

AGENDA

ORANGE COUNTY POWER AUTHORITY REGULAR MEETING OF THE BOARD OF DIRECTORS

**Monday, March 9, 2026
2:00 p.m.**

This meeting will proceed as an in-person meeting at **15310 Barranca Parkway, Suite 250, Irvine, CA 92618**. In addition, as a convenience to the public, the Orange County Power Authority is also providing an option for members of the public to remotely view and participate in the meeting. Further details are below. Please note that, in the event of a technical issue causing a disruption in the remote participation option, the meeting may continue unless otherwise required by law.

Public Comments: Any member of the public may provide comments to the Orange County Power Authority Board of Directors on any agenda items by requesting to speak during Item 4, or on any matter not appearing on the agenda but within the jurisdiction of the Board by requesting to speak during Item 5. When providing comments to the Board, it is requested that you provide your name and city of residence for the record. Commenters are requested to address their comments to the Board as a whole through the Chair. Comments may be provided in the following manner:

To provide comments during the meeting, in-person attendees, please fill out the public speaker slip and provide it to the clerk at the beginning of the meeting. Before Items 4 and 5, the Chair or Clerk will ask members of the public to join the queue to provide public comment. The queue will remain open for a reasonable amount of time to allow members of the public sufficient time to request to speak and inform the Board of the number of speakers. After such time, the queue will be closed and the members of the public who have joined the queue to speak will be recognized at the appropriate time may speak. To join the queue on Zoom video conference by computer or mobile phone, use the "Raise Hand" feature. If joining the meeting using the Zoom dial-in number, you can raise your hand and join the queue by pressing *9. Members of the public will not be shown on video but will be able to speak when called upon.

Comments shall generally be limited to three minutes when speaking, provided that the Chair may equally reduce each speaker's time to accommodate a large number of speakers or a large number of agenda items.

Written Communications: If you have a written communication that you wish to be distributed to the Board, please provide it via e-mail to comments@ocpower.org. Written communications are public records and, if received by 5:00 p.m. on the day prior to the meeting, will be distributed to the Board prior to the meeting by either e-mail or hard-copy, posted on the Authority's website and noted, but not read, at the meeting. Communications received after the 5:00 p.m. deadline will be retained in the Authority's records.

The public may participate using the following remote options:

ZOOM WEBINAR

Please click the link below to join the webinar:

[Launch Meeting - Zoom](#)

Dial-in: 1-669-900-6833

Webinar ID: 836 7715 1825

1. **CALL TO ORDER**

2. **PLEDGE OF ALLEGIANCE**

3. **ROLL CALL**

4. **PUBLIC COMMENTS ON AGENDA ITEMS**

Opportunity for members of the public to address the Board on any items on the agenda.

5. **PUBLIC COMMENTS ON NON-AGENDA ITEMS**

Opportunity for members of the public to address the Board on any items not on the agenda but within the jurisdiction of the Board.

6. **DIRECTOR ANNOUNCEMENTS & REPORTS ON CONFERENCES/EVENTS ATTENDED**

Board Members may briefly provide information to other members of the Board and the public, ask questions of staff, or report on conferences, events, or activities related to Authority business. There is to be no discussion or action taken on comments made by Board Members unless authorized by law.

7. **CONSENT CALENDAR**

All items listed under the Consent Calendar are considered to be routine and may be enacted by one motion. Prior to the motion to consider any action by the Board of Directors, any public comments on any of the Consent Items will be heard. There will be no separate action unless members of the Board of Directors request specific items be removed from the Consent Calendar.

1. **MINUTES FOR THE REGULAR BOARD MEETING OF FEBRUARY 9, 2026**

Recommended Action:

Approve as submitted.

2. **COMMUNITY ADVISORY COMMITTEE (CAC) REPORT**

Recommended Action:

Receive and file.

3. **LEGISLATIVE AND REGULATORY UPDATE**

Recommended Action:

Receive and file.

4. **STRATEGIC PLAN MONTHLY STATUS REPORT**

Recommended Action:

Receive and file.

5. PUBLIC OUTREACH UPDATE FOR JANUARY- FEBRUARY 2026

Recommended Action:

Receive and file.

6. TREASURER'S REPORT – FISCAL YEAR ENDED DECEMBER 31, 2025 AND Q4 2025 CHECK REGISTER

Recommended Action:

Receive and file.

7. APPROVE BOARD OF DIRECTORS COMPENSATION/REIMBURSEMENT POLICY UPDATE

Recommended Action:

Approve amendments to Policy No. 5, Board of Directors and Community Advisory Committee Members Compensation and Expense Reimbursement Policy, to clarify that Board reimbursement may include mileage to and from Board meetings, committee meetings, and other compensable activities, and to simplify language relating to the amount of Board compensation.

8. PUBLIC RECORDS ACT QUARTERLY REPORT

Recommended Action:

Receive and file.

8. REGULAR CALENDAR

The following items call for discussion or action by the Board of Directors. The Board may discuss and/or take action on any item listed below if the Board is so inclined.

1. APPROVE FISCAL YEAR 2025-26 MID-YEAR BUDGET AMENDMENT

Recommended Action:

Approve Fiscal Year 2025-26 Mid-Year Operating Budget Amendment, as proposed in Attachment 1.

2. RENTER ENERGY EFFICIENCY PROGRAM

Recommended Action:

Receive and file.

9. STAFF REPORT

Staff may briefly provide information to the Board and the public. The Board may engage in discussion if the specific subject matter of the report is identified, but the Board may not take any action. There is to be no other discussion or action taken unless authorized by law.

10. **ADJOURNMENT**

Compliance with the Americans with Disabilities Act

Board of Directors meetings comply with the protections and prohibitions of the Americans with Disabilities Act. Individuals with a disability who require a modification or accommodation, including auxiliary aids or services, in order to participate in the public meeting may contact 949-263-2612. Requests for disability-related modifications or accommodations require different lead times and should be provided at least 72-hours in advance of the public meeting.

Availability of Board Documents

Copies of the agenda and agenda packet are available at www.ocpower.org. Late-arriving documents related to a Board meeting item which are distributed to a majority of the Board prior to or during the Board meeting are available for public review as required by law. Public records, including agenda-related documents, can be requested electronically at clerk@ocpower.org or by mail to 15642 Sand Canyon Avenue, P.O. Box 54283, Irvine, CA 92619-4283. The documents may also be posted at the above website. Such public records are also available for inspection, by appointment, at 15310 Barranca Parkway, Suite 250, Irvine, CA 92618. Please contact clerk@ocpower.org to arrange an appointment.



**MINUTES
REGULAR MEETING
BOARD OF DIRECTORS
ORANGE COUNTY POWER AUTHORITY**

Monday, February 9, 2026

1. CALL TO ORDER

Chair Sonne called to order the Regular Meeting of the Orange County Authority Board of Directors at 2:01 p.m. on Monday, February 9, 2026.

2. PLEDGE OF ALLEGIANCE

Vice Chair Mai led the Pledge of Allegiance.

3. ROLL CALL

Present:	Director Glenn Grandis	City of Fountain Valley
	Director Fred Jung	City of Fullerton (arrived at 2:04 p.m.)
	Director Kathleen Treseder	City of Irvine
	Vice Chair James Mai	City of Irvine
	Chair Susan Sonne	City of Buena Park

Absent: None.

4. PUBLIC COMMENTS ON AGENDA ITEMS

None.

5. PUBLIC COMMENTS ON NON-AGENDA ITEMS

Vicki Johnson and Mike Rough, City of Laguna Woods residents, commented on OCPA and Southern California Edison 2026 rate differences.

6. DIRECTOR ANNOUNCEMENTS

Director Grandis mentioned the City of Fountain Valley, their staff, and himself have discussed with OCPA and determined a move from a launch in October 2026 to April 2027 would be most appropriate at this time. Director Grandis also wanted to clarify that no power has been purchased for the City of Fountain Valley.

7. CONSENT CALENDAR

Moved by Director Jung, seconded by Vice Chair Mai to:
Approve consent calendar 7.1 – 7.7.

The motion carried unanimously by the following 5-0-0 vote:

Ayes: Director Grandis, Director Jung, Director Treseder, Vice Chair Mai,
Chair Sonne
Noes: None
Absent: None

1. MINUTES FOR THE REGULAR BOARD MEETING OF JANUARY 12, 2026

Action Taken:

Approved as submitted.

2. MINUTES FOR THE SPECIAL BOARD MEETING OF JANUARY 26, 2026

Action Taken:

Approved as submitted.

3. COMMUNITY ADVISORY COMMITTEE REPORT

Action Taken:

Received and filed.

4. LEGISLATIVE AND REGULATORY UPDATE

Action Taken:

Received and filed.

5. STRATEGIC PLAN MONTHLY STATUS REPORT

Action Taken:

Received and filed.

6. UPDATE ANNUAL ENERGY USAGE AND VOTING SHARES

Action Taken:

Approved update to the weighted voting exhibits of OCPA's Joint Powers Agreement.

7. APPOINTMENT OF ONE AT-LARGE MEMBER TO THE COMMUNITY ADVISORY COMMITTEE

Action Taken:

Appointed one at-large member to the Community Advisory Committee (CAC) as identified in the staff report.

8. REGULAR CALENDAR

1. APPROVE EDISON ELECTRIC INSTITUTE MASTER AGREEMENT AND CONFIRMATION WITH CLEAN ENERGY ALLIANCE

Director of Power Resources Louis Ting presented the item along with Energy Contracts & Compliance Analyst Lena Garvey seeking Board approval to execute an Edison Electric Institute (EEI) Master Power Purchase and Sale Agreement and a ten-year Confirmation with the Clean Energy Alliance (CEA). He said these documents collectively form the Voluntary Allocation and Market Offer (VAMO) Agreements and enable OCPA to participate in the energy prepayment transaction.

Moved by Director Jung, seconded by Vice Chair Mai.

The motion carried unanimously by the following 5-0-0 vote:

Ayes: Director Grandis, Director Jung, Director Treseder, Vice Chair Mai,
Chair Sonne,
Noes: None
Absent: None

2. COMMUNITY POWER PLAN

Director of Communications and External Affairs Jacquie Henderson presented the item along with The Energy Coalition's Code Bruder. They share that the Community Power Plan is OCPA's roadmap for bringing more clean, reliable, and affordable energy programs to the people and businesses we serve. It was built with extensive community input and is designed to make sure OCPA programs meet real needs, especially for renters, small businesses, and income-qualified households. They discussed the purpose, background, development process, program intervention recommendations, and next steps.

The Board members discussed the impact and feasibility, priority level, funding, and community needs.

Moved by Director Jung, seconded by Chair Sonne, to approve the Community Power Plan (CPP) for adoption and implementation.

The motion carried unanimously by the following 4-0-1-0 vote:

Ayes: Director Jung, Director Treseder, Vice Chair Mai, Chair Sonne,
Noes: None
Abstain: Director Grandis
Absent: None

3. DIABLO CANYON POWER PLANT OVERVIEW

Regulatory and Legislative Manager Steven Halligan presented the item which provided the Board with an overview of Diablo Canyon Power Plant (DCPP), the policy landscape surrounding its potential future extension, and the implications for OCPA customers.

Received and filed.

4. APPOINTMENT OF BOARD DIRECTORS TO STANDING COMMITTEES

Interim Board Clerk Lisette Chel Walker prompted the discussion of appointments to Board committees since the Board makeup had changed since the the January meeting when it was last discussed.

After discussion and consideration, Chair Sonne selected:

Director Treseder and herself were selected to serve on the Legislative and Regulatory Committee for 2026.

Vice Chair Mai and Director Grandis were selected to serve on the Marketing and Communications Committee for 2026.

The motion carried unanimously by the following 5-0-0-0 vote:

Ayes:	Director Jung, Director Treseder, Vice Chair Mai, Chair Sonne, Director Grandis
Noes:	None
Abstain	None
Absent:	None

5. BOARD OF DIRECTORS MILEAGE REIMBURSEMENT DISCUSSION

Director Jung presented the item and requested consideration of mileage reimbursement for board members attending Orange County Power Authority-related meetings and events.

Moved by Director Jung, seconded by Chair Sonne, to direct staff to update the Board-approved policy and bring it back in March for approval.

The motion carried unanimously by the following 5-0-0 vote:

Ayes:	Director Grandis, Director Jung, Director Treseder, Vice Chair Mai, Chair Sonne
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Noes: None
Absent: None

6. FORMATION OF AN AD HOC COMMITTEE ON JOINT POWERS AGREEMENT AMENDMENTS

Vice Chair Mai presented the item and is requesting that the Board form an Ad Hoc Committee to review and recommend amendments to the Orange County Power Authority Joint Powers Agreement (JPA). He said one amendment he would like evaluated is whether the City of Irvine should continue holding two Board seats beyond 2026. Mai said the current two-seat structure is tied to the Irvine Capital Loan, which will be fully repaid by the end of this year. His request for the committee is to consider whether extending the two-seat arrangement is appropriate.

Moved by Chair Sonne, seconded by Vice Chair Mai, to select Director Jung and Vice Chair Mai to serve on the Ad Hoc Committee to review and recommend amendments to the Orange County Power Authority Joint Powers Agreement (JPA).

The motion carried unanimously by the following 5-0-0 vote:

Ayes: Director Grandis, Director Jung, Director Treseder, Vice Chair Mai,
Chair Sonne
Noes: None
Absent: None

9. STAFF REPORT

CEO Joe Mosca confirmed that OCPA has been in contact with the City of Fountain Valley, Southern California Edison, and the California Public Utilities Commission on the deferred launch date. CEO Mosca also referred the Board to his full staff report in the agenda packet for more updates.

