

Company: San Diego Gas & Electric Company
Proceeding: Residential Untiered TOU Rate
Application: A.21-09-XXX
Exhibit: SDG&E-03

PREPARED DIRECT TESTIMONY OF
APRIL BERNHARDT
ON BEHALF OF SAN DIEGO GAS & ELECTRIC COMPANY

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

September 1, 2021



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**PREPARED DIRECT TESTIMONY OF
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I. OVERVIEW AND PURPOSE

The purpose of my prepared direct testimony is to address the Marketing, Education, and Outreach (ME&O) for San Diego Gas & Electric Company’s (SDG&E) proposed new opt-in, un-tiered, residential Time-of-Use (TOU) rate with a fixed charge, herein referred to as (“TOU-ELEC”). Per Decision (D) 20-03-003, Ordering Paragraph 10 of that decision states that SDG&E includes “a plan for customer outreach and education to encourage potentially eligible customers to take advantage of the rate.” The Prepared Direct Testimony of Hannah Campi (Exhibit SDG&E-02) outlines SDG&E’s proposed rate design, Schedule TOU-ELEC,¹ that would be available to residential customers charging an electric vehicle (EV), utilizing energy storage, or utilizing electric heat pumps for water heating or climate control.

SDG&E recognizes the need to raise awareness of available rates so that customers can make informed decisions of what plan is best for their household and lifestyle. To this end, SDG&E plans to conduct ME&O activities to create awareness about this new rate and drive enrollment for customers who may benefit from the new plan. SDG&E has made positive strides in pricing plan awareness. As part of the mass default transition to TOU rates, customers who remained on TOU six months post-transition were surveyed to measure their experience and awareness. As reported in the Q1 2021 Quarterly Report on the Progress of Residential Rate Reform, “Customers perceived they had sufficient information to make a choice and that choices

¹ “TOU-ELEC” is an interim name for said rate. SDG&E reserves the right to rename this rate at a later date.

1 were available that could help them control their bill. Six in ten understand they can change their
2 plan to one that better suits their needs.”²

3 SDG&E’s primary challenge in educating and outreach for Schedule TOU-ELEC is the
4 ability to target communications at the individual customer level as EV and heat pump
5 ownership are not required information for the customer, except for customers that participate in
6 an EV rate or EV incentive program.

7 The overarching ME&O goals are threefold:

- 8 1. Drive residential customer awareness and engagement of Schedule TOU-ELEC
9 and its benefits.
- 10 2. Inform customers about the rate details to help them determine if it is a right fit
11 for their household.
- 12 3. Reinforce customer choice when it comes to available rates.

13 **II. MARKETING, EDUCATION AND OUTREACH PLAN**

14 To effectively communicate with customers about Schedule TOU-ELEC,
15 SDG&E plans to use a mix of general awareness and direct communication considering the
16 needs of specific customer segments and in-language needs. General awareness tactics that will
17 be used and available to most customers involve the bill package, social media, website, and
18 outreach activities. Direct communication tactics will include email and/or direct mail to
19 specific target audiences. At a high level, messaging would focus on the benefits (e.g., designed
20 for high-energy-use and lower off-peak rates), eligibility requirements, and the monthly charge.

² Rulemaking 12-06-013, SDG&E Quarterly Report on Progress of Residential Rate Reform (May 3, 2021) at 9.

1 **A. Target audience:**

2 ME&O activities will be targeted toward specific customer segments utilizing SDG&E's
3 available customer data, including segmentation and propensity modeling tools. SDG&E
4 expects to target the following customer segments:

- 5 • Residential customers who are participating or have participated in rate options
6 such as EV-TOU and Solar/Net Energy Metering.
- 7 • Residential customers who are participating or have participated in sustainable or
8 environment-friendly programs such as the Green Tariff Shared Renewable
9 (EcoChoice), Electric Vehicle Climate Credit, and Champions for Clean Air.
- 10 • Residential customers with a higher propensity to participate in sustainable and
11 environment-friendly programs, as mentioned above, as well as residential
12 customers for whom we have a record of installed energy storage.
- 13 • Across these customer segments, SDG&E will employ strategies to make
14 information available in-language, where appropriate.

