



## Clean Power Alliance Administrative Policies and Procedures

Policy Title	CPA Privacy and Customer Confidentiality Policy		
Policy Number	CPA2018-02	Effective Date:	06/07/2018
Reference:	CPUC Decision 97-10-031		

### 1.0 Definition of Terms

#### 1.1 California Public Utilities Commission (CPUC)

A regulatory agency that regulates privately owned public utilities in the state of California, including electric power, telecommunications, natural gas and water companies.

#### 1.2 Policy

#### 1.3 Notice of Accessing, Collecting, Storing, Using, and Disclosing Energy Usage Information

Clean Power Alliance (CPA), its employees, agents, contractors, and affiliates shall maintain the confidentiality of individual customers' names, service addresses, billing addresses, telephone numbers, email addresses, account numbers, and electricity consumption, except where reasonably necessary to conduct CPA's business or to provide services to customers as required by the California Public Utilities Commission (CPUC). Examples of reasonably necessary business purposes include but are not limited to when such disclosure is necessary to (a) comply with law, regulation, or court order; (b) enable CPA to provide services to its customers; (c) collect unpaid bills; (d) obtain and provide credit reporting information; (e) resolve customer disputes or inquiries; (f) communicate about demand response, energy efficiency, energy management, and conservation programs, or (g) in situation of imminent threat to life or property. CPA shall not, under any circumstances, disclose customer information for third-party telemarketing, e-mail, or direct mail solicitation. Aggregated data that cannot be traced to specific customers may be released at CPA's discretion.

Customer data, including individual customer names, addresses, and electric energy usage data, is collected via Southern California Edison's metering systems. CPA may

share customer data with contractors and vendors for purposes of providing services and operating programs. Contractors and vendors are required to agree to only use customer data for program operational purposes and protect it under the same standards as CPA maintains customer-specific energy usage and billing information for only as long as reasonably necessary, typically not more than five years unless otherwise necessary by law or regulation.

The effective date of this version of the Privacy and Consumer Confidentiality Policy is June 7, 2018. Notice of this policy will be provided when confirming a new customer account and annually to customers via an on-bill message to guide customers to the most updated version of CPA's website at [www.CleanPowerAlliance.org](http://www.CleanPowerAlliance.org). Any changes to this policy between notification periods will be communicated through CPA's website.

Customers having any questions or concerns regarding the collection, storage, use, or distribution of customer information, or who wish to view, inquire about, or dispute any customer information held by CPA or limit the collection, use, or disclosure of such information, may contact Tyler Aguirre, by phone at (213) 269-5870, via email at [taguirre@cleanpoweralliance.org](mailto:taguirre@cleanpoweralliance.org) or by mail at 555 W. 5th Street, 35th Floor, Los Angeles, CA, 90013.

**CLEAN POWER ALLIANCE OF SOUTHERN CALIFORNIA (CPA)  
PRIVACY AND CUSTOMER CONFIDENTIALITY  
POLICY ACKNOWLEDGEMENT**

I have read the Privacy and Customer Confidentiality Policy and understand its provisions.

I understand that to ensure the protection of the integrity of CPA's confidential information as well as the confidentiality of others, confidential information may not be shared with unauthorized individuals within or outside of the organization and may not be transmitted via email.

I accept responsibility for any action performed under my user name and password, or as a representative of CPA.

I understand that handling and use of confidential information in violation of the Privacy and Customer Confidentiality Policy may result in employee discipline, up to and including termination and/or termination of roles, responsibilities, contracts, or agreements.

By signing this form, I agree to abide by the policy currently in place and I agree to review periodically any changes or modifications. I understand that my regular review of this policy is required. I understand updates to this policy are available online.

Name  
(Print): \_\_\_\_\_

Emp. ID  
(If applicable): \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Executive Director  
Signature: \_\_\_\_\_

Date: \_\_\_\_\_

This document will be maintained in CPA's files.