10. ADJOURNMENT

With no further business to come before the Board, Chair Sonne adjourned the February 9, 2026, Orange County Power Authority Board Regular meeting at 3:38 p.m.

Chair Sonne noted that the next Orange County Power Authority Board Regular meeting will be held on Monday, March 9, 2026, at 2:00 p.m.

Submitted by:

Lisette Chel Walker, Interim Board Clerk

**ORANGE COUNTY POWER AUTHORITY
Staff Report – Item No. 7.2**

To: Orange County Power Authority Board of Directors

From: Jacquie Henderson, Director of Communications & External Affairs
Andrew Di Giovanna, External Affairs Manager
Linda Kraemer, Community Engagement Manager

Approved By: Joe Mosca, Chief Executive Officer

Subject: COMMUNITY ADVISORY COMMITTEE (CAC) REPORT

Date: March 9, 2026

STRATEGIC GOALS

- Enrich & Grow the OCPA Community: _____
- Prioritize Fiscal Sustainability & Affordability: _____
- Design & Deploy Community-Aligned Customer Programs: _____
- Energize Our Community with Renewable Energy: _____
- Raise Awareness of Community Energy & Advocate for Our Customers: _____
- Not Applicable: _____

RECOMMENDED ACTION(S)

Receive and file.

BACKGROUND

On Monday, March 2, 2026, at 6:00 p.m., the Community Advisory Committee (CAC) held its regular monthly meeting. The meeting agenda included presentations on an OCPA Community Grants recipient, implementation of the recently adopted Community Power Plan, bill reduction and affordability programs, upcoming public engagement activities, and the annual appointment of CAC officers. The meeting provided an opportunity for CAC members to receive timely updates on program implementation, affordability initiatives, community engagement efforts, and organizational governance.

DISCUSSION/ANALYSIS

The CAC regular meeting on March 2, 2026, included the following presentations and updates:

Report from an OCPA Community Grants Recipient

The Committee received a presentation highlighting the impact of OCPA's Community Benefits Grant, awarded in partnership with Calpine Community Energy. Staff provided background on the Community Grants Program, which supports nonprofit organizations advancing clean energy, sustainability, and community resilience. The featured grantee, the California Green Business Network (CGBN), is utilizing grant funding to support the City of Irvine Green Business Program by providing rebates of up to \$500 for approximately 12 to 15 small- to medium-sized businesses pursuing energy efficiency or sustainability improvements.

In addition to rebate support, CGBN provides technical assistance to participating businesses to help them achieve green certification by completing measures related to energy efficiency, pollution prevention, waste diversion, and water conservation. The presentation demonstrated how OCPA reinvests revenues into member communities through targeted, locally beneficial programs.

Community Power Plan and Programs Update

Staff presented an update on the Community Power Plan, which was adopted by the OCPA Board of Directors on February 9, 2026, following prior CAC feedback and a public review period. The Plan establishes a structured framework for long-term program development based on community needs, operational alignment, evaluation of existing programs, funding opportunities, and cost-benefit considerations. Based on this analysis, comprehensive energy efficiency and electrification programs and direct-to-renter electrification initiatives were identified as high-priority categories.

Staff provided an overview of the first high-priority initiative, the OCPA Renter Energy Efficiency + Battery Storage program. Demographic data presented to the Committee reflect that renters comprise a significant share of residents across member cities, ranging from 34 percent in Fountain Valley to 55 percent in Irvine. The program is designed to address common renter barriers, including landlord approval constraints and upfront equipment costs.

Through a \$650,000 allocation in the Fiscal Year 2025-26 budget, approximately 170 eligible renter households will receive a portable heat pump and portable battery system at no cost. The equipment allows for room-by-room heating and cooling and supports peak-hour load shifting without requiring permanent installation. Applications will be submitted through OCPA's website, with priority given to customers enrolled in CARE, FERA, or Medical Baseline programs.

Program evaluation will include pre- and post-participation surveys and, where consent is provided, analysis of utility data to assess usage patterns, comfort outcomes, and peak-hour impacts. Staff also highlighted complementary education initiatives under development, including a mobile BuildSMART Trailer energy efficiency showcase, an online Energy Education Webinar scheduled for April 2026, and the next Bright Futures Grant funding round opening in May 2026.

Overview of CARE, FERA, and Bill Reduction Support

The Committee received an overview of California's CARE and FERA programs, along with other bill reduction and assistance resources. Staff emphasized OCPA's ongoing outreach efforts to educate customers about available assistance programs administered through Southern California Edison and the State of California. Multilingual educational materials are distributed at community events, and a dedicated bill assistance webpage is maintained on OCPA's website to centralize resources and application information. Staff also highlighted the availability of 211 Orange County as an additional referral resource for housing and utility assistance.

The Green Discount Program, scheduled to launch in spring 2026, was noted as an upcoming OCPA initiative to provide eligible customers with additional affordability options. The presentation reinforced OCPA's continued focus on energy equity and customer awareness.

Public Engagement for March and April 2026

Staff provided an overview of planned public engagement activities for March and April 2026. Upcoming engagements include participation in city-hosted events, business forums, educational programs, and community celebrations across member jurisdictions. Events include the Costa Mesa Women of the Year Event, the Irvine 2026 State of the City, Buena Park Middle School Career Night, the Irvine Women in Tech Symposium, Irvine Electrification 101 where OCPA will serve as a featured speaker, the Anaheim Estrella Awards, and the Irvine Earth Day Event. These activities support OCPA's objectives of increasing public awareness, strengthening relationships with community stakeholders, and promoting clean energy education.

Appointment of CAC Chair and Vice Chairs

As part of its annual organizational process, the Community Advisory Committee conducted elections for Chair and Vice Chairs. The Committee reappointed Chair Dominic Bendinelli and First Vice Chair Shanin Ziemer to serve an additional term. Member Doug Elliott was selected to serve as Second Vice Chair, replacing former Irvine CAC Member Melisa Masri, who had previously held that position. These appointments provide continuity in leadership while supporting the Committee's ongoing advisory role to the Board.

Updates from Staff

Staff provided a monthly update covering communications, legislative engagement, and community outreach activities. Communications efforts continued to focus on reinforcing OCPA's 2026 rate stability message, including a CEO blog post distributed through the agency newsletter and social media channels, updates to the Residential Rates webpage featuring plan comparisons, and expanded

FAQs addressing the Power Charge Indifference Adjustment (PCIA). An explainer video is in production and will be added to OCPA's website and YouTube channel to further clarify rate components and customer options. Staff also noted that community conversations regarding rate stability took place in January and February, with additional discussions scheduled.

Staff highlighted OCPA's continued engagement in state and regulatory matters impacting clean energy and customer affordability. In 2025, OCPA participated in more than 20 meetings with state legislators, monitored over 30 regulatory proceedings, and tracked approximately 120 pieces of legislation related to energy policy. These efforts support OCPA's role in advancing clean energy objectives while advocating for rate stability and customer protections.

Community engagement activities during the month included participation in Lunar New Year celebrations across multiple member cities, including Irvine's inaugural Lunar New Year Parade and Festival and the Asian Business Association of Orange County luncheon. These events provided opportunities to connect directly with residents and business leaders, share program information, and reinforce OCPA's commitment to inclusive, community-centered outreach.

FISCAL IMPACT

None

ATTACHMENT(S)

None

**ORANGE COUNTY POWER AUTHORITY
Staff Report – Item 7.3**

To: Orange County Power Authority Board of Directors

From: Steven Halligan, Regulatory and Legislative Manager
Matt Chill, Regulatory Analyst

Approved By: Joe Mosca, Chief Executive Officer

Subject: LEGISLATIVE AND REGULATORY UPDATE

Date: March 9, 2026

STRATEGIC GOALS

- Enrich & Grow the OCPA Community: _____
- Prioritize Fiscal Sustainability & Affordability: _____
- Design & Deploy Community-Aligned Customer Programs: _____
- Energize Our Community with Renewable Energy: _____
- Raise Awareness of Community Energy & Advocate for Our Customers: _____
- Not Applicable: _____

RECOMMENDED ACTION

Receive and file.

BACKGROUND

Orange County Power Authority (OCPA) staff actively participate in several regulatory proceedings at the California Public Utilities Commission (CPUC), California Independent System Operator (CAISO), California Air Resources Board (CARB), South Coast Air Quality Management District (SCAQMD), and the California Energy Commission (CEC). A summary of high priority, active proceedings is provided below. Staff also track and analyze bills in the California Legislature and in Congress. A summary of legislative activities and bills is included below.

ANALYSIS AND DISCUSSION

California Legislative Update

The California Legislature reconvened on January 5, 2026, and the Legislature’s deadline to introduce bills was February 20. OCPA has identified 115 bills to analyze and track. A summary of all 115 bills is included as Attachment 1.

Notably, CalCCA's sponsored Resource Adequacy (RA) Transactability legislation was introduced by Senator Padilla (Senate Bill (SB) 1138)) and CalCCA's Power Charge Indifference Adjustment (PCIA) data disclosure legislation was introduced by Assemblymember Rogers (Assembly Bill (AB) 1761). Fact sheets are included as attachments 2 and 4. OCPA has submitted letters of support for both pieces of legislation to the respective Committees and to the Orange County delegation of legislators (Attachments 3 and 5).

SB 1138 would require the CPUC to permit Load Serving Entities (LSEs) to trade RA obligations to each other up to 25% of their total compliance obligations. Such a modification furthers the intent of the Slice of Day RA framework to enable greater systemwide efficiency and cost savings within the RA program.

AB 1761 would require all data used to inform the PCIA calculation and other rate elements be made available to LSEs and ratepayer advocates on behalf of impacted customers. The earliest the legislation may be heard in committee is on March 12, 2026.

OCPA signed onto a joint letter to the Governor and key legislators requesting budget support to sustain the TECH Clean California program, which provides a valuable offering that provides financial support to households as they transition away from fossil-powered appliances to electric technologies such as heat pumps. As of January 2026, the TECH program has supported the installation of nearly 63,000 heat pumps, and it is important to maintain this availability for California residents, including OCPA customers.

The Assembly Utilities and Energy Committee held a hearing on February 18 to review statewide progress on clean energy deployment and a hearing on February 25 to review the outcomes of AB 2316 (Ward, 2022) regarding customer renewable energy subscription programs and the community renewable energy program.

Regulatory Update

California Public Utilities Commission Updates

Power Charge Indifference Adjustment (PCIA) Proceeding – R.25-02-005

Background: On February 11, 2025, the CPUC issued an Order Instituting Rulemaking (OIR) to initiate a new proceeding related to the Power Charge Indifference Adjustment (PCIA). The proceeding consists of two tracks. The first track was an expedited track focused on potential modifications to the Market Price Benchmark (MPB). Track two considered several issues including a review of the revisions to the MPB, consideration of ERRA-specific implementation guidance for RA program changes, changes to Bundled Procurement Plan directions, and consideration of improved PCIA and ERRA mechanisms to reduce rate volatility.

The Track 1 PD was approved at the June 26, 2025, CPUC Voting Meeting. The Track 1 PD states:

- The current RA MPB methodology examines a three-year dataset to determine the local RA MPB forecast, adding a fourth year to the dataset for the final local RA MPB. Adjusting the methodology to a single RA MPB calculation, utilizing system, flexible, and local RA procurement data from the three- and four- year datasets, allows for the consideration of more transaction data.

- Combining the three MPBs into a single MPB with three years of data for forecast MPBs and an additional year of data for final MPBs appropriately balances data sufficiency with the Commission’s currently established method of valuing RA portfolios based upon short-run market prices.
- The RA MPB should be based upon competitive market pricing that reflects supply and demand dynamics.
- Affiliate and swap transactions reflect considerations other than market-based supply and demand pricing of the resources involved in the transaction.
- Inclusion of affiliate and swap transactions in the RA MPB calculation introduces the potential for manipulation of the RA MPB.
- Transactions between the PG&E CPE and PG&E LSE, as well as transactions between the SCE CPE and SCE LSE are subject to independent verification that ensures transaction values reflect competitive pricing.
- Sleeve transactions involve multiple transactions based involving the same resource and single market-based price. Considering each transaction within a sleeve as a separate transaction in the RA MPB calculation results in the overweighting of a single price determination within the transaction dataset and distorts the RA MPB.
- The changes adopted should be applied to the calculation of the 2025 Final and 2026 Forecast RA MPB and all succeeding forecast and final MPB calculations.

On July 28th, 2025, CalCCA filed an Application for Rehearing (AfR) on Track 1 of the proceeding. This AfR addressed CCA opposition for the CPUC’s engagement with retroactive ratemaking in the MPB calculation methodology for the 2025 ERRRA True Up, which is prohibited under Section 728 of the Public Utilities Code. On October 31, 2025, the Commission issued an Order Denying CalCCA’s Application for Rehearing of the Track 1 decision regarding RA MPB calculations.

On December 1, 2025, CalCCA requested that the Court grant the Petition for Review of D.25-06-049 and reverse the Decision on the grounds that (1) the Decision violated the prohibition against retroactive ratemaking; and (2) the Decision’s retroactive application to 2025 rates was not supported by adequate findings or substantial evidence in the record.

