

**EXH. CLW-4
DOCKETS UE-240004/UG-240005
2024 PSE GENERAL RATE CASE
WITNESS: CAROL L. WALLACE**

**BEFORE THE
WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION**

**WASHINGTON UTILITIES AND
TRANSPORTATION COMMISSION,**

Complainant,

v.

PUGET SOUND ENERGY,

Respondent.

**Docket UE-240004
Docket UG-240005**

**THIRD EXHIBIT (NONCONFIDENTIAL) TO
THE PREFILED DIRECT TESTIMONY OF**

CAROL L. WALLACE

ON BEHALF OF PUGET SOUND ENERGY

FEBRUARY 15, 2024

Customer Solutions

2023 Marketing

2.27.23



Self-Service Digital Tools

2nd qtr. Digital Tools activities

In the 2nd quarter Digital Tools activities will continue to support ongoing efforts to increase adoption of digital tools on pse.com and our mobile app to promote the use of customer self-service

Google Ad Words (SEM)

- Tactic has been primarily used for the assistance programs. With new language capabilities on pse.com, expanding to support AutoPay, myPSE app, Billing Arrangements, Paperless Billing and Digital Account creation

Email

- To be used to generate awareness and engagement for using AutoPay, Billing Arrangements and the myPSE app

The Voice

- Tactic to be used to promote AutoPay sign-ups

New Customer Booklet

- This booklet that is given to all new customers to PSE will include information on the value of having a digital account, paperless billing and the myPSE app
- Budget: \$9,600



Named Communities

Named Communities defined

Highly Impacted Communities

A community designated by the Department of Health based on the cumulative impact analysis or a community located in census tracts that are fully or partially on “Indian country.” Communities ranked by environmental burdens/risk to climate change, combined with socioeconomic & health issues.

Vulnerable Populations

Communities that experience a disproportionate cumulative risk from environmental burdens due to: Adverse socioeconomic factors, including unemployment, high housing and transportation costs relative to income, access to food and health care, linguistic isolation, and sensitivity factors, such as low birth weight and higher rates of hospitalization.

What we are trying to do

Goal:

To meet the CETA objectives and progressing towards our aspirational Beyond Net Zero Carbon by 2045 goal, by ensuring that all customers, no matter their income level, have affordable access to energy and can benefit from a clean energy future.

Objective:

- To engage with CBOs to incorporate third party voices to share program information with their clients/customers
- To provide our customers a holistic overview of the programs and services offered by PSE
- Reduce language and technology hurdles as a means to achieve awareness and increase engagement

Who we are trying to reach

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Primary Customer Segments:

- Customers who income qualify for assistance programs; 200% FPL and below, 80% AMI
- Named Communities customers, determined as residing in Highly Impacted Communities (HIC) and designated as a high-level Vulnerable Population (VP)
- Multi-family property owners and managers in Named Communities and/or of facilities with income eligible customers

Secondary Customer Segments:

- Named Communities customers, determined as residing in Highly Impacted Communities (HIC) and designated as a medium-level Vulnerable Population (VP)
- PSE customers who are 60+ days behind on payment of their energy bill, who do not income qualify
- All PSE customers through our service area
- Key civic and governmental stakeholders



Who are we trying to reach

Named Communities segments:

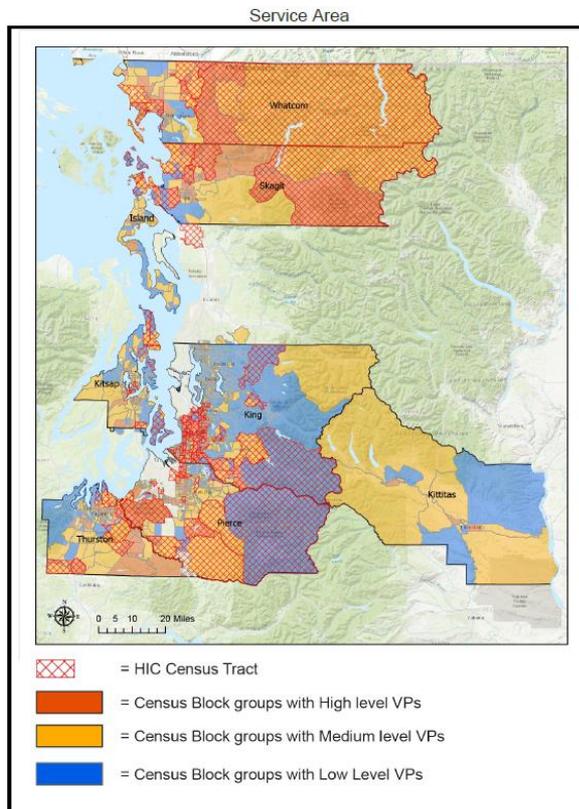
Primary audience – HIC designation & high-level VP
(268,000 customers)

