Rates

Customers taking service on this rate schedule will receive a 20% discount on the electric portion of their bill compared to their otherwise applicable rate schedule or OAS. The OAS is the customer's existing rate. For example, if the customer is currently enrolled in either the CARE or FERA discount programs, the 20% discount will be applied to bills after the normal CARE/FERA discount has been applied. The 20% discount applies as long customers are enrolled under the CleanPowerSF DAC-GT program and continue to meet all of the eligibility and enrollment terms.

Residential customer SAIDs that are enrolled in CleanPowerSF's other 100% renewable energy generation service option (i.e. CleanPowerSF's "SuperGreen" product) when enrolling under the CleanPowerSF DAC-GT program will be switched to CleanPowerSF's base product (i.e. CleanPowerSF's "Green" product) for the purposes of calculating the 20% discount.

IV. Billing

Monthly bills are calculated in accordance with the customer's OAS and the provisions contained herein. The amount credited under Schedule CleanPowerSF DAC-GT is provided by both PG&E and CleanPowerSF: CleanPowerSF calculates the 20% discount for the generation portion of the electric bill and PG&E calculates the 20% discount for the delivery portion of the electric bill.

Both entities display the discount on their respective portion of the customer's utility bill.

V. Metering

All customers must be metered according to the requirement of their OAS.

ELECTRIC SCHEDULE CSGT

CleanPowerSF COMMUNITY SOLAR GREEN TARIFF PROGRAM

I. Applicability

The CleanPowerSF Community Solar Green Tariff (“CSGT”) is a voluntary rate supplement to the customer’s otherwise applicable rate schedule (“OAS”) under which eligible customers have their electricity usage met with up to 100% solar energy based on their annual usage while also receiving a 20% discount on their OAS.

a. Residential Customer Eligibility

To enroll under the rate, a customer must meet the following eligibility requirements:

- Customer must receive electric generation service from CleanPowerSF;
- Customer must be on a residential rate, except for the project sponsor;
- Customer must meet the income eligibility requirements for the California Alternate Rates for Energy (“CARE”) or Family Electric Rate Assistance (“FERA”) programs, or customer must wait to enroll until at least fifty percent of the project’s capacity is utilized by low-income customers;
- Customer’s service address must be located in a disadvantaged community (“DAC”) served by CleanPowerSF. The CPUC defines eligible DACs as census tracts:
 - Scoring in the top 25 percent statewide in the version of the CalEnviroScreen tool in effect when a Program Administrator’s implementation plan was approved by the Commission and all subsequent versions;⁶
 - Located in in the highest 5% of CalEnviroScreen’s Pollution Burden that do not have an overall CalEnviroScreen score because of unreliable socioeconomic or health data;⁷ or
 - Located in California Indian Country as defined in 18 United States Code Section 1151, with the exception of privately held in-holdings, which are defined as non-Indian owned fee land located within the exterior boundaries of California Indian Country; in the event of multiple owners, such land shall be considered Indian owned if at least one owner is a tribe or tribal member, regardless of the use of the land.⁸
- In the event that the CalEnviroScreen tool is updated, enrolled customers will retain their eligibility pursuant to the additive methodology adopted in Resolution E-5212, even if their census tract no longer qualifies as a DAC.⁹ This grandfathered eligibility will apply to both existing subscribers and customers not previously subscribed to the project in the same DAC, to ensure that the project’s output can be fully subscribed by customers whose census tract is within 5-miles of the project;
- The solar generation project to which a customer subscribes must be located within five miles of the participating customer’s census tract.

⁶ See Decision (“D.”) 18-06-027 at 96 (Conclusion of Law 3).

⁷ *Id.*

⁸ See Res. E-5212, Ordering Paragraph 4.

⁹ See *Id.* at Ordering Paragraph 2.

Service accounts enrolled under the following programs, services, and rates are ineligible to enroll in the CleanPowerSF CSGT rate:

- IOU bundled service;
- Direct Access service;
- Standby service;
- Net energy metering (“NEM”) rates;
- Non-metered service;
- Non-residential rates (except for the program sponsor); and
- Customers enrolled in the CleanPowerSF Disadvantaged Communities Green Tariff (“DAC-GT”) rate schedule.