Update: The CPUC filed a Scoping Ruling on February 3, 2026, which formally established the issues to be resolved within Track 2 of the proceeding. Specifically, the Commission will determine whether the proposal to value Pre-2019 Banked RECs at a value other than zero dollars is consistent with applicable law and Commission precedent. If the Commission concludes that such a valuation approach is permissible, it will then consider whether to direct the IOUs to apply a non-zero valuation for Pre-2019 Banked RECs within the 2026 and future ERRRA Forecast proceedings, including how any such value should be determined and allocated consistent with indifference principles for all customers. The Scoping Ruling also set forth the Track 2 schedule, beginning with Opening Testimony served on March 2, 2026, followed by Reply Testimony on March 23, 2026. A potential Staff Proposal is expected no later than March 27, 2026, and a deadline for parties to present a settlement is May 15, 2026. The Proposed Decision (PD) is expected to be issued by July 31, 2026, with a final Commission Decision expected at the September 3, 2026 Voting Meeting.

Regarding the Track 1 Appeal, the CPUC, the IOUs, and CUE have all responded to CalCCA's Track 1 PCIA Appeal. CalCCA requested an extension for its reply to these comments from March 2, 2026 to April 1, 2026. The extension was granted one day after the request was filed.

The CPUC released a Ruling on February 20, 2026, requesting that parties file comments on the issues to address in Track 3 of the PCIA proceeding. Comments are due on March 27, 2026. Reply comments are due on April 10, 2026.

Resource Adequacy (RA) - R.25-10-003

Background: This rulemaking continues the CPUC's oversight of the Resource Adequacy (RA) program, establishes forward RA procurement obligations applicable to load-serving entities (LSEs) beginning with the 2027 compliance year, and considers structural reforms to the program. This proceeding is the successor to Rulemaking 23-10-011, which addressed these topics over the past two years.

This rulemaking will address the 2027 and 2028 RA compliance years, local RA obligations for the 2027-2029 and 2028-2030 compliance years, and further refinements to the Slice of Day (SOD) program.

Track 1 of the proceeding will consider:

1. Adoption of Local Capacity Requirements for 2027-29 compliance years
2. Adoption of Flexible Capacity Requirements for 2027
3. Accreditation for Long-Duration Energy Storage (LDES)
4. Unforced Capacity (UCAP)¹
5. Accreditation for Solar and Wind Resources
6. Transactability Issues within the Slice of Day Framework
7. Residual Unit Commitment (RUC) for RA Resources
8. Energy Only (EO) Resources²

A final decision on Track 1 is anticipated by early July 2026, and Track 2 is expected to conclude by June 2027.

Update: Parties to the RA Proceeding submitted Track 1 proposals for all relevant topics above on January 23, 2026, except Transactability Issues.

OCPA staff virtually attended large portions of the RA Proposal Workshops on February 10-11, 2026, which enabled parties to walk through the various Track 1 proposals they have recommended for modifying the RA program. CalCCA presented four proposals, recommending the CPUC:

¹ This is a new metric being developed that considers outage potential for different resources that could be used for Slice of Day (SOD) accreditation and potentially other aspects of the RA program and more broadly throughout CPUC operations.

² This pertains to CalCCA's prior proposal to count co-located EO resources as RA resources.

1. Coordinate with the CEC to separate data center loads from the forecast used to set RA requirements and instead base associated RA requirements on actual data center load interconnection information;
2. Account for the reliability value that can be provided by energy only co-located resources under the SOD framework;
3. Clarify the intended use of local RA central procurement entity (CPE) data request results³ to ensure consistency; and
4. Publish aggregated results of the local RA CPE data request process so that CPEs and LSEs have access to the same information to inform their procurement processes.

Comments on Track 1 proposals are due on March 6, 2026. Reply Comments are due on March 20, 2026.

The CPUC released its Report on Transactability within the Slice of Day Resource Adequacy Framework on February 23, 2026, a delay of over two weeks from the original timeline. The CPUC's report concluded that the complexities, potential risks, and additional administrative burden on the CPUC of implementing RA obligation transactability outweigh any potential benefits.

This was a highly disappointing result, and CalCCA will still plan to file its proposal for RA SOD Transactability and will plan to push back against the CPUC's report. Progress with RA SOD Transactability may prove more successful at the legislature with SB 1138, which would effectively order the CPUC to implement the mechanism.

The deadline for party proposals on RA SOD Transactability has been set for March 3, 2026. A workshop will be held on March 9, 2026 for discussion on party proposals.

Integrated Resource Planning (IRP) – R.25-06-019

Background: This OIR, issued on July 2, 2025, supersedes R.20-05-003 as the primary venue for CPUC oversight of the IRP process, which requires the Commission to identify a resource portfolio to ensure a reliable electric supply that can also achieve clean energy and environmental goals of SB 350 and SB 100.

R.20-05-003 remains open for purposes of considering a staff proposal on the Reliable and Clean Power Procurement Program (RCPPP) framework, as proposed in the April 25, 2025 Administrative Law Judge's Ruling. Future work or further development and implementation of RCP, if adopted, will occur in this new IRP rulemaking.

On January 15, the CPUC issued a PD in the IRP proceeding which illustrates currently intended procurement requirements. The decision would require OCPA to procure 23 MW of NQC by June 1, 2030 and an additional 46 MW by June 1, 2032, with at least 50% of each tranche coming from non-storage resources and contracts lasting at least 10 years. Eligible resources must be zero-emitting or RPS-eligible, accredited using marginal ELCC values, and failure to comply would

³ The CPUC collects data from all LSEs in SCE and PG&E territory on existing Local RA contracts and shares an anonymized version of the data to the CPE to inform existing contracts and how much Local RA is still needed.

trigger penalties based on the cost to procure additional supplemental resources. Semi-annual compliance filings are required through 2032. The CPUC will vote on a final decision as early as February 26, 2026.

The CPUC filed a ruling on January 16, 2026 that sets the IRP due date for OCPA as June 1, 2026, the same date as the required procurement compliance filings.

On February 9, 2026, CalCCA filed a joint request—supported by AReM, PG&E, SCE, SDG&E, Shell, and the UC Regents—to extend the IRP filing deadline for LSEs to six months after the issuance of the final Inputs and Assumptions documents, noting that the current June 1, 2026 deadline does not provide adequate time for incorporation of final modeling inputs.

CPUC staff shortly thereafter posted the Final 2024–2026 Inputs and Assumptions document and supporting materials on February 10, 2026, including additional detail on marginal ELCC study results and reliability inputs to inform LSE IRP development.

Update: On February 26, 2026, the CPUC voted unanimously (5-0) to approve a revised Procurement Order with significant changes to the original PD. OCPA’s original procurement obligations were 23 MW of net qualifying capacity (NQC) by 2030 and 46 MW of NQC by 2032, with a 50% cap on procurement coming from energy storage of any kind. OCPA’s procurement obligations are now to procure 25 MW of capacity in each of 2030, 2031, and 2032 for a total of 75 MW. The annual deadline for all three years is June 1. Out of the total 75 MW, OCPA must procure a total of at least 19 MW of clean, firm resources⁴ and/or Long-Duration Energy Storage (LDES).⁵ The 50% cap on procuring energy storage resources has been removed.

The PD was also updated with many other changes. Some of the more critical updates are listed below.

- The CPUC will maintain consideration of good faith efforts in this procurement order in the same manner as prior procurement orders, where an LSE can show its considerable efforts to reach compliance to potentially avoid or minimize penalties even if the LSE is ultimately found non-compliant.
 - LSEs can show evidence of non-competitive or unreasonable pricing received in solicitations in showings as part of these good faith effort considerations.
- RA bridge provisions from D.25-09-007 will also apply for this procurement order. These ensure that any LSE that fails to deliver the requisite new capacity by 2030, 2031, and 2032, and/or does not have signed contracts and is not resource-adequacy compliant, will be found non-compliant and subject to a financial penalty of the net CONE value.
- The two-tranche approach from the original PD was replaced with three tranches based on CAISO concerns with reliability in 2031.
- LSE total allocations were updated with finalized energy demand forecast tables for the 2024 IEPR on February 20, 2026.

⁴ These must be non-weather-dependent, non-use-limited, zero-emission, and maintain 80% annual capacity factor. Eligible technologies include geothermal, green hydrogen, or bioenergy, but not storage.

⁵ These must be energy storage resources that can discharge for at least eight hours continuously.

- A new ELCC study is underway to develop ELCC values for the 4,000 total MW ordered by 2030 and 2031. The CPUC will finalize the report and ELCC values no later than July 31, 2026.
- The CPUC will publish indicative ELCC values for the remaining 2,000 MW for 2032 by July 31, 2026, and will have final 2032 ELCC values by December 31, 2027.
- Baseline swaps continue to follow the provisions outlined in D.23-02-040, including prohibition on swapping resources with contracts termination after January 13, 2023, and eligibility for swapping of 2030, 2031, or 2032 obligations.
- Department of Water Resources Long Leadtime Procurement will continue as adopted in D.24-08-064, and if this procurement proves successful, LSEs may be notified of allocations that lessen their requirements going forward.
 - As of today, DWR procurement for long leadtime resources is zero.

Climate Credit – R.25-07-013

Background: This OIR was opened on July 24, 2025, to improve the California Climate Credit (Climate Credit). The Climate Credit has historically provided residential and small business customers with semi-annual bill credits using a portion of revenues from the California Cap-and-Trade Program. Residential customers received on average ~\$120 from the credit in 2025, dispersed in April and October. In 2026, the annual credit amount is anticipated to be closer to \$70. The CPUC opened the proceeding to further address affordability, and to support the California Industry Assistance which is intended to minimize businesses relocating to other states without emissions compliance programs.

CalCCA filed Opening Comments on the Climate Credit OIR on September 26, 2025 and reply comments on October 13, 2025, recommending the CPUC support the OIR preliminary scope, including the consideration of changes to customer eligibility criteria, timing and method of Climate Credit distribution, and messaging to customers. OCPA aims to support modifications to the Climate Credit that are competitively neutral, including eligibility criteria and customer messaging, and to ensure existing customers continue receiving the Climate Credit.

Update: The CPUC filed a Scoping Ruling for the Climate Credit proceeding on February 3, 2026, establishing the scope for Phase 1 of the rulemaking. Phase 1 will address only the residential Climate Credit through a bifurcated Phase 1A and Phase 1B process, excluding issues related to the Small Business Climate Credit and the Industry Assistance Credit.

The Climate Credit updates under consideration include implementation changes, modifications to program goals, revisions to eligibility, the timing and number of distributions, and other structural adjustments. The Scoping Ruling also set a schedule, bifurcating the issues into a Phase 1A and Phase 1B.

Phase 1A will evaluate whether the IOUs should pause distribution of the 2026 Climate Credits, whether immediate changes should be made to the residential gas and electric credits to enhance affordability, and how to implement statutory requirements regarding revenue transfers and outreach.

Phase 1B will consider broader potential reforms, including whether to revise overarching principles or goals for the Climate Credit, whether to change eligibility or distribution timing, how outreach practices should be updated, and whether the costs and implementation impact of any proposed changes are reasonable—including their effects on environmental and social justice communities.

On February 9, 2026, the CPUC distributed a PD that will pause the delivery of the residential climate credit until the Commission determines when in 2026 these credits should be distributed. Both the April and October credits were paused. Comments on the PD are due on March 2, 2026 and reply comments are due on March 9, 2026. This item may be heard, at the earliest, at the Commission's March 19, 2026, Business Meeting.

Opening comments on Phase 1A more generally are also due on March 2, 2026. Reply comments are also due on March 9, 2026. A Phase 1A PD will be released for party comment no later than March 27, 2026. Importantly, within this PD, the CPUC is considering moving the credit distribution to high-billed summer months to maximize its support for most customers from an affordability perspective.

Demand Response – R.25-09-004

Background: The OIR was issued on September 29, 2025. This OIR seeks to evaluate and enhance the consistency, predictability, reliability, and cost-effectiveness of demand response resources. The Commission will accomplish this enhancement by updating the demand response guiding principles, policies, and data system and process requirements.

In this rulemaking, CPUC intends to re-evaluate several key Commission demand response policies, including its dual participation policy (D.09-08-027), valuation methodologies and evaluation metrics, and others. The dual participation policy enables customers to participate in up to two DR programs, assuming one provides an energy payment, and one provides a capacity payment.

Update: The CPUC released a Scoping Memo and Ruling on February 12, 2026, which set the topics and schedule for the Demand Response Proceeding. The issues and questions that will be considered in the proceeding include:

- 1) Should the Commission authorize bridge year funding extensions for existing demand response programs, pilots, and budgets approved by Decision (D.) 23-12-005?
- 2) Should the Commission authorize an extension of the existing Flex Alert marketing campaign budget and contract?
- 3) What guiding principles should the Commission adopt for demand response policies?
- 4) What standardized data systems, communication protocols, and data transfer processes should the Commission adopt or amend to support demand response, including supply side demand response and dynamic rates, with consideration of cost/benefits tradeoffs?
- 5) What policies should the Commission adopt or amend to make demand response resources more consistent, predictable, reliable, and cost-effective, including but not limited to:
 - a) Dual participation;
 - b) Valuation methodologies and evaluation metrics;
 - c) CAISO market integration topics;

- d) Resource adequacy valuation;
- e) Cost-effectiveness evaluation; and
- f) Prohibited resource policy?

Addressing item 2 above, the CPUC filed a PD on February 13, 2026 to authorize the continuation of the Flex Alert paid media campaign for 2026. The 2026 calendar year budget for the Program shall be \$15 million, which is lower than originally proposed within the December 30, 2025 staff proposal that suggested maintaining the same annual budget of \$22M. The PD may be voted on, at the earliest, at the Commission's March 19, 2026, Business Meeting.

Energization R.24-01-018

Background: This rulemaking seeks to implement provisions of SB 410 and AB 50, which require the Commission to establish reasonable average and maximum target time periods for the energization of new load, and a procedure for customers to report energization delays to the Commission. It also covers other matters that relate to prompt energization of load, such as the implementation of flexible connections contracts.

