

Attachment D

Outreach and Education Program Description

Pacific Power Transportation Electrification Outreach and Education Pilot Program

Pacific Power proposes a three-year Outreach and Education Pilot program to help increase exposure to, and understanding of, electric transportation and its benefits among customers in its Washington service area. The Company serves as a trusted advisor to customers, and has a long history of educating customers about energy options and emerging technologies; however, electric transportation is a new and quickly evolving market. Accordingly, the initial phase of the Outreach and Education Program will test a diverse portfolio of tactics and messages. Lessons learned through this program will help Pacific Power develop best practices that will inform future programs.

Pacific Power has proposed comparable programs for its customers in both Oregon and California, which should allow for efficiencies in program delivery and economies of scale in implementation. While the Company will leverage economies of scale across the three states, programs activities will differ by state to reflect customer needs and regulatory priorities.

PROGRAM OBJECTIVES

Studies suggest that exposure to plug-in electric vehicles (PEVs) and electric vehicle supply equipment (EVSE) are positively correlated to favorable perception of PEVs.¹ Further research indicates that general exposure is the first obstacle to overcome to accelerate adoption of PEVs.² Pacific Power's primary objective for the proposed program is to test its ability to increase awareness and understanding of transportation electrification (TE) through different outreach and education tactics that align with the Washington Utilities and Transportation Commission's (Commission's) Policy Statement,³ the Washington State Electric Vehicle Action Plan,⁴ and the efforts of other organizations working to accelerate TE in Washington.

Data suggest that cost is a commonly cited reason to not consider a PEV, which could be due to actual or perceived costs of PEV ownership. The proposed Outreach and Education Pilot program is expected to help Pacific Power customers understand the true costs of PEV adoption, including opportunities to reduce the upfront cost (e.g., federal tax credits) and how to assess lifetime cost relative to an internal combustion engine vehicle.

Further, the proposed Technical Assistance elements are expected to help address the lack of EVSE development in Pacific Power's service territory by providing a convenient, no-cost opportunity

¹ Mark Singer, *Consumer Views on Plug-in Electric Vehicles – National Benchmark Report (Second Edition)*, pp. 26 (Dec. 2016), available at

http://www.afdc.energy.gov/uploads/publication/consumer_views_pev_benchmark_2nd_ed.pdf (last visited Apr. 11, 2017) (hereafter NREL Study).

² Kenneth S. Kurani, Nicolette Caperello and Jennifer TyreeHageman *New Car Buyers' Valuation of Zero-Emission Vehicles: California*, p. 72 (Aug. 2016),

<https://www.google.com/search?q=New+Car+Buyers%E2%80%99+Valuation+of+Zero-Emission+Vehicles%3A+California&sourceid=ie7&rls=com.microsoft:en-US:IE-Address&ie=&oe=#spf=1> (last visited Apr. 11, 2017).

³ Policy and Interpretive Statement Concerning Commission Regulation of Electric Vehicle Charring Services, Docket UE-160799 (Jun 2017).

⁴ Washington State Department of Transportation, *Washington State Electric Vehicle Action Plan 2015-2020* (Feb. 2015).

to access credible expertise and reduce uncertainty about costs and logistics of EVSE projects. In particular, the Company expects to help encourage additional workplace, fleet and publicly accessible EVSE.

PROGRAM ELEMENTS

The proposed Outreach and Education Pilot includes four primary elements designed to complement, not duplicate, existing education and outreach resources currently available to Pacific Power customers. Given the low adoption of PEVs and EVSE in Pacific Power’s Washington service area to date, customers’ level of interest in the proposed activities is not known at this time, which makes it difficult to establish participation goals. To assess pilot program effectiveness, the Company will track participation in events and services, survey participants on their experience in the program, explore the extent to which the pilot program accelerated transportation electrification, and report results and findings annually to the Commission.

1. Customer Communications

In the Company’s experience, a combination of targeted and general awareness tactics that direct customers to additional educational resources maximizes the impact of outreach and education programs. To test messaging and tactics, Pacific Power will deploy a suite of communications designed to increase awareness of electric transportation and motivate customers to access the Company’s PEV tools and resources. During the program, the Company will test a wide range of tactics and messages to understand which are most effective in increasing awareness and driving adoption of PEVs.

Tactics

The following communication tactics reflect the Company’s preliminary communications plan. The plan is flexible and adaptable to account for potential lessons learned and new opportunities.