Master-metered customers may participate in the CleanPowerSF CSGT program as long as the master-metered account holder enrolls all usage under the master-metered account in the program. Individual tenants of a master-meter customer are not eligible to participate on an individual basis. Master-metered customers must also meet all other eligibility requirements. The eligibility of customers is verified at the level of the Service Agreement ID (“SAID”).

b. Sponsor Eligibility

A non-profit community-based organization (“CBO”) may “sponsor” a community solar project on behalf of residents, and in doing so also receive a 20% discount on eligible SAIDs. To “sponsor” a community solar project, the eligible organization must first demonstrate its community involvement. The sponsor’s role is to work with the project developer to encourage program participation in its community.

To receive the 20% discount on eligible SAIDs as described below, the sponsor must fulfill the following requirements:

1. The sponsor must be a CleanPowerSF electric customer;
2. The sponsor must take service on the CleanPowerSF Community Solar Green Tariff;
3. The sponsor must be located within a disadvantaged community served by CleanPowerSF and within five miles of the solar project;¹⁰ and
4. The sponsor must meet all other eligibility requirements of any participating customer as described in the section on CleanPowerSF CSGT customer eligibility above, including ensuring that its rate schedule is not ineligible.

A sponsor that does not fulfill each of the requirements above may still become a project sponsor, however, they are not eligible to receive the 20% discount.

There may be more than one sponsoring entity supporting a single community solar project. Multiple sponsors may share the 20% discount as long as all sponsors meet the eligibility

¹⁰ D.18-06-027, p.78

requirements outlined above. A sponsor may also be (although is not required to be) a project site host.¹¹

II. Enrollment Terms

a. Residential Customer Eligibility

Enrollment of customers under Schedule CleanPowerSF CSGT occurs at the level of the SAID. Customer enrollment is capped at a maximum of 2 MW solar equivalent per SAID. This limitation does not apply to a federal, state, or local government, school or school district, county office of education, the California Community Colleges, the California State University, or the University of California.

Customers subscribe to a percentage of their community solar project's capacity based on their previous 12-month average monthly usage. This percentage allocation is set at the time of customer subscription but may be revisited periodically to ensure accurate allocations of project energy produced. Customers cannot be subscribed to more than one community solar project.

Eligible low-income customers may enroll under the rate on a first-come, first-serve basis. Once 50% of project capacity is subscribed by low-income customers, non-low-income qualified customers located in DACs will become eligible for enrollment on a first-come, first-served basis until customer subscriptions reach the CleanPowerSF CSGT program cap. Once the program cap is reached, a waitlist will be maintained for new subscriptions. When program capacity becomes available, CleanPowerSF will continue enrolling eligible customers either from the waitlist (if applicable), or on a first-come, first-served basis up to the program cap. Non-low-income customers can be recruited before the 50% subscription requirement for low-income customers is met. However, the non-low-income customers will be placed on a waitlist until 50% of the project capacity is subscribed by low-income customers. If the low-income subscription rate drops below 50% over the life of the project, existing non-low-income customers are not required to go back on a waitlist, but new enrollments of non-low-income program participants will be suspended until the 50% low-income threshold is met again. During this time, new enrollments of non-low-income participants will be put on a waitlist until the 50% threshold is met.

Upon confirmation of eligibility, CleanPowerSF will place the customer on its CSGT rate on the first day of the next billing cycle where the billing cycle start date occurs at least 5 business days after the date CleanPowerSF determines the customer's eligibility for enrollment. A customer request for service under the CleanPowerSF CSGT rate that is received less than 5 business days before the customer's next billing cycle may result in the customer being placed on the CleanPowerSF CSGT rate for the following billing cycle.

A participating customer may remain on the CleanPowerSF CSGT tariff for the duration of the solar project's contract term, or up to 20 years, whichever is less.¹² There is no contract or minimum commitment required when a customer enrolls in the CleanPowerSF CSGT program and there are no fees for enrollment or cancellation. Cancellation of a customer's participation will

¹¹ For the purposes of this program, the concept of a "host" only refers to a customer site where the project is located. The community solar project must be located in-front-of-the-meter, even if located at a customer host site.