15 **B. Integration**

16 The ME&O strategy will integrate TOU-ELEC with other rate-related activities such as
17 ongoing rate education, EV awareness campaign, and Community Based Organizations (CBO)
18 outreach, when appropriate. Leveraging existing resources provides a way to reach higher
19 propensity target segments that is not only cost-efficient but provides bundled solutions for these
20 audiences.

1 As part of SDG&E’s ongoing rate education, TOU-ELEC will be included in the seasonal
2 digital marketing campaign, which promotes the availability of rate options and rate-specific
3 energy-savings tips to help customers be successful.

4 Leveraging its partnership with more than 190 CBOs, ME&O activities will promote
5 TOU-ELEC at outreach events, when appropriate, and inclusion in SDG&E’s monthly content
6 packages for the CBOs to share with their constituents (e.g., social media posts and articles).

7 SDG&E will also provide education and support of the new rate through tactics currently
8 used for EV-related audiences such as Community Outreach and “Ride & Drive” events, which
9 provide an opportunity to interact directly with EV experts who can help customers better
10 understand how TOU pricing works generally, and how TOU-ELEC will work more specifically.

11 Additionally, SDG&E’s Business Services, Clean Transportation, and Community
12 Relations teams regularly participate in trade and community-based association outreach,
13 including with local dealers and EV associations. SDG&E will leverage those partnerships and
14 provide rate training and educational materials at meetings, workshops, and trade events.

15 **C. Tactics and Channels**

16 SDG&E will use a multi-channel engagement strategy to drive awareness and education
17 among residential customers, paying attention to those who may be eligible to enroll and/benefit
18 from this new rate.

19 General awareness tactics will include SDG&E webpages (EV, Solar, and Pricing Plan
20 page), social media posts, bill inserts, and News Center articles. Targeted communications will
21 consist of email and/or direct mail to the identified customer segments. In addition, talking points
22 will be developed for customer-facing employees, such as the Customer Contact Center, Branch
23 Offices, Outreach teams, and CBO partners.

1 ME&O activities and messaging may need to be adjusted based on customer feedback,
2 enrollment and/or economic conditions. Therefore, it is essential for marketing to be flexible and
3 responsive.

4 **III. SUMMARY AND CONCLUSION**

5 This concludes my prepared direct testimony.

6 **IV. WITNESS QUALIFICATIONS:**

7 My name is April Bernhardt. SDG&E employs me as a marketing manager in the
8 company's Corporate Communications and Marketing department. My business address is 8306
9 Century Park Court, CP-62C, San Diego, California, 92111.

10 I have been employed by SDG&E as a communications manager since 2010 with
11 increasing areas of responsibility. As the marketing manager of Pricing Plan Education, I oversee
12 the marketing and communication efforts for Clean Transportation, Demand Response programs,
13 Community Choice Aggregation, Rate Reform, and Net Energy Metering. My responsibilities
14 include developing marketing strategies to increase customer awareness and understanding of the
15 issues mentioned above. Additionally, I am responsible for collaborating with internal and
16 external stakeholders to ensure stakeholders are informed on critical Marketing, Education, and
17 Outreach activities.

18 Prior to my current role, I served as a senior project manager in communications
19 overseeing executive communications and internal change management for SDG&E. I also
20 served as a senior communications manager in Media and Employee Communications at
21 SDG&E and previously held management roles in communications at Sempra Energy and
22 Qualcomm Inc.

1 I graduated from San Diego State University with a Bachelor of Liberal Arts and Science
2 in Psychology. I have more than 17 years of experience working in corporate communications
3 and media relations, and most recently, marketing—my career spans working both in wireless
4 communications and the energy sector.

5 I have previously served as a witness before the California Public Utilities Commission.