Table 1. Preliminary Communications Plan

Tactic	Frequency
Paid advertising E.g., digital, paid search and print	Approximately 3-5 total weeks to increase awareness of the benefits of PEVs and support efforts such as community events or National Drive Electric week.
Bill inserts Promoting the benefits of PEVs and directing customers to additional Company resources	Residential – 1 insert Non-residential– 1 insert
Physical handouts E.g., a residential brochure for events, dealerships, upon request	Create once and update if needed
Digital assets E.g., infographic explaining the benefits of PEVs	Create 1 – 2 and update if needed
Targeted emails to potential high-propensity customers	1 – 2 email campaigns

E.g., Blue Sky ⁵ program participants	
Customer newsletter stories	Residential newsletter (print & email) – two stories Non-residential newsletter (email) – one story
Organic and promoted social media posts	As content is created through the program and other relevant TE efforts

Targeting

The proposed program will build awareness across Pacific Power’s customer base; however, certain targeted communications may be deployed to maximize the impact of the program’s proposed budget. The Company expects to learn more about targeting strategies throughout the program, but proposes the following initial principles for targeted communications:

- Target higher-cost tactics to potential high-propensity customers, such as those participating in other environmentally focused programs. For example, customers voluntarily participating in the Company’s Blue Sky program.
- Target communications to customer groups with the ability to influence additional customers. For example, targeting a message about workplace charging to business customers may result in more electrification per message (e.g., one business customer providing workplace charging may encourage multiple employees to purchase a PEV).
- Ensure access to resources (e.g., materials for Spanish speakers)
- Target different messages to different segments and analyze survey data to adjust strategy as necessary.

Messaging

During the program, the Company will test messaging to develop best practices. The initial messaging strategy includes the high-level concepts discussed in Table 2.

Table 2. Key Audiences and Messages

Element	Messaging Strategy
Call to action	<p>General: <i>Access Pacific Power’s resources to learn more</i> Targeted: <i>Understand your options</i></p> <ul style="list-style-type: none"> • Attend a ride-and-drive to learn more (Residential) • Visit <i>Pacific Power’s</i> website to use self-service resources • Request Technical Assistance (Non-residential) • Apply for Demonstration and Development Program funds (Non-residential)
Residential customers	<p><i>Now’s the time to consider a PEV</i></p> <ul style="list-style-type: none"> • <i>Drive Green:</i> PEVs improve air quality • <i>Make Life Easier:</i> No need to visit gas station, no oil changes • <i>Save Money:</i> Can be less expensive to operate than an internal combustion engine vehicle

⁵ Pacific Power’s Blue Sky program is a voluntary program that allows customers to green their energy use with renewable energy from the region. For additional information, see www.pacificpower.net/BLUESKY.

	<ul style="list-style-type: none"> • <i>Peace of Mind:</i> More public stations and/or home equipment
Non-residential customers	<p><i>Be a Green Leader:</i></p> <ul style="list-style-type: none"> • Electrify your fleet and offer workplace charging as a service and benefit for employees • Make your business a destination by offering public charging

2. Self-service Resources

As a trusted information source for customers,⁶ Pacific Power proposes to develop online self-service resources to connect its customers with convenient, tailored information about the costs and benefits of PEVs. More generic resources are available from external parties; however, the tools developed through this program will be easy for Pacific Power customers to locate (i.e., customers already look to Pacific Power for information about electricity use) and provide information tailored toward Pacific Power’s service area, rates, and customer base.

Procurement

Pacific Power has received regulatory approval to develop PEV tools for its Oregon customers, and a similar application is currently under consideration by the California Public Utilities Commission. Pacific Power will release a multi-state request for proposals (RFP) to identify the most appropriate tools and resources for customers in all three states with the intent of leveraging economies of scale to minimize the costs to Washington customers.

Targeting

These tools will be available to all customers interested in understanding more about electric transportation. At a minimum, the Company expects to identify a tool that provides customizable analysis of the costs and benefits of PEV ownership for residential customers⁷ and may include non-residential TE (e.g., fleet electrification assessment tools) and other sectors that rely on Pacific Power for information (e.g., builder check lists for PEV-ready new construction). Based on responses to the RFP, the Company may select additional tools that serve additional sectors or functions.

3. Community Events

Data suggest that events are among the most effective electric transportation outreach tactics.⁸ Since 2015, the Plug-in Electric Vehicle Collaborative has organized a series of educational and experiential ride-and-drive events across California. Analysis of these events suggests that

⁶ Pacific Power’s website totaled roughly 1.7 million users in 2016, roughly 60% returning visitors and 40% new.

⁷ The Company envisions a tailored, more robust version of the Alternative Fuel Data Center’s Vehicle Cost Calculator. <http://www.afdc.energy.gov/calc/> (last visited Apr. 11, 2017).