¹² This expiration applies to the CPUC-funded DAC Solar programs only, CleanPowerSF may continue offering comparable programs beyond the 20-year timeframe.

become effective on the next meter read date after a cancellation request is made; cancellations made less than five (5) business days of the next meter read date may not be changed for an additional billing cycle. Customer participation in the CPUC-funded program will automatically terminate should the power supply agreement between CleanPowerSF and the CSGT project to which the customer is subscribed be terminated or the delivery term ends.

If a customer moves within CleanPowerSF service territory, they will need to reestablish their eligibility for the program. If the customer is found to still be eligible, CleanPowerSF will add the customer to the program if capacity allows or add them to the end of the waitlist. CleanPowerSF will review the waitlist on a monthly basis and add customers as CleanPowerSF CSGT project capacity allows.

b. Sponsor Enrollment

A sponsor of a CleanPowerSF CSGT project is subject to the same enrollment rules and requirements as described above for residential customers with one modification. A sponsor's subscription allocation is limited to a maximum of 25% of the project's energy output, not to exceed the sponsor's energy needs. The same principle applies if multiple sponsors share the 20% discount. If two or more sponsors are designated, the sponsors will need to inform CleanPowerSF in writing how to allocate the "discountable usage" between them.

III. Rates

a. Residential Customer Rates

Customers taking service on this rate schedule will receive a 20% discount on the electric portion of their bill compared to their otherwise applicable rate schedule or OAS. The discount applies as long as the customer is enrolled under the program and complies with all of the eligibility and enrollment terms.

For low-income customers, the OAS is the customer's existing CARE or FERA rate. Accordingly, the 20% discount will be applied to bills after the CARE/FERA discount has been applied. The discount applies as long as customers are enrolled under the program and comply with all of the eligibility and enrollment terms.

For customers who are not enrolled in CARE or FERA, the OAS is the customer's existing rate schedule before program enrollment. Residential customer SAIDs that are already enrolled in CleanPowerSF's other 100% renewable energy generation service option (i.e. CleanPowerSF's "SuperGreen" product) will be switched to CleanPowerSF's base product (i.e. CleanPowerSF's "Green" product) for the purposes of calculating the 20% discount when enrolling under the program.

b. Sponsor Rates

A CleanPowerSF CSGT project sponsor who meets all of the eligibility requirements outlined above receives a 20% bill discount on its enrolled account. The sponsor bill discount will be calculated based on the same methodology as described above for residential program participants with one modification. The sponsor bill discount is only applied to a sponsor's subscription allocation, i.e. limited to a maximum of 25% of the project's energy output, not to exceed the sponsor's energy needs under the enrolled SAID. The discount applies as long as

sponsors are enrolled under the programs and they comply with all the sponsor eligibility and enrollment terms described above.

If two or more sponsors are designated, both sponsors must inform CleanPowerSF in writing of how the “discountable usage”, capped at 25% of the project’s energy output is to be allocated among them. CleanPowerSF will then calculate the applicable discount to each sponsor accordingly.

The sponsor’s discount is available to sponsors only after the community solar project has reached its required minimum 50% low-income subscription rate. If the subscription rate of low-income customers drops under 50% of project capacity at any time throughout the life of the project, the sponsor bill credit will not be revoked.

IV. Billing

Monthly bills are calculated in accordance with the customer’s OAS and the provisions contained herein. The amount credited under Schedule CleanPowerSF CSGT is provided by both PG&E and CleanPowerSF: CleanPowerSF calculates the 20% discount for the generation portion of the electric bill and PG&E calculates the 20% discount for the delivery portion of the electric bill.

Both entities display the discount on their respective portion of the customer’s utility bill.

V. Metering

All customers must be metered according to the requirement of their OAS.

APPENDIX D – AL 25E

Marketing, Education and Outreach Plan for CleanPowerSF



Services of the San Francisco
Public Utilities Commission



I. Purpose and Goals

The overarching goal of the CleanPowerSF DAC-GT and CSGT programs is to provide low-income customers living in disadvantaged communities (“DACs”) with access to the benefits of 100 percent renewable energy at a 20 percent discount on their electricity bills.

CleanPowerSF will build upon the previous program years and continue to execute a targeted customer marketing, education, and outreach (“ME&O”) Plan to CleanPowerSF customers living in DACs to make them aware of the opportunity to enroll in and benefit from the CleanPowerSF DAC Green-Tariff (“DAC-GT”) and CleanPowerSF Community Solar Green Tariff (“CSGT”) programs.

