

# Meeting Notes

## CleanPower Choice Working Group Meeting

Trenton BPU Offices, **May 21, 2008**

### Attendees:

In Person: Maureen Quaid (MQ), Anne Marie McShea (AMM), Kim Hoff (KH), Bill Marshall (BM)

By Phone: Scott Hunter, John Holtz, Meg Denney(MD), Walt Davis(WD), Melissa Standing(MS), Jim Campos, Charlie Garrison, Steve Weise(SW) for REC verification report portion only, Linda Russo, Terry Moran

### Agenda Items:

1. Customer Account Look Up, Anne Marie McShea:
  - AMM confirmed customer account lookup approved by BPU on May 8. She is waiting written approval which is expected the week of May 27, 2008.
  - Board order will go into effect 30 days after written approval is received.
  - AMM asked for much stronger support from CPMs now that account lookup is approved with emphasis on Community Partners, the fall Change a Light, and other actions to be defined by the CPMs.
  - BPU is expecting action from their approval.
  - Two meetings will be scheduled in June to discuss short term and long term plans.
2. 2007 Annual REC Verification Report, Steve Weise: SW confirmed that:
  - The final report was delivered in March 2007 and covered the energy year 2006 to 2007,
  - All CPMs were determined to have met their REC purchase requirements,
  - Preparation of the report was complicated by data deficiencies and differences in customer counts and energy consumed,
  - Data from CPMs was deemed more complete and therefore was used for compliance and report preparation,
  - Enrollment in the period was 9899 customers purchasing 69MWh of energy resulting in the retirement of 54,000 RECs, and wind and hydro accounted for most of the REC required.

SW commented the biggest recommendations concern improvement of data quality for use in future reports.

### Additional Comments:

AMM noted that about 6000 customers have been added since May 31 2007 through Q-1 2008, which totaled 15,652 for the end of the 1<sup>st</sup> quarter.

AMM commented that growth is only organic and that the program needs to double the level of enrollments. We need to take a very serious look at design and structure of the program and focus it on helping fulfill the State's EMP goals. AMM wants a face to face working group meeting in June to talk about realigning the Program to accelerate progress towards the 2% participation rate goal. We need to go back to goals set originally and how we can meet the goals.

AMM indicated that the final report will not be circulated to the group, but that a summary of it will be prepared and circulated.

3. Rule Making, Anne Marie McShea:

- The interim process the program has operated under since inception needs to be replaced with formal rules as the program moves forward.
- Part of the input for the rules will come from the 2007 CPC report, input from the CPC working group, and public comment.
- Rule making process will take 9 months at least. The aim is to have rules in place by Spring of 2009. To start this process there will be a meeting in June with CPMs and EDCs.

4. Spring Campaign Review, Kim Hoff:

- Utility bill inserts went out in April.
- Good recognition of bill inserts by the public being felt in outreach programs-Summit NJ mentioned specifically as very positive.
- Sent out a promotional e-mail to participating contractors in April asking them to personally sign up for CPC and to create employee awareness within their firms about the Program
- AMM asks that we not use the list serves for promotion items like CPC, but we can include promotional information in newsletters. As far as employee drives are concerned, utility partners, and others, have said they would do employees drives. Need to push them.
- Global Green was a big event of May. CEI sent a representative to help on one of the 3 days.
- Various teams have attended numerous other events around Earth Day.
- Home performance is going to be used to promote CPC. Maplewood has offered a list with 24,000 names as part of their Community Partner work to promote home performance and CPC. We are also going to contact Info USA for lists which might be used. MQ suggests we look into a "Prius" customer list-a good demographic.
- MQ suggested that we contact the 3000 CORE customers to enlist support.

Additional Comments:

AMM asked CPMs about recent marketing activities and how enrollment was proceeding from their vantage point. That conversation thread had the following major points:

- i. Meg Denney-CEI-says it has been slow but enrollments will pick up now that CPMs have BPU approval on account look up.
- ii. GMEC-John Holtz-said they have done very little other than increase the price as of May 1, 2008. John said that enrollments have been lower than in the past, and also suggested that the electric rate increase in July will also impact enrollment. John mentions that all markets have been slower due to the economic environment.
- iii. AMM asks if we should try to retain customers in these economic times by thanking them for their participation. Meg mentioned that the only way this works in her experience is to include some sort of Sweepstakes, e.g. bed and breakfast stay at a wind farm.
- iv. ACA in Atlantic City or Trump Marina (2007 Leader) both suggested as a possible sweepstake incentives.
- v. Meg says that there is a lot of interest in NJ in CPC and is CEI is interested in promoting it through a Sweepstake. Disclosure mailing which goes mid year might be good opportunity to thank participants.