⁸ National Academy of Sciences, *Overcoming Barriers to Electric-Vehicle Deployment Interim Report*, p. 56 (2015), <https://www.nap.edu/catalog/21725/overcoming-barriers-to-deployment-of-plug-in-electric-vehicles> (last visited Apr. 11, 2017) (hereafter National Academy of Sciences Study).

participation is correlated with improved perception of PEVs and likelihood to consider buying or leasing a PEV.⁹

Pacific Power’s event outreach strategy will focus on ride-and-drive events and incorporate additional event types where appropriate. There is no single ride-and-drive model, but ride-and-drive events typically include the following features:

- A centralized time and location for consumers to test drive PEV models and learn more about electric transportation technology.
- Events may be stand-alone or in conjunction with an existing event, such as an Earth Day celebration or auto show.
- Outreach is a primary component, which may include paid advertising (e.g., radio, print, email) along with onsite collateral, such as banners or flyers.
- Partnership between multiple contributors is another common feature (e.g., industry groups, utility companies, local governments, vehicle manufactures or dealerships).

In addition to ride-and-drive events, the Company will participate in dedication events organized by recipients of funding through the proposed Demonstration and Development Pilot program. As allowed within the budget, Pacific Power also plans to provide financial sponsorship or host a booth at existing community events as opportunities arise (e.g., sponsor a local farmers market in exchange for advertising space specific the company’s electric transportation resources).¹⁰ Pacific Power is experienced receiving and evaluating similar event sponsorship and booth requests.

Table 3. Community Event Summary

Event type	Pacific Power involvement
Ride-and-Drive events	Pacific Power plans to coordinate and promote five events in its Washington service area through an event management vendor
Demonstration and Development project dedication events	Pacific Power will participate in dedication events for projects funded through the proposed Demonstration and Development Program where possible. Funding recipients will be expected to serve as lead organizer.
Ad hoc event sponsorship	Financially sponsor and/or host a booth for community events to further raise awareness and provide information about TE. Availability of funds to be determined after finalizing pricing for ride-and-drive events.

Procurement

The Company will issue a competitive solicitation to identify an event management vendor or multiple vendors to coordinate the ride-and-drive events. To capitalize on economies of scale and minimize costs to Washington customers, this solicitation will include ride-and-drive events

⁹ Plug-In Electric Vehicle Collaborative, *Best. Ride. Ever! FINAL REPORT*, Addendum F (Feb. 2017), <http://www.pevcollaborative.org/sites/all/themes/pev/files/2016%20BRE%20Final%20Report.pdf> (last visited Jun. 02, 2017).

¹⁰ After a vendor is selected to manage ride-and-drive events, the Company will determine the amount of funds remaining in the program budget that can be used to sponsor community events.

approved and proposed in Pacific Power's Oregon and California service areas. RFP evaluation criteria will identify vendors with experience organizing similar events and the ability to organize and implement these events in the Company's Washington service area. In addition, evaluation criteria will favor vendors that can leverage a funding match to co-sponsor the events.

Location

The Company will work with its selected event management provider to identify ride-and-drive locations that maximize customer access across its Washington service area. The Company will have less discretion over the location of other event types, but will consider location and expected reach when evaluating ad hoc sponsorship and/or booth opportunities.

4. Technical Assistance

The proposed suite of self-service resources are expected to meet most of the needs of residential customers trying to understand their charging options; however, the Company anticipates additional resource needs for certain non-residential customers considering EVSE projects. For example, home charging can be accomplished with a simple 110 Volt wall outlet (Level 1) or a 240 Volt outlet (Level 2) and will almost exclusively be sited in the garage or driveway. Workplace, fleet, multi-family and public charging projects can be more complex in terms of system requirements, power requirements, whether and what to charge drivers, location of EVSE on premises (e.g., which part of the parking lot), trenching and make-ready costs, and access to three-phase power for DC fast chargers (DCFCs). Pacific Power proposes to offer robust, custom, onsite technical assistance to meet the additional needs of non-residential customers considering EVSE projects in its Washington service area.

Procurement

Through a competitive bidding process, the Company will identify qualified contractors to perform on-site EVSE feasibility assessments for interested non-residential customers. Qualified contractors will be required to demonstrate experience performing the requested services and the ability to serve customers across Pacific Power's Washington service area.

Services

This program model draws on best practices developed through other Pacific Power programs, such as energy efficiency engineering services provided to non-residential customers in Washington through the *wattSmart* Business program.¹¹ Eligible customers will request a custom analysis by submitting an online or written application. Contractors will be deployed to non-residential customer sites to perform custom analysis of EVSE technology options, costs, rates and best practices for siting, configuring, installing and managing equipment. Pacific Power will receive copies of consultant analysis and will use this information to better understand the types of projects that non-residential customers are considering.