Secondary audience – HIC designation & medium-level VP
(111,000 customers)

Residential marketing efforts will be concentrating on 47 of the 235 Named Communities zip codes. These counties comprise 85% of PSE customers who are deemed being high level Vulnerable Population.

Named Communities Service Area

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How we are trying to reach them

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Integrated Program Awareness:

- Utilizing selected programs from Customer Solutions, Energy Efficiency and New Product Development
- Bundled promotion of assistance programs
- Bundled promotion of “clean efficiency” programs

Targeting:

- Concentrating our assistance program efforts on reaching high-level vulnerable community populations
- Promote clean efficiency program to both high and medium-level vulnerable community populations
- Utilize opportunities to target segments by age, language preference and home ownership



How we are bundling programs

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Assistance Programs:

- HELP
- LIHEAP
- Warm Home Fund
- LIW

Clean Efficiency Programs:

- Efficiency Boost
- Smart Thermostats
- Community Solar
- Multi-family Retrofit



Named Communities Marketing Calendar

	Q1									Q2									Q3									Q4																							
	January			February			March			April			May			June			July			August			September			October			November			December																	
	26-Dec	2-Jan	9-Jan	16-Jan	23-Jan	30-Jan	6-Feb	13-Feb	20-Feb	27-Feb	6-Mar	13-Mar	20-Mar	27-Mar	3-Apr	10-Apr	24-Apr	1-May	8-May	15-May	22-May	29-May	5-Jun	12-Jun	19-Jun	26-Jun	3-Jul	10-Jul	17-Jul	24-Jul	31-Jul	7-Aug	14-Aug	21-Aug	28-Aug	4-Sep	10-Sep	18-Sep	25-Sep	2-Oct	9-Oct	16-Oct	23-Oct	30-Oct	6-Nov	13-Nov	20-Nov	27-Nov	4-Dec	11-Dec	18-Dec
Assistance Programs - English	[Orange bar]																																																		
Primary audience	[Orange bar]																																																		
Assistance Programs/Clean Efficiency - Seniors	[Orange bar]																																																		
Primary & secondary audiences	[Orange bar]																																																		
Assistance Programs - Vietnamese/Chinese	[Orange bar]																																																		
Primary audience	[Orange bar]																																																		
Assistance Programs - Spanish	[Orange bar]																																																		
Primary audience	[Orange bar]																																																		
Clean Efficiency - Homeowners	[Orange bar]																																																		
Secondary audience	[Orange bar]																																																		
Clean Efficiency - Tribal	[Orange bar]																																																		
Primary & secondary audiences	[Orange bar]																																																		
Assistance Programs - Tribal	[Orange bar]																																																		
Primary audience	[Orange bar]																																																		



2nd qtr. Named Community campaigns

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Senior campaign:

- Targeting: Seniors, HIC and medium & high level VP. Campaign will primarily use non-digital tactics due to levels for segment not having email or internet access
- Programs: Assistance & Clean Efficiency programs
- Timing: 3/28 – 6/7
- Tactics: Direct mail, radio, community newspaper ads, community outreach and email
- Budget: \$34,000

Chinese/Vietnamese effort:

- Targeting: Primary Chinese & Vietnamese speakers, HIC & high level VP. Timed with Asian/Pacific American Heritage Month, looking to engage though in-language effort with selected CBOs
- Programs: Assistance programs
- Timing: 5/1 – 5/30
- Tactics: Community outreach, in-language collateral
- Budget: \$4,500