On December 24, 2026, the CPUC released a PD that would establish a standard offer for flexible service connections (FSC).⁶ Via this PD, PG&E and SCE would be required to implement ongoing data collection and reporting to refine the standard offer and formalize a preliminary capacity assessment process that allows prospective customers to determine if they qualify for an FSC at a particular grid location.

Update: On February 3, 2026, the CPUC sent out a revised version of its PD that would establish a standard offer for flexible service connections for energization customers. This revised version factors in stakeholder feedback via comments and reply comments.

On February 10, 2026, the CPUC issued D.26-02-025, which officially established a standard offer for flexible service connections for energization customers.

California Energy Commission (CEC) Updates

Integrated Energy Policy Report

Background: The CEC adopts an Integrated Energy Policy Report (IEPR) every two years and an update every other year. A cornerstone of California's energy planning is the California Energy Demand Forecast, developed by the CEC. This forecast provides critical information that informs energy planning proceedings across the state and serves as an important input into the state's comprehensive energy planning. The CEC, CPUC, and California ISO agreed that specific elements of this forecast set will be used for planning and procurement in the California ISO's

⁶ Flexible service connections allow a customer who is waiting for an upgrade to energize additional load to use more power when the expected grid conditions indicate it will be safe to use power. At times of peak congestion when it would not be safe, the customer is prohibited from using this power. SCE just wrapped up a FSC pilot on January 3, 2026.

transmission planning and the CPUC's integrated resource plan, resource adequacy, distribution system planning, and other planning processes.

Throughout 2025, the CEC had grappled with balancing priorities of reliability and affordability within the 2025 IEPR. OCPA is most directly impacted by the results of the Planning scenario as this scenario has historically been used to inform RA and IRP requirements. A higher electricity forecast within the Planning Scenario will likely increase OCPA's RA and IRP obligations. Greater electricity demand within the Local Reliability Scenario has historically informed transmission and distribution infrastructure planning and investment.

OCPA staff contributed significantly to CalCCA's comments on the 2025 IEPR assumptions, which stated that slightly more conservative assumptions should be made for the Planning Scenario.

The Final 2025 IEPR results include:

- Both a planning and local reliability forecast were adopted;
- Known loads were excluded from the planning forecast, which reduces System and Flex RA;
- The local reliability forecast will either include or exclude the known loads data depending on the use case as a one-time exception agreed to by the CAISO;
- Local capacity studies will use the local reliability forecast without the known loads since local capacity studies inform Local RA obligations for LSEs. Transmission local studies will use the forecast with the known loads; and
- More conservative EV and electrification demand load modifiers will be used for the planning scenario and the local reliability scenario than was done for the 2024 IEPR.⁷

Somewhat unexpectedly, the CEC decided to use the 2024 IEPR Planning Forecast for Integrated Resource Planning and Transmission Bulk System Planning. This forecast includes less conservative transportation electrification and building electrification assumptions, and more aggressive baseline demand than the 2025 IEPR Planning scenario. It is still lower than the 2025 IEPR Local Reliability scenario for peak impact with or without known loads, though, effectively serving as a middle ground for the IRP and transmission planning purposes.

At the CEC Business Meeting on January 21, 2026, CEC commissioners adopted the final IEPR results.

Update: The CEC released an RFP for an entity to support improvements to its IEPR modeling efforts pertaining to incorporating climate data on February 23, 2026. In 2024, IEPR tested additional Weather Research and Forecasting (WRF) model runs that suggested a significantly warmer climate than would be assumed using the historical approach. The 2024 and 2025 IEPR

⁷ Some transportation electrification and building electrification load is factored into the base forecast and additional projections are factored in through the "Additional Achievable Transportation Electrification" (AATE) and "Additional Achievable Fuel Switching" (AAFS) load modifiers. Additional achievable scenarios range from AATE/AAFS 1 through AATE/AAFS 5, with the former being most conservative and the latter being most aggressive. This year AATE/AAFS 2 & 3 were selected for the planning and local reliability scenarios, while AATE/AAFS 3 & 4 respectively were selected for the 2024 IEPR.

forecasts did not include these additional assumptions, and if they had, the electricity demand forecasts would have been higher. This RFP will seek to bring on expert support that will inform whether and how to improve climate data assumptions within future IEPR forecasts.

California Independent System Operator (CAISO) Updates

Interconnection Process Enhancements (IPE) 5.0

Background: [The 2023 Interconnection Process Enhancements \(IPE\) initiative](#) focused on enhancing coordination of resource procurement and interconnection, resource planning and transmission planning to achieve state reliability and policy needs. In the 2023 IPE initiative, the CAISO considered fundamental changes to the Generator Interconnection and Deliverability Allocation Procedures.

With IPE 2023, intake scoring and ranking processes are leveraged to determine which projects are included in cluster studies for determining Transmission Plan Deliverability (TPD) allocation. The scoring and ranking processes led to an overall 73% reduction in the number of submissions for cluster 15 projects, since only projects up to 150% of deliverability at an area of the transmission system are studied. IPE 2023 was approved by FERC.

[IPE 5.0](#) intends to address commitments the ISO made during IPE 2023. IPE 5.0 seeks to further enhance the interconnection process, but not nearly as substantially as IPE 2023. The CAISO released the IPE 5.0 Final Proposal on December 22, 2025.

The following are key takeaways on what IPE 5.0 is slated to do in its final form assuming it is approved by FERC.

- As an alternative pathway to the typical commercial interest capacity allocation process for LSE's that have not been awarded enough capacity to allocate to a project through the regular process, once per interconnection app cycle, this LSE may award full capacity to a single project to increase its commercial interest score (see intake scoring criteria above) and help it likely move to the cluster scoring.
- This new proposal caps the projects that receive commercial interest points through this alternative pathway to the lesser 500 MW or 50% of the LSE's forecasted resource adequacy load share
- CAISO proposes distribution level interconnection requests now also must go through this same process if they are seeking to participate in the ISO markets with deliverability
- From when this is passed by FERC, if a project seeks COD extensions beyond 7-years in queue, it must meet commercial viability criteria (CVC), including having an executed PPA.

Update: The CAISO held a virtual working group session on February 9, 2026 to gather stakeholder feedback on the revised and final IPE 5.0 proposal, which was modified one final time due to an overwhelming number of requests for energy-only (EO) project pathways. A revised final proposal will be posted on February 24, 2026 with further details on the modifications, but this is a win towards enabling EO projects to more easily gain full TPD status down the line.

California Air Resources Board Updates

Cap and Invest Program

Background: On January 20, 2026 California Air Resources Board (CARB) released proposed amendments to the Cap & Invest rules. CARB Staff are proposing amendments to the Cap-and-Trade Regulation (Proposed Amendments), aligned with Legislative direction in AB 1207, SB 32 (Pavley, Chapter 249, Statutes of 2016) GHG emissions reduction target of at least 40% below 1990 levels in 2030, the carbon neutrality and 85% below 1990 targets in AB 1279 and the requirements of AB 398 (Garcia, Chapter 135, Statutes of 2017) which are aimed at ensuring the Program:

- Supports the State’s climate targets including enabling a smooth transition to the post-2030 Program;
- Considers consumer affordability, cost-effective GHG emissions reduction and technological feasibility;
- Minimizes the risks of emissions leakage;
- Maintains cost-containment mechanisms to protect against price volatility; and
- Avoids disproportionate impacts on low-income communities.
- The Proposed Amendments aim to achieve the following objectives:
- Updating allowance budgets to reflect recent adjustments to the GHG Emission Inventory and alignment of post-2030 budgets in support of achieving the State’s 2045 climate targets.
- Updates to market rules, in the context of budget adjustments, to support liquidity, enhance market protections, and contain costs.
- Amendments to ensure the Program appropriately supports consumer affordability, covers emissions, minimizes GHG emissions leakage, and incentivizes decarbonization in the evolving electricity, industrial, and transportation sectors.
- Revised methodology to account for the use of offset credits in annual budgets.
- Technical updates to offset credit provisions to clarify, streamline implementation, and reflect lessons learned.
- Administrative updates to clarify and streamline Program implementation.

The Proposed Amendments, if adopted, would result in significant GHG emissions reduction as well as air quality, health, and economic benefits across the State. There will be a public hearing on March 9, 2026. A full summary can be found [here](#), while the proposed amendments can be found [here](#).

Update: Peninsula Clean Energy (PCE) is planning on submitting comments regarding CARB’s proposed decision not to replenish the Voluntary Renewable Energy (VRE) Reserve.⁸ PCE is advocating for the maintenance of this mechanism that enables LSEs and other entities to contribute towards emission reductions above and beyond their mandates.

South Coast Air Quality Management District Updates

⁸ The VRE enabled entities to procure voluntary renewable electricity or RECs beyond mandated amounts and retire carbon allowances through the Cap and Invest Program, effectively reducing the total available emissions allowances available and ensuring actual statewide emission reductions.

SCAQMD Rules 1146 & 1146.1

Background: The South Coast AQMD is the air pollution control agency for all of Orange County and the urban portions of Los Angeles, Riverside and San Bernardino counties. In California, local air districts have the authority to grant permits to stationary sources, while CARB reviews and helps coordinate programs for California air districts. As such, South Coast AQMD is responsible for controlling emissions primarily from stationary sources of air pollution, which contribute about 25% of the area's ozone-forming pollution. These can include anything from large power plants and refineries to the corner gas station.

SCAQMD used to implement the Regional Clean Air Incentives Market (RECLAIM) program, which was a market-based emissions trading program using RECLAIM trading credits (RTCs) for NO_x and SO_x emissions allowances. The US EPA criticized RECLAIM as falling short of expectations, pointing to RTC price spikes reducing the program's coverage and a subsequent glut of RTCs from plant closures that critics claim lowered the incentive for pollution reductions at remaining RECLAIM facilities. As such, SCAQMD decided to sunset the program in 2017. Command and Control Rules will take its place, which sets specific emission limits for each plant. SCAQMD completed broad rule amendments that enabled RECLAIM's sunset. They reviewed Best Available Retrofit Control Technology (BARCT), state-wide technology-based limits required by AB 617, to help develop command and control standards. Once the EPA approves the landing rules, the transition date from RECLAIM will be set and NO_x and SO_x RTCs will no longer be available.

Open Market Emission Reduction Credits (ERCs) can be purchased as offsets for emissions increases to receive a permit. ERCs are generated through reducing emissions above and beyond the minimum requirement or by fully shutting down a plant. It is expected that all facilities will find it challenging to generate NO_x ERCs, and there may be insufficient NO_x ERCs on the open market. Staff are brainstorming solutions to address this challenge. As of October 2023, New Source Review Rules were being developed that govern new construction or modification of plants in coordination with CARB and US EPA.

SCAQMD 1146 & 1146.1 are the Landing Rules for Boilers, Process Heaters, and Steam Generators. They most importantly set NO_x emission standards for Industrial, Institutional, and Commercial Boilers, Steam Generators, and Process Heaters. As of 2018, NO_x limits range from 40 ppm at most lax as a general minimum for liquid units to 5-12 ppm as most stringent for gaseous units as of 2018.⁹

Update: SCAQMD held Rule 1146 & 1146.1 Working Group #3 on February 13, 2026. This meeting covered the cost-effectiveness of several potential decarbonization technologies for industrial energy usage.

Next, SCAQMD will hold another Working Group session to present initial rule concepts in March or April of 2026. SCAQMD expects to share preliminary draft rule language and a draft staff report in Q3 2026, and anticipates a public hearing on the matter to occur in Q4 2026.

⁹ For smaller or older plants (pre-September 2008), there are other alternative compliance pathways relating to operational practices on oxygen levels and tune-ups twice per year.

Other Updates

Governor Newsom named a new California Public Utilities Commission President to launch a new phase in an effort to protect consumers from escalating utility costs. John Reynolds will be the new president of the CPUC. Former CPUC President Alice Reynolds will transition to the CAISO Board of Governors. Christine Harada has been added as the newest commissioner to the CPUC. The press release can be found [here](#).