This ME&O Plan has five main goals targeted to customers in DACs served by the CleanPowerSF program:

1. Enroll eligible customers in CleanPowerSF DAC-GT and CleanPowerSF CSGT programs;
2. Enhance recognition of and enrollment in the CARE and FERA discount programs;
3. Improve customers’ understanding of their energy usage, savings options, rate choices (i.e., TOU) and other customer incentives, discounts, or programs;
4. Identify and overcome barriers to renewable energy program participation and leverage best practices to ensure outreach to DAC and hard-to-reach customers is accessible and equitable; and
5. Increase awareness of CleanPowerSF as San Francisco’s local, clean electricity provider.

To meet these goals, CleanPowerSF will develop a targeted customer engagement campaign that leverages community-based marketing best practices such as:

- A mix of multilingual and culturally competent communications including newsletters, social media, email and direct mail; and
- Direct customer outreach and partnerships with community-based organizations (CBOs) and local government agencies.

Ultimately, CleanPowerSF will measure ME&O program success by the number of customers enrolled in the DAC-GT and CSGT programs. CleanPowerSF will also measure program success by the overall number and diversity of customers reached.

II. Guiding Principles

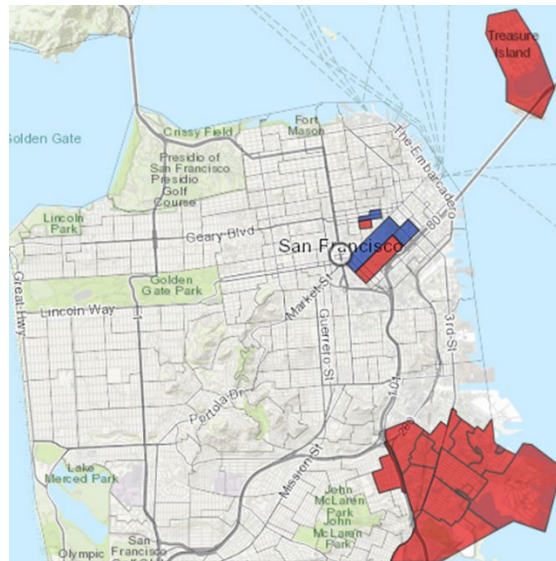
CleanPowerSF is committed to developing culturally appropriate communication strategies to ensure that stakeholders can participate in decisions and actions that impact their communities.

As such, CleanPowerSF commits to the following guiding principles throughout the ME&O engagement process for the DAC-GT and CSGT programs. CleanPowerSF aims to:

- Achieve diverse and meaningful engagement that reflects the demographics of San Francisco DAC communities to ensure equitable outreach across race, income, ability, language preferences, and age;
- Maintain transparency and accessibility of information by bringing the information directly to customers in their neighborhood, in their community, or interest space to better engage them in the process; and
- Build a collaborative process with community partners to ensure barriers to participation are overcome and benefits to participation are maximized in ME&O activities.

III. Target Audiences

In accordance with the DAC-GT and CSGT program eligibility criteria, the primary target audience is CleanPowerSF customers who are low-income (eligible for CARE/FERA) and live in DACs. Based on CalEnviroScreen 3.0 and 4.0, CleanPowerSF's service territory includes 17 DAC census tracts with an estimated 8,700 eligible residential CleanPowerSF customer accounts.¹



The following are the specific census tracts in ascending CalEnviroScreen 3.0 and 4.0 order:

- 6075012301
- 6075012502
- 6075017601

¹ Customers living in the census tract on Treasure Island are entirely served by Hetch Hetchy Power, San Francisco's municipal electric utility.

- 6075017801
- 6075017802
- 6075017902
- 6075023001
- 6075023003
- 6075023102
- 6075023103
- 6075023200
- 6075023300
- 6075023400
- 6075025702
- 6075061000
- 6075061200
- 6075980600

IV. Outreach and Engagement

To meet our ME&O goals, CleanPowerSF will conduct outreach and engagement that includes a targeted, multilingual, and culturally competent approach that addresses the specific needs of DAC communities in San Francisco. In addition to the tactics listed below, staff may explore auto-enrollment approaches of qualifying customers as well.

a. **Marketing and Communications**

CleanPowerSF will leverage a wide variety of marketing and communication tactics to promote the DAC-GT and CSGT programs. All materials will be translated (Spanish, Chinese, Filipino and others as identified by community) and will continue to be improved upon throughout the ME&O process to ensure they are culturally competent and effective.