- vi. John Holtz says he will do the same in the June disclosure label mailing.
  - vii. AMM asked that CPMs take action on thanking participants soon-with the disclosure label or otherwise.
  - viii. Kim Hoff updated on web, indicating a pick up in website activity. John Holtz says they have not seen any particular increase in activity on their web site.
  - ix. AMM noted that the web site is just a source of possible leads for programs, and everyone's job is to convert as many of them as possible into participants.
- AMM asked the CPMs what they consider the most effective means of recognition for participation in the program. J Holtz offered that in TX they found a bumper magnet was very effective. Window decals for the homes and cars also good. Meg Denney says decals have been effective, but have been used now 2-3 times so something new may be needed.
  - AMM asked that CPMs work with Community Partners and utilities interested in promoting CPC. Melissa Standing says that PSEG is willing to promote to employees and suggests that the employee drive be set to run the drive in the fall period as that is more effective, having missed the Spring drive.
  - AMM would like the CPMs to provide marketing plans now that customer account look up is approved. Points discussed included:
    - i. Need for an annual marketing plan (six month plan this year)
    - ii. To be held in confidence.
    - iii. Likely to be required under future rules.
    - iv. Starting now would help all figure out how to structure marketing plan information going forward.
    - v. Meg expressed a lot of support for this idea and wants to get active soon in NJ.
    - vi. Agreed we would review marketing plans at a June meeting.
    - vii. MQ says CRA (Comprehensive Resource Analysis) which sets funding levels for the next 4 years (2009-2012) is in process of approval. Scott Hunter added that the CRA will be approved at the July 9 agenda meeting so there is no longer any time to provide input.
    - viii. AMM-We need more effort from the CPMs now that account look up is approved and that we CPMs should provide input into the EMP. Public stakeholder meetings scheduled for Tuesday May 27<sup>th</sup> in Trenton and Thursday May 29<sup>th</sup> in Newark. Send written comments if you can not make the meetings.

5. 2008 CPC Q-1 Draft Report, Bill Marshall:

- Enrollment is 15,562 active customers vs. from 13,841 EDC. CPM enrollment increase for the quarter is 243.
- Target achievement about .4%
- CPM & EDC energy variation minimal.
- 6,800 people went to the CPC start today page on the web, 357 downloaded an application, and just under 100,000 visited the Clean Energy site in total.
- Meg Denny says they are getting better at determining from their web site if people are coming there from the CleanEnergy web site.
- AMM asked if CPMs have ideas for improving the web site. AMM suggests that they come to June meeting with them.
- 1,118 utility bill inserts received in the call center from April 14 to May 16 this year versus 968 in same period 2007—an increase of about 15%.

Additional Comments:

AMM asked if anyone had any comments on report and reemphasized her earlier point that for this program to continue we need to rapidly double the growth. Up until now all growth has been organic. We need to reevaluate how to accelerate growth.

Walt Davis asked for a clarification regarding the target participation? Originally 2% was the target, why are we speaking about 1%? Who lowered the goal? AMM confirmed that originally we aimed for 2%, but that later was reduced based upon new information and experience. Walt says no one agreed to a reduction, and that original target was a specific target. AMM agrees with Walt and says we need to get going on this. But we need to restructure program to get to 2%. It is only program nationally with three suppliers and four EDCs in one state.

6. Call center training, Bill Marshall:

- Met with team on April 23 to address general training issues
- One thing they want information to help them feel a part of the process. We need to provide them with information about things which are happening which they may get calls about, e.g. price increases, changes in programs (both in resource mix and existence of programs)
- AMM asks if there is some way to increase the number of calls to the CPMs and support CPMs provide to callers. MQ suggests some involvement from CPMs in the call center.
- Discussion about use of e-mail to reach out to CPMs with specific questions. CPMs would like to get e-mails lists from people who call in. Meg Denney clarified that what she was suggesting of e-mail for the customer service reps to reach out to them "real time" more than creating a list of people who want to be contacted by e-mail.
- AMM—our role is to facilitate getting interested people to CPMs.

7. Community Partners Update, Kim Hoff:

- Erin Bijas has left MWW, and Honeywell (Dawn Chaplin's Group) has picked up the role of responding to Community Partners. The Honeywell team is continuing to support Community Partners.
- AMM added Dawn is not responsible for CP. The program launched in 2007 had 20 participants at the end of 2007. It now has 30. We have encouraged all of them to do direct outreach and have sent all of them supporting materials. We have also been supporting their events, including the transit events in May. Idea is to build enrollment in CPC and other programs. We need to get back to them with information on their successes.
- Agreed that reporting to Community Partners will be quarterly with extra reporting in April May, and October and November based upon data going into call center from bill inserts. Report will be sent to Community Partners and the CPC Working Group
- AMM said Honeywell is now managing a broader Community Partner program including outreach for programs beyond CPC and "Change a Light". It is now much broader and is focusing on renewable, residential, and commercial energy programs. Honeywell has always had responsibility for managing a broader program and its communications. Temporarily we don't have a point person from Grafica or MWW at the moment, but all support going forward is from Honeywell and the Market Managers.

## 8. Action Items

- June 20 mandatory meeting 10:00-1:00 for EDCs and CPMs at CSG offices in Iselin to discuss strategic changes to CPC program. Agenda items to include:
  - Annual report recommendations for Program changes
  - CPM marketing plans
  - Web site review
  - Call center strategies and FAQ's

AMM emphasizes this meeting is strategic, not tactical, about program design about how to move us to the 2% enrollment goal and how we should use the existing program to meet EMP goals. That is the focus of the meeting.

- Tentative account look up teleconference at 10:00 on June 4<sup>th</sup> once we have written board approval for account look up.