Events, Workshops, and Meetings

During the past month, staff attended several events, workshops, and meetings. These included:

- OCPA Regulatory and Legislative Committee Meeting
- CalCCA Regulatory Policy meetings – including several tiger team meetings covering PCIA, POLR, IRP, Large Load, Distribution, DAC-GT, IEPR and RA proceedings
- Weekly CalCCA Legislative Policy meetings - including several Tiger teams such as Infrastructure, Building Decarbonization, Zero-Emission Vehicles, Autonomy, and Affordability
- CalCCA Federal Policy meetings
- CalCCA Legislative Committee Meeting
- CalCCA Monthly CAISO meeting
- Stakeholder Policy meetings
- CalCCA Regulatory Directors meeting
- CalCCA Compliance meetings
- SCE ERRA Meetings
- CPUC Resource Adequacy Track 1 Proposals Workshop Day 1 & 2
- CPUC Voting Meeting
- SoCalREN Advisory Committee Meeting
- UCLA Anderson Energy Innovation Conference
- Joint IOU Transportation Electrification Technical Assistance Workshop
- Joint Hearing: Utilities and Energy & Privacy and Consumer Protection
- CAISO Large Loads Information Session
- AEU Hearing: Assessing Progress in Developing Clean Energy
- 2025 SB 100 Joint Agency Report Draft Results Workshop
- Diablo Canyon Power Plant Tour

FISCAL IMPACT

None

ATTACHMENTS

1. 2026 OCPA Bill Tracker
2. AB 1761 Fact Sheet
3. AB 1761 Letter of Support

4. SB 1138 Fact Sheet
5. SB 1138 Letter of Support

Orange County Power Authority
2026 California Bill Tracker (Updated 2/26/2026)
High Priority

Bill #	Author	Title	Category	Summary	Status	Position
AB 710	Irwin	Electricity: dynamic pricing: advanced metering infrastructure	Dynamic Rates	This bill would require the commission, on or before January 1, 2028, to require each electrical corporation to offer optional dynamic pricing tariffs, as specified. This bill would require the commission to require each electrical corporation, and the governing board of each local publicly owned electric utility, on or before January 1, 2028, to analyze the feasibility of deploying advanced metering infrastructure to all customers. Based on that analysis, the bill would require each electrical corporation and the governing board of each local publicly owned electric utility, on or before January 1, 2029, to develop a plan for complete advanced metering infrastructure deployment, where feasible.	1/27/2026 - In Senate. Read first time. To Com. on RLS. for assignment.	
AB 1761	Rogers	Electricity: calculation methodology: data disclosure	Data Disclosure	This bill would require the commission to ensure that all data relied on in any decision or ruling, or in any proposal or analysis provided by an electrical corporation, the commission's staff, or any other party, for the determination or application of a calculation methodology for any charge imposed on customers of a load-serving entity to recover the cost of contracts or resources owned by an electrical corporation or any value derived from that calculation is made available to load-serving entities and ratepayer advocates on behalf of customers. The bill would require that data to meet specified requirements, including that it is made through a public disclosure, except for market-sensitive data, as provided.	2/23/2026 - Referred to Com. on U. & E.	CalCCA Sponsored Legislation

Orange County Power Authority
2026 California Bill Tracker (Updated 2/26/2026)
High Priority

AB 1787	Schultz	Electricity: rates: optional dynamic rate tariff.	Dynamic Rates	This bill would require a large electrical corporation, if the commission approves the large electrical corporation's request to upgrade its smart meter infrastructure and related information management and billing systems on or after January 1, 2027, to offer to each of its customers from whom the incremental costs of those upgrades are recovered at least one optional dynamic rate tariff upon the upgraded smart meter infrastructure being placed into service and its costs being recoverable in rates, as specified. The bill would prohibit the commission from approving a request of a large electrical corporation to recover costs associated with a smart meter infrastructure upgrade and related information management and billing systems costs unless specified conditions are met. The bill would require the commission, if it orders a large electrical corporation to implement an optional dynamic rate tariff, to ensure, among other things, the large electrical corporation makes the same time-varying transmission and distribution rates available to both bundled customers and unbundled customers located in the same geographic area.	2/23/2026 - Referred to Com. on U. & E.	
SB 1138	Padilla	Load-serving entities: resource adequacy requirements.	Resource Adequacy	This bill would require the commission to permit a load-serving entity to demonstrate compliance with resource adequacy requirements by selling to, or otherwise making transactions with, another load-serving entity to meet not more than 25% of its compliance obligation, on a short-term basis, and to permit those transactions to be denominated in the same unit of time used to denominate resource adequacy compliance requirements.	2/19/2026 - From printer. May be heard in committee March 21.	CalCCA Sponsored Legislation

Medium Priority

Bill #	Author	Title	Category	Summary	Status
AB 13	Ransom	Public Utilities Commission: membership: reports.	CPUC Reporting	The bill would require the Governor, in selecting, and the Senate, in confirming, members of the commission to consider regional diversity in the membership of the commission. The bill would require the Governor, in appointing a candidate for membership in the commission, to consider using a candidate pool that comprises persons with permanent residences in certain regions of the state, as specified.	In committee: Held under submission.
AB 34	Patterson	CA RPS Program: local POU: large hydro generation	RPS	This bill would provide that the provision related to the procurement of eligible renewable energy resources by local publicly owned electric utilities also applies to the compliance periods established by the Energy Commission.	In Senate. Read first time. To Com. on RLS. for assignment.
AB 61	Pacheco	Electricity and natural gas: legislation imposing mandated program and requirements: third-party review.	Programs	This bill would request the office to establish, by January 1, 2027, a program to, upon request of the Legislature, analyze legislation that would establish a mandated requirement or program or otherwise affect electrical or gas ratepayers, as specified. The bill would request the office to develop and implement conflict-of-interest provisions that would prohibit a person from participating in an analysis for which the person knows or has reasons to know that the person has a financial interest. The bill would establish the Energy Programs Benefit Fund in the State Treasury and continuously appropriate the moneys in the fund to the office to support the work of the office in providing analyses under the bill. The bill would repeal these provisions on January 1, 2031.	In committee: Held under submission.
AB 72	Jackson	EV Economic Opportunity Zone: County of Riverside	EV	This bill would, upon appropriation by the Legislature, establish an Electric Vehicle Economic Opportunity Zone (EVEOZ) for the County of Riverside, administered by the Labor and Workforce Development Agency, for the purpose of creating programs to make electric vehicle manufacturing jobs and education more accessible to lower income communities. The bill would require the agency to collaborate with the County of Riverside in determining the geographical boundaries of the EVEOZ. By imposing additional duties on local officials, the bill would impose a state-mandated local program. The bill would authorize the agency to partner with educational institutions, electric vehicle manufacturing businesses, and local and national financial intuitions to develop EVEOZ education, training, and investment programs, as specified.	In Senate. Read first time. To Com. on RLS. for assignment.

Medium Priority

AB 222	Bauer-Kahan	Data centers: power usage effectiveness: cost shifts.	Data Centers	This bill would require the Energy Commission to establish a process for the owner of a data center, as defined, to submit the power usage effectiveness ratio, as defined, for the data center to the Energy Commission on a biannual basis, and require the owner of a data center to submit this information for the data center in the manner and timeframe specified by the Energy Commission. The bill would require the Energy Commission, as part of the 2027 edition of the integrated energy policy report, to include an assessment of electrical load trends for data centers, as provided.	In committee: Held under submission.
AB 306	Schultz and Rivas	Building regulations: state building standards	Building Standards	This bill would, from June 1, 2025, until June 1, 2031, inclusive, prohibit a city or county from making changes to the above-described building standards unless a certain condition is met, including that the commission deems those changes or modifications necessary as emergency standards to protect health and safety.	From committee chair, with author's amendments: Amend, and re-refer to committee. Read second time, amended, and re-referred to Com. on HOUSING.
AB 441	Hadwick	Wildfire prevention: Office of Wildfire Technology Research and Development: wildfire mitigation program	Wildfires	Would repeal provisions related to the Office of Wildfire Technology Research and Development.	In committee: Set, first hearing. Hearing canceled at the request of author.
AB 443	Bennett	Energy Commission: integrated resource policy report: curtailed solar and wind generation: hydrogen production	Hydrogen	This bill would require the Energy Commission, as part of the 2027 edition of the integrated energy policy report and each edition thereafter, and contingent upon an appropriation for this purpose, to include an assessment of funding needs for port infrastructure for offshore wind energy development, as specified. The bill would require the Energy Commission, in consultation with specified entities, to include in the assessment any federal, state, and local funding opportunities, including general obligation bonds and funding from the private sector, that can help build port infrastructure for offshore wind energy development.	In committee: Referred to APPR. suspense file.

Medium Priority

AB 550	Petrie-Norris	CESA: take of species: renewable electrical generation facilities	Generation Facilities	This bill would provide that if an at-risk species, as defined, becomes listed as an endangered, threatened, or candidate species, further authorization or approval shall not be required for a take of that species, if specified conditions are met, including that the potential listing of the at-risk species was anticipated in a permit previously issued by the department for incidental take caused by a renewable electrical generation facility. The bill would authorize the department, in partnership with a permit applicant for an incidental take caused by a renewable electrical generation facility, to develop a research project that evaluates specified factors. The bill would authorize a research project reviewed and approved by the department to contribute to a renewable electrical generation project's mitigation, as provided. The bill would require the department to report to the Legislature specified information, including among other things, a report on each at-risk species authorized for take, as provided.	In committee: Hearing postponed by committee.
AB 705	Boerner	Public Utilities Commission: Independent Office of Audits and Investigations	CPUC	This bill would delete the provision providing for the appointment of the chief internal auditor and instead provide that, effective January 1, 2026, the internal audit unit of the commission and its staff are transferred to the Independent Office of Audits and Investigations, which the bill would establish within the commission, as specified. The bill would provide for the appointment and removal of the director of the office, who would have the title of Inspector General. The bill would require that the office have access and authority to examine all records, files, documents, accounts, reports, correspondence, or other property of the commission, public utilities, and other entities regulated by the commission, as specified. The bill would require the Inspector General to report to the Governor and the Legislature, as provided.	From committee: Do pass and re-refer to Com. on APPR. (Ayes 15. Noes 1.) (July 15). Re-referred to Com. on APPR.
AB 716	Carrillo	Fire safety standards: hydrogen facilities	Hydrogen	This bill would require the State Fire Marshal to to appoint a hydrogen fire expert to answer questions and provide clarification on the implementation of hydrogen production, storage, and distribution facilities, ensuring that hydrogen facilities comply with the most up-to-date fire safety standards. The bill would require the State Fire Marshal to provide ongoing training to local fire departments and building inspectors to ensure that hydrogen-related safety protocols are understood and enforced statewide.	Read second time and amended. Re-referred to Com. on APPR.

Medium Priority

AB 729	Zbur	Public utilities: climate credits	Climate Credits	This bill would require that the electric California Climate Credit be provided to the residential and small business retail customers of electrical corporations on the bills of those customers for the months of August and September of each year, and to the emissions-intensive trade-exposed retail customers of electrical corporations on the bills of those customers for the month of August of each year, unless otherwise directed by the commission, as specified. The bill would require that the natural gas California Climate Credit be provided to residential customers on the bills of those customers for the month of February of each year unless otherwise directed by the commission, as specified.	From committee chair, with author's amendments: Amend, and re-refer to committee. Read second time, amended, and re-referred to Com. on E., U & C.
AB 745	Irwin	Electricity: climate credits	Climate Credits	This bill would require the credit provided to residential customers of an electrical corporation to be provided on the bills of those customers for the months of July, August, and September of each year, or as otherwise directed by the commission to address extreme, unforeseen, and temporary circumstances. The bill would require the credit to be volumetric, rather than independent of consumption.	Ordered to inactive file at the request of Senator Allen.
AB 864	Ward	Hazardous waste: solar photovoltaic modules	Solar Panel Recycling	This bill would exempt solar photovoltaic modules not identified as hazardous waste and treated, except as provided, as universal waste, as defined, from state hazardous waste regulations, if transferred to a designated recycler for legitimate recycling, as described, and if the facility meets specified criteria relating to registration permits, as provided. The bill would make the universal waste designation applicable to a solar photovoltaic module that is intended for recycling and cannot otherwise be resold, reused, or refurbished only until the department adopts regulations implementing alternative management standards for solar photovoltaic modules. The bill would also designate a solar photovoltaic module that can be resold, reused, or refurbished as surplus material. The bill would make a conforming change.	Ordered to inactive file at the request of Senator McNerney.
AB 942	Calderon	Electricity: climate credits	Climate Credits	This bill would exclude residential customers from receiving the California Climate Credit if they are not enrolled in the CARE or FERA program and their total electricity bills for the previous year were less than \$300.	From committee: Do pass and re-refer to Com. on RLS. (Ayes 5. Noes 2.) (August 29). Re-referred to Com. on RLS.

Medium Priority

AB 1016	Gonzalez	Power facility and site certifications: thermal powerplants: geothermal resources	Geothermal	This bill would additionally authorize the commission to exempt from the certification requirement, only until January 1, 2030, a thermal powerplant that generates electricity using geothermal resources and meets specified criteria, including that a person proposing an eligible thermal powerplant files an application on or before June 30, 2029, for certification with the local governmental agency that has land use and related jurisdiction over the area in which the powerplant is located to certify the site and related facility, and that the powerplant has a generating capacity of up to 150 megawatts, or that modifications are being made to a thermal powerplant that generates electricity using geothermal resources that do not add capacity in excess of 150 megawatts and for any plan for multiple geothermal powerplants that use at least one common infrastructure component and those powerplants, in total, have a net generating capacity of 50 or more megawatts.. Upon the commission granting an exemption, the bill would require the local governmental agency to be the lead agency to certify the site and related facility, as provided. The bill would make the local governmental agency that has land use and related jurisdiction over the area of the proposed site and related facility the lead agency pursuant to CEQA for any project that the commission exempts from the certification requirement and that generates electricity using geothermal resources as provided.	In committee: Set, first hearing. Hearing canceled at the request of author.
AB 1020	Schiavo	Public utilities: energy: taxpayer funding: reporting.	IOU	This bill would require each utility, defined as an investor-owned electrical corporation or gas corporation, to report certain information for any taxpayer funding, as defined, greater than or equal to \$1,000,000, that the utility has applied for or received. The bill would require the commission, for each application in which a utility is seeking ratepayer funding, to require the utility to report all relevant taxpayer funding the utility is pursuing or has secured, and, if the commission determines that a utility is not in compliance with that requirement, the bill would authorize the commission to impose a penalty against the utility, as specified. The bill would require the commission to require each utility to promptly deliver the financial benefits of taxpayer funding to ratepayers, as provided.	In committee: Held under submission.
AB 1117	Schultz	Electricity rates: optional dynamic rate tariffs	Rates	This bill would require the commission, through a new or existing proceeding, to develop optional dynamic rate tariffs applicable to each large electrical corporation for the large electrical corporation's commercial and industrial customers on or before July 1, 2028, and for its other customers, including residential customers, on or before July 1, 2030. The bill would require each optional dynamic rate tariff to include, at minimum, specified components, including dynamic transmission and distribution rates that reflect real-time grid conditions and certain nonbypassable charges, as specified.	In committee: Held under submission.

