

**SoCalGas Advanced Metering Initiative (AMI)  
 Technical Advisory Panel (TAP)  
 Meeting Summary**

**September 9, 2010**

**10:00 a.m. – 2:00 p.m.**

The Gas Company Tower – Conference Room 2C (2<sup>nd</sup> Floor)

555 West 5<sup>th</sup> Street

Los Angeles, CA 90013

Call-in Number and Web Meeting capability provided for remote participants

**Attendees:**

<b>TAP Members</b>	In Person: Greg Ennis (Wi Fi Alliance); Erin Pak (Korean Health Education Information and Research Center); Mark Gaines (SoCalGas Customer Programs)  Via Phone: Belinda Gatti (Energy Division); Sommer Harvey (CPUC Business and Community Outreach); Dave Hungerford (CEC); Tom Roberts (Division of Ratepayer Advocates)
<b>Advanced Meter Team</b>	In Person: Pat Petersilia (Advanced Meter Director); Lizette Verduzco (Stakeholder Education & Outreach Manager); Trisha Muse (Customer Experience Manager); Mario Aguirre (Installation Manager); Dave Mercer (Technology Manager); Chris Olmsted (IT Manager)
<b>SoCalGas</b>	In Person: Patti Wagner (VP of IT); Mike Schneider (VP of Customer Operations); John Guerra (Regional Public Affairs); Greg Healy (Regulatory); Sara Franke (Labor Relations)
<b>Additional Attendees</b>	In Person: Drisha Melton (CPUC Business and Community Outreach); Steve George (Freeman, Sullivan & Co); Rick Riccardi (Aclara); Nancy Logan (UWA local 132); Lisa Alexander (Van Denburgh Consulting); Elizabeth Van Denburgh (Van Denburgh Consulting)  Via Phone: Chris Danforth (Division of Ratepayer Advocates); Roland Esquivas (CPUC Business and Community Outreach); John Roldan (CPUC Business and Community Outreach)
<b>Not in Attendance</b>	Forescee Hogan-Rowles (Community Finance Resource Center), Frank Villalobos (Barrio Planners Incorporated); Rick Hobbs (SoCalGas Director of Customer Assistance)

**Meeting Objectives:**

On September 9<sup>th</sup>, SoCalGas held the first meeting with the Technical Advisory Panel (TAP). The objectives of the meeting were to:

- **Provide** an overview of the advanced meter project and participation as a member of the TAP
- **Share** the preliminary advanced meter customer outreach & conservation support plan
- **Obtain** feedback to update what will be an evolving plan

**Welcome: Patti Wagner, VP of IT**

*Highlights*

SoCalGas is the last of California utilities to implement AMI. The company will be looking forward to applying both the successes and the lessons learned of the other IOUs. Success depends on how well the customer experience is managed, and SoCalGas looks forward to the TAP providing input on customer engagement, specifically on the program itself. SoCalGas hopes that the TAP will stay for the duration of the implementation. Specific areas SoCalGas would like the TAP's input:

- Customer communications
- Community outreach

- Energy and conservation strategies

#### *About the Technical Advisory Panel*

Introductions were made including both in-person attendants as well as telephone participants. TAP Charter and Roles & Responsibilities were reviewed. Key points included:

- The TAP was asked to keep their “expert hats on”, but to also bring their perspective as a utility customer in terms of how they would like to be communicated with, whether the program proposals are realistic and interesting, etc.
- SoCalGas looks forward to the TAP’s collaboration on problems, and hopes the TAP will share their bird’s eye view of other implementations and bring lessons learned as well as their own ideas, particularly in the areas of conservation and communications
- SoCalGas would like the TAP to stay intact through 2017

#### **Advanced Meter Project Overview – Pat Petersilia, Director of Advanced Meter**

##### *Highlights*

Overview of the SoCalGas Advanced Meter Project was provided. Key points included:

- The utility aims to leverage SDG&E’s best practices as they relate to customer experience. To date, their implementation has been successful.
- SoCalGas has done some original work towards planning the customer experience, but we are in the early stages of the project and there are many decisions to be made. SoCalGas looks forward to coordinating with the TAP and communities over the next 18 month to plan for a preliminary rollout in mid/late 2012, and commencement of mass deployment in 2013.
- If SoCalGas is not achieving conservation target, then the utility will need to revamp its efforts until the targets are achieved. SoCalGas looks forward to working with the TAP to collaborate on strategies for achieving the conservation goal.
- Unique to the other California IOUs, SoCalGas is challenged to provide near-real time information on gas usage and prices concurrently with installation.
- The advanced meter technology is a known technology. SoCalGas is fourth in California. However, no one has implemented on the scale SoCalGas is proposing, and no one’s done it on this scale for gas-only.
- The customer benefits of the Advanced Meter Project include more immediate information, and the associated enablement to make more intelligent decisions about how to reduce gas usage. Additionally, privacy and security due to meter readers no longer needing access; collective benefits from conservation and lower CO2 emissions; and platform for potential smart appliances in the future. Additionally, operational savings will be passed on to customers.
- SoCalGas understands the concerns about RF in some parts of the state; the utility is in the process of developing our background info on this important subject.
- SoCalGas Meter accuracy: will have processes and testing in place for due diligence so as not to repeat problems that have occurred elsewhere.
- The installation footprint and dates are not defined yet. There may be multiple installation sites at any given time. We anticipate having a rough plan for the early years of deployment developed in 2011. Currently, it is expected that by the end of 2012, roughly 10,000 meters will be installed for the purpose of testing the technology, processes and customer experience. By Q1 2013, mass installation is targeted to begin. 2011 is about building a strong foundation and getting good plans in place, to build on as rollout commences.

## **Customer Experience & Outreach – Lizette Verduzco, Stakeholder Education & Outreach Manager and Trisha Muse, Customer Experience Manager**

### *Highlights*

Provided overview of the CPUC-required public workshop in-progress content for the draft customer experience and outreach plan to be presented at the workshop. Key points included:

- The draft plan is just that, a draft. It is designed to elicit constructive feedback from SoCalGas' communities in the public workshop, and from the TAP. It is still very early in the process, and the utility expects that the plan will evolve over the next 18 months. The utility looks forward to TAP feedback as the plan unfolds in the coming months.
- The draft plan that will be submitted to the CPUC will not be a plan like you might see in a formal Energy Efficiency or Demand Response filing. It is too early to plan at that level. For example, you will not see detailed messaging or a detailed tactical marketing plan in the draft.
- The TAP was asked to help promote and secure attendance for the October 4 public workshop. SoCalGas has drafted an email invitation that TAP members are encouraged to forward, and the utility hopes the TAP will help by encouraging its contacts to attend, in order to get a strong representation of the service territory.
- SoCalGas provided an overview of key components of the customer experience and outreach plan, including: guiding principles; plan objectives; target audiences; three-phase communications strategy; and ongoing customer feedback loop. [These are available in detail in the meeting presentation document.] The TAP was encouraged to interject, ask questions and provide feedback through the discussion.
- SoCalGas recognizes the diversity of its service territory and is in the process of determining the most efficient and effective ways to tailor communications languages for each community. The Advanced Meter initiative footprint will also inform plan timing and the opportunities for SoCalGas to "hook into" key community events.
- Regarding conservation, SoCalGas is balancing how to touch customers in an equitable way, and to maximize that, but also how to focus select efforts on customers who have the highest potential or likelihood to contribute to conservation. The utility looks forward to the TAP's guidance in finding this balance. Online presentment of gas usage data is one feature of the Advanced Meter Initiative that is available to all customers.

### **Next Steps**

- SoCalGas provided invitation to 10/4 public workshop. TAP members to distribute to key contacts to help drive attendance.
- TAP members to provide any additional comments to the customer experience and outreach plan by September 17.
- SoCalGas to schedule next TAP meeting for week of 11/1
- Suggestion: future TAP meeting may address HAN options for gas (i.e. Star USI, Zigbee, how it all may work given water, gas, electric all going to home.)
- Review Structure report