PROGRAM COSTS

Proposed costs to deploy this pilot program in Washington, including program administration and reporting, are \$500,000, as presented in Table 4. These costs are based on an expectation that the

¹¹ Examples of *wattSmart* Business services are located at <https://www.pacificpower.net/bus/se/tr.html>

Company will be able to reduce costs to Washington customers through economies of scale and joint procurement with similar Oregon and California programs. Estimated expenditures by program element reflect the Company’s priorities for this program. Actual expenditures by program element will be dictated by customer and community demand for offered outreach and education services and the Company will manage budgets at the program level.

Pacific Power intends to offer services through this program at no direct cost to customers. Customers who choose to adopt electric transportation or EVSE as a result of services received through this program will be responsible for the cost of purchasing, installing and maintaining equipment without financial assistance from the Company.¹²

Custom technical assistance will require a customer time commitment such that Pacific Power does not anticipate the need for safeguards to ensure program spending is limited to participants likely to implement projects. The Company will monitor participation to ensure that services are being deployed as intended and may implement a nominal participation fee, if needed.

Table 4. Estimated Program Costs

Cost Category	2018	2019	2020	2021	Total
Outreach and Education Initiatives ¹³		\$155,000	\$155,000	\$95,000	\$405,000
Program Administration and Evaluation	\$10,000	\$30,000	\$30,000	\$25,000	\$95,000
Total	\$10,000	\$185,000	\$185,000	\$120,000	\$500,000

IMPLEMENTATION TIMELINE

Major milestones are presented in Table 5 below. The implementation schedule includes quarterly milestones and is subject to change as required by the program approval timeline and additional factors, such as solicitation results.

The proposed program represents the first phase of Pacific Power’s customer outreach and education efforts around electric transportation. During the program, the Company will track the utilization and effectiveness of the proposed tactics to inform whether a program extension or expansion would be appropriate.

Table 5. Outreach and Education Program Implementation Schedule

Major performance milestones	'18	2019				2020				2021			
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Customer Communications													
Develop collateral (brochures, fact sheets)													
Execute communications plan													
Self-service Resources													
Self-service resource selection and contracting													
Web design and testing													
Tools available													
Community Events													

¹² Non-residential EVSE projects may be eligible to receive funding through Pacific Power’s proposed Demonstration and Development Pilot program.

¹³ Includes customer communications, self-service resources, community events, and technical assistance. Budgets for each component will be provided confidentially with the program filing.

Ride-and-drive vendor selection and contracting													
Event planning													
Implement ride-and-drive events													
Ad hoc event participation													
Technical Assistance													
Provider selection and contracting													
Develop technical assistance processes													
Technical assistance available													
Data Collection and Reporting													
Gather data													
Compile and analyze data													
Annual report on program activities and evaluation results													

DATA COLLECTION AND REPORTING

Data Collection

This program will allow the Company to collect data required to develop specific metrics, projections, and best practices for future program development. At this stage, data collection will focus on gathering information that can be used to understand customer needs and develop more specific targets and measures of success. To maximize the program budget, the Company will leverage existing data collection channels and build additional data collection into program elements as described in Table 6 below.

Table 6. Outreach and Education Data Collection

Program Element	Data Collection
Customer Communications	<ul style="list-style-type: none"> • Build analytics and surveys into website, digital communications (i.e., email and social media). • General PEV awareness and acceptance questions included in existing customer research surveys.
Self-service Resources	<ul style="list-style-type: none"> • Build analytics and surveys into self-service tools, if possible.
Community Events	<ul style="list-style-type: none"> • Engage third-party provider to collect event information, such as number of attendees and number of rides, as well as, survey attendees before and after event to gauge impact of attendance on PEV perception and adoption.
Technical Assistance	<ul style="list-style-type: none"> • Collect participant data such as number and type of recipient. • Collect project data such as number and level of charging equipment considered.

	<ul style="list-style-type: none">• Collect data about conversion of technical assistance to completed projects.
--	--

Reporting

Pacific Power will update the Commission annually on program activities. At the end of the pilot period, the Company will synthesize data collected and report program outcomes and any recommendation for program continuation or expansion to the Commission. The Company expects to file this report by the end of 2021.

COST RECOVERY

Pacific Power will submit a petition for deferred accounting treatment of the costs associated with its electric vehicle supply equipment (EVSE) programs. The actual costs associated with the programs will be tracked for ratemaking treatment in a future filing.