Medium Priority

AB 1156	Wicks	Solar-use easements: suspension of Williamson Act contracts: terms of easement: termination.	Solar	This bill would revise these provisions to authorize the Department of Conservation to determine that a parcel is eligible for suspension, as described above, upon the request of the landowner, instead of a request from a county or city, and would require the department to additionally make that determination in consultation with any applicable groundwater sustainability agency or services. The bill would revise the eligibility criteria for a parcel to be deemed eligible under these provisions by (1) additionally authorizing land for which there are or will be insufficient surface water or groundwater rights associated with the land to support commercially viable irrigated agricultural use; (2) deleting the requirement that the land not be located on lands designated as prime farmland, unique farmland, or farmland of statewide importance; and (3) additionally requiring that the land meet certain additional requirements relating to the land's historical use as cropland and whether it is encumbered by a conservation easement or enrolled in a land conservation program, as specified. The bill would also require the Department of Conservation to issue its determination of eligibility within 120 days following submission of a completed application package, and would deem any application not rejected within this 120-day period to be approved.	Ordered to inactive file at the request of Assembly Member Wicks.
AB 1301	Petrie-Norris	Electricity: Power Exchange	Power Exchange	This bill would abolish the Power Exchange and would make various conforming changes.	Referred to Com. on E., U & C.
AB 1334	Wallis	Solar energy: official state energy	Solar	This bill would establish solar energy as the official state energy.	In committee: Hearing postponed by committee.
AB 1436	Avila Farias	Public Utilities Commission: outreach.	PUC Outreach	Existing law, in effect until January 1, 2020, required the Policy and Planning Division of the Public Utilities Commission to undertake one or more studies of outreach efforts undertaken by other state and federal utility regulatory bodies and make recommendations to the commission to promote effective outreach, including metrics for use in evaluating success. This bill would repeal that obsolete provision.	Referred to Com. on E., U & C.
AB 1554	Calderon	Wildfire Fund	Wildfire Fund	Spot Bill	From printer. May be acted upon on or after February 8.
AB 1677	Boerner	Public utilities: affordability.	Affordability	This bill would state the intent of the Legislature to enact future legislation to require electrical corporations and gas corporations to reduce ratepayer bills by 25%.	From Printer. May be heard in committee March 5.
AB 1678	Harabedian	Public utilities	Spot	Spot Bill	From Printer. May be heard in committee March 5.

Medium Priority

AB 1692	Pacheco	Energy	Spot	Spot Bill	From Printer. May be heard in committee March 6.
AB 1715	Schiavo	Public utilities: reporting	Reporting	This bill would require the commission to issue universal guidelines for a searchable database of public utility advice letters, as provided, and require each public utility to maintain on its internet website a database meeting those guidelines. The bill would require the commission to require public utilities to provide, in any customer notice of a rate change, a link to the advice letter associated with the rate change.	Referred to Com. on U. & E.
AB 1757	Gallagher	Energy: nuclear facilities	Spot	Spot Bill	From printer. May be heard in committee March 12.
AB 1774	Boerner	Electrical corporations and gas corporations: rates	Spot	Spot Bill	From printer. May be heard in committee March 12.
AB 1813	Ward	Public Utilities Commission	Spot Bill	Spot Bill	From Printer. May be heard in committee March 13.
AB 1820	Schiavo	Solar energy systems: permit fees	Spot Bill	Spot Bill	From Printer. May be heard in committee March 13.
AB 1821	Pacheco	California Public Records Act	Spot Bill	Spot Bill	From Printer. May be heard in committee March 14.

Medium Priority

AB 2031	Petrie-Norris	Public utilities: property, franchises, and permits: exemption.	CPUC	This bill would reduce the time the commission has to approve or deny the advice letter from 120 days to 90 days.	From printer. May be heard in committee March 20.
AB 2057	DeMaio	Building standards: natural gas.	Natural gas	This bill would prohibit a city or county from making a change or modification to the above-described building standards that prohibits the use of natural gas in a residential unit. The bill would also require the commission to reject a modification or change to any building standard affecting a residential unit and filed by the governing body of a city or county that prohibits the use of natural gas in that residential unit.	From printer. May be heard in committee March 21.
AB 2111	Papan	Electricity: transmission planning and transmission facilities	CPUC - Transmission Planning	This bill would require the PUC, before approving the procurement of certain resources, to complete a transmission and interconnection availability assessment and to confirm there is sufficient infrastructure in the last approved transmission plan from the ISO to support the cost-effective procurement of approved resources by load-serving entities, as specified.	From printer. May be heard in committee March 21.
AB 2124	Pacheco	Electricity and natural gas: legislation imposing mandated programs and requirements: third-party review.	Programs	This bill would require the CCST to establish, on or before January 1, 2027, a program to, upon request of the Legislature, analyze legislation that would establish a mandated requirement or program, as defined, or otherwise affect electrical corporation or gas corporation ratepayers, as specified. The bill would require the CCST to develop and implement conflict-of-interest provisions to prohibit a person from participating in an analysis for which the person knows or has reasons to know that the person has a material financial interest. The bill would repeal these provisions on January 1, 2032.	From printer. May be heard in committee March 21.
AB 2175	Garcia	Electricity: electrical transmission and distribution systems.	Infrastructure	This bill would repeal from those policy objectives the deployment and integration of cost-effective advanced electricity storage and peak-shaving technologies.	From printer. May be heard in committee March 22.
AB 2181	Petrie-Norris	Public Utilities Commission.	CPUC	This bill would require the Governor, in appointing members of the commission, to ensure a diverse composition of commissioners by considering geographic diversity and other factors.	From printer. May be heard in committee March 22.

Medium Priority

AB 2182	Irwin	Electrical corporations: Industrial Decarbonization and Energy Efficiency Program.	EE Programs	This bill would require, on or before August 1, 2027, each large electrical corporation, as defined, to file a Tier 2 advice letter with the commission establishing an Industrial Decarbonization and Energy Efficiency Program with funding allocated from energy efficiency charges collected from eligible facilities, defined as industrial or manufacturing facilities that meet specified requirements, as specified. The bill would require the program to award grants to eligible facilities for eligible projects, including, among others, energy efficiency projects that meet certain requirements. The bill would require each large electrical corporation to administer the program, as provided, and require the Governor’s Office of Business and Economic Development to provide independent review and approval of grants awarded pursuant these provisions.	From printer. May be heard in committee March 22.
AB 2234	Papan	California Environmental Quality Act: geothermal exploratory projects.	Geothermal	This bill would expressly include as part of a geothermal exploratory project, among other things, equipment and activities necessary to establish interconnectivity between wells and reservoirs. The bill would exclude certain wells connecting to geothermal reservoirs from the 1/2-mile limit described above.	From printer. May be heard in committee March 22.

Medium Priority

AB 2239	Carrillo	Infrastructure-constrained energization areas: energization timelines: environmental review.	Infrastructure	This bill would require the PUC to designate an infrastructure-constrained energization area based on objective criteria, including limited distribution or transmission infrastructure relative to available electrical capacity or projected load growth, inland or desert geography, and extended energization timelines. The bill would require the PUC to adopt rules authorizing over-the-fence transactions within infrastructure-constrained energization areas when an electrical corporation cannot reasonably meet energization targets and other specific conditions are met, as specified. The bill would require the PUC, in coordination with the State Energy Resources Conservation and Development Commission (Energy Commission) and local jurisdictions, to establish procedures to facilitate expedited development of electrical generation and energy storage facilities in infrastructure-constrained energization areas, as specified. The bill would require the PUC, in coordination with the Energy Commission, the Office of Land Use and Climate Innovation, and local jurisdictions, to establish procedures to facilitate expedited permitting, siting, and construction of electrical infrastructure owned or operated by an electrical corporation within infrastructure-constrained energization areas, as specified. The bill would require the PUC and the Energy Commission to coordinate with, and advocate before, the Independent System Operator (ISO) for expedited review and prioritization of projects in infrastructure-constrained energization areas, as specified.	From printer. May be heard in committee March 22.
AB 2266	Schultz	Electricity: load-serving entities.	Resource Adequacy	This bill would require the commission, on and after January 1, 2030, when setting certain resource adequacy and resource procurement obligations for load-serving entities, to use the same capacity valuation method to assess the reliability contribution of each resource type, as specified. The bill would require the commission, on or before January 1, 2030, to initiate a process to consolidate certain compliance reporting for load-serving entities, as specified.	From printer. May be heard in committee March 22.
AB 2338	Ransom	Local publicly owned electric utilities: minimum planning reserves and reliability criteria.	Spot Bill	Spot Bill	From printer. May be heard in committee March 22.

Medium Priority

AB 2340	Arambula	Energy resources.	Spot Bill	Spot Bill	From printer. May be heard in committee March 22.
AB 2369	Rogers	Public utilities.	Spot Bill	Spot Bill	From printer. May be heard in committee March 22.
AB 2383	Zbur	Electricity: large energy use facilities.	Large Loads	This bill would require the commission, on or before January 1, 2028, in a new or existing proceeding, to provide for a classification of retail electricity consumers that are large energy use facilities, as defined, that is separate and distinct from classifications of service for other commercial or industrial retail electricity consumers and has its own rate schedule. The bill would require any rate schedule adopted by the commission for large energy use facilities to meet specified requirements, and would require the commission, in deciding whether to approve an electrical corporation's proposed rate schedule, to ensure the rates meet certain requirements, as provided. The bill would specify that, until January 1, 2028, an electrical corporation and a large energy use facility are not required to use the above-described classification of service if the commission has not approved the electrical corporation's rate schedule for that classification of service.	From printer. May be heard in committee March 23.
AB 2408	DeMaio	Energy: billing.	Rates	This bill would require the commission, if the average price of electricity or natural gas in the state exceeds 10% of the national average price in the preceding quarter, to suspend the collection of all fees charged to ratepayers on electricity or natural gas bills for a period of 6 months. The bill would also require the State Air Resources Board, if the average price of electricity or natural gas in the state exceeds 10% of the national average price in the preceding quarter, to suspend the requirements of the market-based compliance mechanism known as the California Cap-and-Invest Program for a covered entity that is an electrical corporation or gas corporation, and the collection of any moneys under the California Cap-and-Invest Program from those entities, for a period of 6 months.	From printer. May be heard in committee March 23.

Medium Priority

AB 2459	Wallis	Electricity: climate credits.	Spot Bill	Spot Bill	From printer. May be heard in committee March 23.
AB 2463	Petrie-Norris	Public Utilities Commission: rates: baseline capital-market risk framework: returns on equity.	Rates	This bill would require the commission, on or before April 1, 2027, to open a rulemaking to conduct a systemwide review of the methodologies used to determine the cost of capital and authorized return on equity for each electrical corporation and gas corporation. The bill would require the commission to establish and apply a baseline capital-market risk framework to serve as the analytical foundation for determining authorized returns on equity for electrical corporations and gas corporations, as provided. The bill would require the commission to develop and adopt a strategy for adjusting authorized returns on equity for each electrical corporation and gas corporation based on specified load growth or sales volume thresholds. The bill would require the commission to conduct a comprehensive review of the cost of capital adjustment mechanism applicable to each electrical corporation and gas corporation, evaluate the authorized return on equity applicable to each electrical corporation's infrastructure that serves transmission-level customers, and to evaluate alternative incentive-based return models that link a portion of shareholder earnings to performance outcomes, as provided.	From printer. May be heard in committee March 23.
AB 2464	Wicks	Energy: clean, firm resources.	Clean, firm resources	This bill would require the PUC, working with the Energy Commission, on or before June 30, 2027, to prepare and submit to the Legislature a statewide assessment of the role and necessity of clean, firm resources in meeting the state's clean energy and reliability objectives, potential technologies and strategies for integrating clean, firm resources into the state's energy mix, recommendations on procurement, policy, and planning actions to support clean, firm resources, and consideration of current and projected renewable and clean, firm generation capacity, reliability requirements under varying system conditions, and the cost and emission implications of clean, firm resources.	From printer. May be heard in committee March 23.

Medium Priority

AB 2476	Ellis	Electricity: integrated resource plans: Department of Water Resources: procurement.	DWR Procurement	This bill would additionally authorize the department to procure resources from a pump hydroelectric facility pursuant to the above-described provisions if the pump hydroelectric facility is exempt from Federal Energy Regulatory Commission licensing.	From printer. May be heard in committee March 23.
AB 2493	Petrie-Norris	Electrical corporations: interconnection: transmission: auditor.	Transmission	This bill would require the commission to require each electrical corporation to retain an independent third-party auditor to review certain transmission- and interconnection-related submissions made by the electrical corporation, the electrical corporation's progress on completing network upgrades following approval in a generator interconnection agreement or transmission plan approved by the Independent System Operator, and the electrical corporation's compliance with any remedial actions ordered by the commission, as specified. The bill would require the third-party auditor to report to the commission on an annual basis, as provided. Within 90 days of receiving the auditor's report, the bill would require the commission to issue a resolution directing an electrical corporation to take remedial actions necessary to address any deficiencies identified by the auditor, as specified.	From printer. May be heard in committee March 23.
AB 2508	Hoover	Public Utilities Public Purpose Programs Fund.	Programs	This bill would establish the Public Utilities Public Purpose Programs Fund. The bill would require the commission, upon appropriation by the Legislature, to allocate the moneys in the fund to fund certain public purpose programs and programs administered by electrical regional energy networks, as specified. The bill would require the Controller to transfer an unspecified sum on July 1 of each fiscal year, commencing with the 2026–27 fiscal year, from the Greenhouse Gas Reduction Fund to the fund.	From printer. May be heard in committee March 23.