CleanPowerSF will utilize targeted email marketing and direct mail, the latter of which has proven effective for enrollment in customer programs.

A variety of communications content will be utilized to support this phase, including flyers, fact sheets, and dedicated webpages for both programs on the CleanPowerSF website.

b. **Grassroots Outreach**

CleanPowerSF will conduct grassroots outreach to engage directly with residents at community events, which will become increasingly important tactic post-COVID.

Staff will also continue specific outreach efforts made in 2023 and 2024 to eligible CleanPowerSF customers living in affordable housing properties in DACs. Staff conducted Town Halls and held office hours at these sites to enroll customers in the DAC-GT program. CleanPowerSF provided food, and translation and interpretation services.

c. **Partnerships with CBOs**

Partnering with CBOs is a critical component of CleanPowerSF's ME&O plan. CBOs have intimate knowledge of their communities and will serve as valuable resources for how best to conduct outreach for the CleanPowerSF DAC-GT and CSGT programs.

CleanPowerSF had solicited CBO participation for CleanPowerSF's DAC-GT and CSGT program outreach through the PUC.PRO.0218 request for proposals (RFP). Unfortunately, no proposals were submitted, and the solicitation was closed. However, staff are in the process of working on a new request for proposals via PUC.PRO.0266. This contract will award four-year contracts to up to four CBOs. Winning CBOs will enroll qualifying residents into the CleanPowerSF DAC as well as engage with their community members on the CARE and FERA discount programs, general information on clean energy benefits, and other tasks. This contract should be available during 2024.

While CleanPowerSF does not expect to offer the CSGT program in 2024, outreach and education work will need to be conducted to lay the groundwork for a successful program launch. CleanPowerSF plans to leverage the CBO contracts awarded through its PRO.0266 RFP to increase awareness of discount programs available to customers, including CARE, FERA, and the DAC programs. It is CleanPowerSF's expectation that improving awareness of these discount programs will increase enrollment. The benefits of increased CARE/FERA enrollment are twofold: 1) Customers who are eligible for bill discounts under CARE/FERA will receive them even before CSGT program launch and 2) There will be larger pool of income-eligible customers to conduct CSGT outreach to when CleanPowerSF is ready to enroll customers. This will facilitate meeting the 50% low-income threshold required by the CPUC for a CSGT project.

V. ME&O Evaluation

Because CleanPowerSF is using multiple tactics for ME&O, a variety of metrics will be used to evaluate the effectiveness of each effort:

- Total number of residents reached
 - Direct (in-person contacts)
 - In-direct (impressions, views)
- Total CleanPowerSF DAC-GT and CleanPowerSF CSGT enrollees
- Total CARE and FERA enrollment achieved through CleanPowerSF's DAC-GT and CSGT outreach
- Website visits and page views
- Email click-through and open rates
- Direct mail reach and/or response rates
- Phone calls and emails to our Call Center
- Diversity in race, age and event participants with participation that reflects the census distribution demographics of the DAC communities
- Digital communications engagement and impressions
- Total number of events or avenues and distribution of events/avenues by neighborhood.

By regularly monitoring these metrics, CleanPowerSF will be able to make changes in its approach or shift the mix of ME&O channels to improve the effectiveness of outreach, as necessary.

VI. ME&O Budget

CleanPowerSF's total ME&O budget proposal for PY 2024 is \$66,162. Table 1 below includes a summary of the budget by cost category. This plan and budget will be presented in CleanPowerSF's DAC-GT and CSGT annual budget advice letter filing.

Table 1: CleanPowerSF's Proposed ME&O Budget for PY 2024

Item	2024	
	DAC-GT	CSGT
General Marketing	\$2,500	\$2,500
Targeted Marketing	\$2,500	\$2,500
CBO Engagement	\$10,000	\$10,000
Staff Time	\$18,081	\$18,081
Subtotal	\$33,081	\$33,081
Total		\$66,162