Medium Priority

AB 2516	Petrie-Norris	California Grid Manufacturing Initiative.	Infrastructure	<p>This bill would require each public utility, as defined, on or before January 1, 2028, to submit to the Energy Unit a projection of its purchasing needs for critical electricity grid components for the period of January 1, 2028, through December 31, 2032, inclusive, as provided. The bill would require the Energy Unit, based on the projections, to determine the statewide aggregate purchasing needs for electricity grid components, as specified. The bill would require a public utility that purchases electricity grid components identified pursuant to the bill to purchase those components from the initiative, except as provided. The bill would permit an electrical corporation, and require the Public Utilities Commission, to authorize the recovery of costs incurred by the electrical corporation in implementing the above-described requirements, and would authorize a local publicly owned electric utility to recover the costs incurred from the implementation of the above-described requirements from its ratepayers. By imposing new duties on local publicly owned electric utilities, the bill would impose a state-mandated local program.</p>	From printer. May be heard in committee March 23.
AB 2518	Sharp-Collins	Public utilities.	Spot Bill	Spot Bill	From printer. May be heard in committee March 23.
AB 2543	Ransom	Emergency preparedness: electric vehicle charging infrastructure.	Spot Bill	Spot Bill	From printer. May be heard in committee March 23.
AB 2554	Addis	Public utilities: regulation.	Spot Bill	Spot Bill	From printer. May be heard in committee March 23.

Medium Priority

AB 2589	Irwin	Public utilities: rates: changes to federal law.	Rates	This bill would require the commission to evaluate the full effect of all federal legislation that becomes law, including the recent federal House Resolution 1 (Public Law 119-21), upon the expenses and tax liabilities incurred by public utilities for payment of federal taxes and, if the commission determines that the projected expenses and tax liabilities for federal taxes that the commission has authorized in the rates for a public utility are materially affected by the enactment, to adjust the rates of the public utility to reflect the changes in projected expenses and tax liabilities in light of the changes in federal law, as specified.	From printer. May be heard in committee March 23.
AB 2611	Bains	Electrical rate schedules: hardships: hot climate zones.	Rates	This bill would require the commission to ensure that each electrical rate schedule does not cause an unreasonable hardship on public schools, or economically vulnerable residential customers, in hot climate zones, as specified. The bill would define several terms for that purpose, including, among others, “unreasonable hardship” to mean an electrical rate schedule that imposes a rate on a public school or economically vulnerable residential customer above the baseline rate during any hour when the temperature is above 90 degrees Fahrenheit for the duration of the hour, as provided.	From printer. May be heard in committee March 23.
AB 2612	Schultz	Building standards: qualified plug-in photovoltaic systems.	Solar	This bill would require the commission, commencing with the next triennial edition of the code, to adopt, approve, codify, and publish mandatory standards for building electrical circuit features to enable qualified plug-in photovoltaic systems to function as an energy source within a residential dwelling’s or nonresidential development’s electrical circuit, as specified. The bill would, for purposes of that requirement, require the department to research, develop, and propose for adoption mandatory building standards for a qualified plug-in photovoltaic system to function as an energy source within a multiunit dwelling’s electrical circuit. The bill would require the commission and the department, in satisfying those requirements, to, among other things, consult with certain interested parties and invite the participation of the public at large in the development of those building standards through open consensus-based processes.	From printer. May be heard in committee March 23.
AB 2618	Connolly	Energy: notification of redirection of moneys authorized for maintenance, safety, or reliability.	Spot Bill	Spot Bill	From printer. May be heard in committee March 23.

Medium Priority

AB 2619	Papan	Water resources: data centers.	Data Centers	This bill would require the Department of Water Resources and the State Energy Resources Conservation and Development Commission to develop, on or before January 1, 2029, guidelines and best practices to maximize the efficient use of natural resources to address the developing and emerging needs of technology in California that are consistent with urban water use objectives under prescribed provisions of law. The bill would specify that these guidelines and best practices include, among others, the use of closed-loop systems and nonpotable water. The bill would also require the department, in coordination with other relevant state agencies, to develop guidance that cities and counties may use for assessing projected water use, water efficiency measures, and cumulative water resource impacts of proposed data centers within the context of local and regional water management objectives.	From printer. May be heard in committee March 23.
AB 2647	Calderon	Energy: nuclear facilities: advanced nuclear reactors.	Nuclear	Existing law prohibits the State Energy Resources Conservation and Development Commission (Energy Commission) from certifying a nuclear fission thermal powerplant, except for specified powerplants, and provides that a nuclear fission thermal powerplant, except those specified powerplants, is not a permitted land use in California unless certain conditions are met regarding the existence of technology for the construction and operation of nuclear fuel rod processing plants and of demonstrated technology or means for the disposal of high-level nuclear waste, as specified. This bill would exempt advanced nuclear reactors, as defined, from that prohibition.	From printer. May be heard in committee March 23.
AB 2680	Arambula	Local publicly owned energy utilities: low-income weatherization programs.	Spot Bill	Spot Bill	From printer. May be heard in committee March 23.
AB 2688	Zbur	Energy: offshore wind infrastructure.	Spot Bill	Spot Bill	From printer. May be heard in committee March 23.

Medium Priority

AB 2695	Gallagher	Public Utilities Commission: reports.	CPUC Reporting	Existing law requires the commission to annually report to the Legislature on its timeliness in resolving cases, information on the disposition of applications for rehearings, and the days that its commissioners presided in and attended hearings, as provided. This bill would require the commission to instead biannually make that report.	From printer. May be heard in committee March 23.
AB 2699	Zbur	Public utilities.	Spot Bill	Spot Bill	From printer. May be heard in committee March 23.
AB 2700	Gallagher	Public utilities: rates.	Spot Bill	Spot Bill	From printer. May be heard in committee March 23.
AB 2710	Bauer-Kahan	Electrical corporations: bankruptcy.	Spot Bill	Spot Bill	From printer. May be heard in committee March 23.
AB 2733	Petrie-Norris	Local agencies.	Spot Bill	Spot Bill	From printer. May be heard in committee March 23.

Medium Priority

AB 2748	Quirk-Silva	Building standards: affordable housing developments: electric vehicle charging.	EV Charging	This bill would exempt a new or existing affordable housing development, as defined, for which a permit application is submitted between January 1, 2025, and December 31, 2035, from the requirements for installation of low power Level 2 or higher electric vehicle charging receptacles in the 2025 California Green Building Standards Code, as provided. The bill would, instead, require those affordable housing developments for which a permit application is submitted between January 1, 2025, and December 31, 2035, to comply with the applicable requirements for installation of low power Level 2 or higher electric vehicle charging receptacles in the 2022 edition of the California Building Standards Code. The bill would repeal these provisions on January 1, 2037. By adding to the duties of local officials, and by expanding the scope of a crime, this bill would impose a state-mandated local program.	From printer. May be heard in committee March 23.
AB 2762	Boerner	Electrical corporations and gas corporations: rates.	Spot Bill	Spot Bill	From printer. May be heard in committee March 23.
SB 222	Wiener	Residential heat pump systems: water heaters and HVAC: installations	Heat Pumps	The bill would require a city, county, or city and county, beginning July 1, 2027, to adopt and offer asynchronous inspections for installations of residential heat pump water heater or heat pump HVAC systems, as defined, that do not require a licensed contractor and building inspector to be simultaneously present during the inspection. The bill would authorize a building inspector to contact the licensed contractor who performed the installation by telephone call or real-time video conferencing during their inspection, and, if the building inspector determines during an asynchronous inspection that there is an issue with an installation of the heat pump water heater or heat pump HVAC system and that the licensed contractor who performed the installation must be present to perform tests or cure the installation, to require the licensed contractor who performed the installation to schedule an additional inspection in which the building inspector and the licensed contractor who performed the installation are required to be simultaneously present during the additional inspection. The bill would specify that these provisions do not require a local entity described above to discontinue offering inspections for the installation of a residential heat pump water heater or heat pump HVAC system where in a building inspector and licensed contractor who performed the installation are simultaneously present.	In Assembly. Read first time. Held at Desk.

Medium Priority

SB 239	Arreguin	Open meetings: teleconferencing: subsidiary body	Teleconferencing	This bill would authorize a subsidiary body, as defined, to use alternative teleconferencing provisions and would impose requirements for notice, agenda, and public participation, as prescribed. The bill would require the subsidiary body to post the agenda at each physical meeting location designated by the subsidiary body, as specified. The bill would require the members of the subsidiary body to visibly appear on camera during the open portion of a meeting that is publicly accessible via the internet or other online platform, as specified. The bill would also require the subsidiary body to list a member of the subsidiary body who participates in a teleconference meeting from a remote location in the minutes of the meeting.	In Assembly. Read first time. Held at Desk.
SB 256	Perez	Electricity: electrical infrastructure: wildfire mitigation.	Infrastructure	This bill would require an electrical corporation, for the description in the wildfire mitigation plan of the preventative strategies and programs to minimize the risk of its electrical lines and equipment causing catastrophic wildfires, to include consideration of areas adjacent to high fire threat areas. The bill would require an electrical corporation's wildfire mitigation plan to consider the impacts on the opportunity for residents within a household who are not the customer of record to subscribe to receive notifications related to deenergization events and communication with public safety partners, identify any lapses in communication coordination during recent past emergency response events with local governments, describe opportunities to collaborate with local governments and other steps that can be taken to establish more efficient communication coordination during future emergency responses, consider undergrounding distribution infrastructure when it is being rebuilt, include an accounting of all transmission facilities, including permanently abandoned facilities, and include a plan for how and when each permanently abandoned facility will be removed and the wildfire mitigation measures that are being implemented to prevent hazards, as provided. The bill would also require electrical corporations to conduct annual wildfire preparedness workshops, as provided.	August 29 hearing: Held in committee and under submission.
SB 327	McNerney	Public utilities: review of accounts: electrical and gas corporations: rates: political influence activities	Electrical Corporations	This bill would prohibit, except as provided, each electrical corporation or gas corporation from recording to accounts that contain expenses that the electrical corporation or gas corporation recovers from ratepayers, or otherwise recovering from ratepayers, direct or indirect costs of opposing the municipalization of electrical or gas service, as specified. The bill would require the commission to monitor and investigate compliance and noncompliance with the prohibition.	In Assembly. Read first time. Held at Desk.

Medium Priority

SB 330	Padilla	Electrical transmission infrastructure: financing	Transmission	This bill would authorize the Governor to establish one or more pilot projects to develop, finance, or operate electrical transmission infrastructure that meet the specified criteria, including, among other things, that the transmission line is identified by the Independent System Operator in its transmission planning process as a project subject to competitive bidding and necessary to support clean energy generation to meet the state’s clean energy goals. The bill would require the Governor to designate existing state agencies, local public agencies, tribal organizations, or joint powers authorities to implement the pilot projects. The bill would authorize the pilot projects to develop, finance, operate, and maintain electrical transmission lines and all works, facilities, improvements, and property, or portions thereof, necessary or convenient for the conveyance of electricity, as specified. The bill would authorize the Governor to issue guidelines regarding application and certification of pilot projects.	July 16 set for second hearing canceled at the request of author.
SB 332	Wahab	Investor-Owned Utilities Accountability Act	IOU Oversight	This bill would require the research institute to conduct the first phase of the comparative analysis and to submit an interim report, on or before December 31, 2026, to the Energy Commission on threshold legal issues, as provided. The bill would require the Energy Commission to convene a group of state attorneys from the legal departments of state agencies that regulate electrical corporations to advise the research institute on the first phase of the comparative analysis, as specified.	August 29 hearing: Held in committee and under submission.

Medium Priority

SB 534	Padilla	Green Empowerment Zone for the Salton Sea and Southeastern Desert Valleys.	Green Empowerment Zone	<p>This bill, until January 1, 2035, would authorize establishment of a Green Empowerment Zone for the Salton Sea and Southeastern Desert Valleys (empowerment zone). The bill would authorize the empowerment zone to be composed of specified land and communities within the Imperial, Eastern Coachella, and Palo Verde Valleys, upon adoption of a resolution by the Imperial County Board of Supervisors, and would provide for the empowerment zone to be governed by a board of directors, as specified. The bill would task the empowerment zone with various duties, including, among other things, identification of projects and programs that will best utilize public dollars, distribute benefits to disinvested communities, and most quickly improve the economic vitality of California’s southeastern desert valleys, as specified, in a coordinated effort to support the development and equitable transition to a clean energy economy. The bill would require the board of directors, beginning on January 1, 2027, to submit an annual progress report to the Legislature and the Governor’s Office of Business and Economic Development, as specified. The bill would require the empowerment zone, commencing on January 1, 2027, as specified, to post the above-described report on its internet website and to submit a letter to the Legislature informing the Legislature that the report has been posted.</p>	Referred to Com. on E.D., G., & H.I.
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Medium Priority

SB 540	Becker and Stern	Independent System Operator: independent regional organization	Regional Organization	<p>This bill would delete provisions providing for the transformation of the ISO into a regional organization. The bill would authorize the ISO and the electrical corporations that are participating transmission owners whose transmission systems are operated by the ISO, in lieu of the ISO managing related energy markets, as provided, to use energy markets governed by an independent regional organization, provided that specified requirements are satisfied. This bill would specify that the above-described provisions do not diminish the PUC’s authority to direct an electrical corporation to withdraw from an energy market governed by an independent regional organization, and would authorize the PUC to direct an electrical corporation to withdraw from an energy market governed by an independent regional organization under specific circumstances. The bill would also require an electrical corporation within the balancing authority of the ISO to withdraw from an energy market governed by an independent regional organization under two specified conditions. This bill would establish the Regional Energy Market Oversight Council, which would be responsible for ensuring that participation in regional energy markets serves the interests of the state. The bill would require the council to approve or disapprove initial participation in the independent regional organization by electrical corporations and any other participating load-serving entities and determine whether electrical corporations and any other participating load-serving entities should be required to withdraw from an energy market governed by the independent regional organization. The bill would require the council to convene a duly noticed public meeting to make a finding of approval or withdrawal of participation in the independent regional organization and would require the council to disapprove of initial participation in the independent regional organization, or order withdrawal, if the council makes any of specified findings.</p>	Joint Rule 61(a)(13) suspended. (Ayes 60. Noes 20. Page 3128.)
SB 742	Perez	Electricity: electrical infrastructure: permanently abandoned facilities: emergency response: liaisons.	Infrastructure	<p>This bill would require the commission, on or before January 1, 2027, to update a general order to require each electrical corporation to remove all permanently abandoned facilities, as specified. This bill would require that an electrical corporation’s wildfire mitigation plan also include an accounting of all transmission facilities, including permanently abandoned transmission facilities, and include a plan for how and when each permanently abandoned transmission facility will be removed and the wildfire mitigation measures that are being implemented to prevent hazards, as provided.</p>	In Assembly. Read first time. Held at Desk.

Medium Priority

SB 804	Archuleta	Hydrogen pipeline safety	Hydrogen	<p>This bill would require the PUC to require that hydrogen pipelines meet specified requirements. The bill would require the PUC to establish, on or before January 1, 2028, and, with the exception specified below, to enforce, standards that meet or exceed those requirements, as provided. The bill would require the Energy Commission to enforce the standards for private, intrastate hydrogen pipelines.</p> <p>The bill would require a hydrogen pipeline owner to maintain accurate records of hydrogen concentration levels within its hydrogen pipeline and any leakage of hydrogen and, on or before December 31 of each year, to submit a report to the PUC detailing compliance with that requirement.</p>	Read second time. Ordered to third reading.
SB 842	Stern	Energy: firm zero-carbon resources	Zero-Carbon Resources	<p>This bill would require commission, on or before December 31, 2026, through a new or ongoing proceeding, to establish or identify a process by which each load-serving entity subject to its jurisdiction may solicit bids and propose projects for new firm zero-carbon resources to meet identified local reliability needs, as provided. The bill would require the report to include, among other things, characterization of the resource attributes vital for local reliability and identification of barriers, including market barriers, to deploying firm zero-carbon resources to enhance local reliability.</p>	From committee: Do pass and re-refer to Com. on APPR. with recommendation: To consent calendar. (Ayes 18. Noes 0.) (July 9). Re-referred to Com. on APPR.
SB 868	Wiener	Electricity: portable solar generation devices	Solar	<p>This bill would exempt a portable solar generation device, as defined, from all interconnection requirements imposed by state law, the commission, electrical corporation rules, or local publicly owned electric utility rules, as specified. The bill would prohibit an electrical corporation or a local publicly owned electric utility from requiring a customer using a portable solar generation device to take specified actions, including, among other things, paying any fee or charge related to the device or the electricity the device feeds into a building's electrical system. The bill would provide that an electrical corporation or a local publicly owned electric utility is not liable for any damage or injury caused by a portable solar generation device.</p>	Referred to Coms. on E., U & C. and JUD.
SB 875	Wiener	Public utilities: eminent domain.	Public Utilities	<p>This bill would specify that if property that has been appropriated to a public use is electrical, gas, or water public utility property that a public entity within the Pacific Gas and Electric Company service area intends to put to the same use, the presumption of a more necessary use is conclusive and not rebuttable. The bill would specify that the above-described litigation expenses provisions do not apply to those proceedings.</p>	From committee with author's amendments. Read second time and amended. Re-referred to Com. on RLS.

Medium Priority

SB 886	Padilla	California Technology Innovation and Ratepayer Protection Act	Data Centers	<p>This bill, the California Technology Innovation and Ratepayer Protection Act, would require the commission, on or before July 1, 2027, to establish or modify an electrical corporation tariff for the interconnection of the participating customer facilities and the transmission, distribution, and generation services to participating customers, as specified. The bill would require the commission, as part of establishing or modifying the electrical corporation tariff, to, at a minimum, establish eligibility criteria for large load customers, as defined, and facilities, evaluate the risks and benefits of this tariff to nonparticipating ratepayers, and ensure that the tariff prevents the creation of stranded costs for, or cost shifts, to nonparticipating ratepayers. The bill would require the tariff to require a large load customer that submits an application for interconnection of a facility to an electrical corporation to disclose whether an application for the same facility has been submitted in other electrical corporation service territories or other jurisdictions and to disclose each instance in which an application for the same facility has been submitted. The bill would also require the tariff to, among other things, assign cost responsibility for all transmission facility upgrades triggered by a facility interconnection to the applicable participating customer and to require an early termination fee to be assessed against any participating customer under specified circumstances. The bill would also require each participating customer to install onsite zero-carbon energy storage, as provided, and each electrical corporation to publish and update maps showing locations where large load customers can interconnect without the need for significant, costly, and time-consuming transmission upgrades.</p>	Referred to Com. on E., U & C.
SB 887	Padilla	California Environmental Quality Act: environmental leadership development projects: data centers.	CEQA / Data Centers	<p>This bill would specify that projects proposed to be carried out or approved by a public agency for the development and operation of a data center, as defined, are not ministerial projects exempt from CEQA. Because the bill would require the public agency to comply with CEQA for those data center projects that would otherwise be exempt from CEQA as ministerial projects, the bill would impose a state-mandated local program.</p>	Set for hearing March 18.
SB 905	Becker	Electrical corporations: nonbypassable charge	Spot Bill	Spot Bill	Referred to Com. on RLS.

Medium Priority

SB 924	Hurtado	Low-income energy assistance	Home Weatherization	This bill would require the commission to require electrical corporations and gas corporations, in performing home weatherization services, to prioritize household affordability, integration of electrification and health and safety measures, and coordinated delivery across fuel types and housing conditions, while preserving flexibility in program design.	Referred to Com. on E., U & C.
SB 925	McNerney	Electrical corporations and gas corporations: ratepayer-funded energy efficiency assistance programs.	Programs	Spot Bill	Referred to Com. on RLS.
SB 943	Becker	Public utilities: electricity: transmission charge: industrial transition usage.	Rates	This bill would authorize the commission to direct an electrical corporation with more than 100,000 service connections in California, when billing an industrial customer for separately metered new load to provide industrial process heat, to apply an adjustment factor to the per kilowatthour rate so as to limit the nonbypassable charge ratio, as specified, in furtherance of facilitating electrification of industrial energy use.	Referred to Com. on E., U & C.
SB 978	Perez	Large-scale energy facilities: labor: electricity rates.	Rates	This bill would require the PUC to establish a special rate structure for large-scale energy users, who would be defined as customers of electrical corporations operating facilities with operational requirements of at least 75 megawatts of electricity, to protect other customers of electrical corporations, prevent cost shifts to those other customers, and require large-scale energy users to pay for the electrical corporations' upfront costs of transmission or distribution infrastructure upgrades necessary for the provision of electrical service to those users. The bill would require the construction of those facilities to comply with certain labor requirements.	Referred to Coms. on E., U & C. and L., P.E. & R.

Medium Priority

SB 1011	McNerney	Energy: Utility Infrastructure AI Safety, Oversight, and Workforce Protection Act.	IOU Oversight	<p>This bill would require the PUC, for a privately owned utility, and the Energy Commission, for a publicly owned utility, to oversee the implementation of a specified program to regulate automated decision systems in connection with certain utility functions. The bill would require privately owned utilities and publicly owned utilities (covered utilities) that employ automated decision systems in the mapping, design, configuration, operation, maintenance, or oversight of electrical or gas infrastructure to maintain a structured process by which qualified personnel are able to modify or override the output of the automated decision systems and to take other specified actions. The bill would prohibit a covered utility from deploying a high-risk automated decision system in its live operational environment unless it files with the PUC or Energy Commission, as appropriate, a safety plan containing certain information, and would require the high-risk automated decision system to operate in staging mode, as provided, before full operational deployment. The bill would require a high-risk automated decision system that creates, modifies, updates, or purports to correct system records to meet certain requirements. The bill would require a covered utility to report to the PUC or Energy Commission, as appropriate, within 24 hours of discovering any event in which a high-risk automated decision system contributed to or caused certain consequences, including a service interruption or outage affecting more than 500 customers, and would require the covered utility, within 30 days of the event, to submit a root-cause report to the PUC or Energy Commission, as appropriate, that includes certain information. The bill would require a covered utility to continuously monitor its high-risk automated decision systems and to submit an annual report to the PUC or Energy Commission, as appropriate, with certain information. The bill would require a covered utility to provide at least 180 days' advance notice, as provided, to affected labor organizations and employees in impacted employee classifications before introducing any technological change involving automated decision systems that materially affects job duties, classifications, staffing levels, or training, and to develop retraining programs, as specified. The bill would prohibit a covered utility from implementing a high-risk automated decision system in its operations that results in the layoff of certain employees unless the covered utility has first exhausted any feasible retraining, redeployment, or reclassification options. The bill would subject a privately owned utility violating its requirements to enforcement pursuant to specified laws. Because the bill would subject a privately owned utility to those specified laws, and because a violation of a PUC action implementing the bill's requirement would be a crime, the bill would impose a state-mandated local program. The bill would require a publicly owned utility to annually certify to its governing board and the Energy Commission its compliance with the bill's requirements and regulations, guidelines, or procedures adopted to implement the bill's requirements.</p>	Referred to Coms. on E., U & C. and P., D.T., & C.P.
SB 1097	Wiener	Energy: permit streamlining.	Spot Bill	Spot Bill	From printer. May be acted upon on or after March 16.

Medium Priority

SB 1158	Stern	Energy: reliability planning assessment.	Transmission	This bill would require that the assessment also include the status of utility transmission upgrades and electrical grid infrastructure capacity, PUC approvals of applications for certificates of public convenience and necessity and permits to construct utility and independent projects, and applications for permits for projects from the Energy Commission and the queue of projects from the Independent System Operator, include the expected completion dates for both system and local resources, and report on the use of fossil fuel by certain facilities constructed by, purchased by, or under contract with, the Department of Water Resources, as specified.	From printer. May be acted upon on or after March 21.
SB 1168	McNerney	Data centers: natural gas and electricity: surcharges.	Data Centers	This bill would impose surcharges, on and after January 1, 2027, on natural gas consumed by a data center, as defined, or a person that consumes natural gas to produce electricity primarily for a data center, at an unspecified rate, and on electricity consumed by a data center that is purchased from an electric utility, which includes an electrical corporation and local publicly owned electric utility, at an unspecified rate. The bill would specify that the above-described surcharges apply to persons that meet specified criteria, including, among other things, that during any single month beginning January 1, 2027, the person purchased natural gas from a gas corporation, or electricity from an electric utility, that was wholly or partially consumed by a data center. The bill would require a gas corporation and electric utility to collect the applicable surcharge from each data center, except as provided. The bill would authorize a person to apply to a gas corporation or electric utility, as applicable, for an exemption from a surcharge, as specified.	From printer. May be acted upon on or after March 21.
SB 1187	Durazo	Open meetings: majority.	Brown Act	This bill would define “majority” for purposes of the act to mean the number of members of the legislative body equaling more than half of the total number of seats on the legislative body. The bill would specify that if a seat on the legislative body is vacant, that seat is to still be counted as a seat on the legislative body.	From printer. May be acted upon on or after March 22.

Medium Priority

SB 1215	Cortese	Electrical corporations: electric vehicle charging stations: multifamily residential properties.	EV Charging	This bill would require the commission, on or before March 1, 2027, to direct electrical corporations to submit Tier 3 advice letters to install Level 2 and Level 3 electric vehicle charging stations and associated equipment and facilities at multifamily housing, with certain parameters, including, among other things, a requirement that each electrical corporation install enough electric vehicle charging stations, on or before December 31, 2037, to at least triple the amount of electric vehicle charging stations in existence, as of January 1, 2027, at multifamily housing in its service territory, and a requirement that an electrical corporation recover all costs for deploying the electric vehicle charging stations and associated equipment and facilities, including the costs for administration and implementation and for equipment, installation, and maintenance on the customer side of the meter, as operations and maintenance costs rather than as capital costs.	From printer. May be acted upon on or after March 22.
SB 1219	Strickland	Energy efficiency programs: discontinuance of administration.	Programs	This bill would require the commission, no later than 180 days after filing, to consider and approve an electrical or gas corporation's application to discontinue administration of an energy efficiency program or an energy efficiency portfolio because the program is not cost effective, not reliable, or, in the case of an electrical corporation, because the program is not being used to meet unmet resource needs in its integrated resources planning framework, as provided. Because a violation of a commission order implementing this provision would be a crime, the bill would impose a state-mandated local program.	From printer. May be acted upon on or after March 22.
SB 1233	Allen	Public utilities: rates.	Spot Bill	Spot Bill	From printer. May be acted upon on or after March 22.
SB 1245	Stern	Renewable energy resources: electrical transmission and distribution grid.	Spot Bill	Spot Bill	From printer. May be acted upon on or after March 22.
SB 1267	Allen	Common interest developments: electric vehicle charging stations owned by members in common areas.	EV Charging	This bill would additionally make the owner and each successive owner responsible for the costs for the above-specified damages resulting from the use of the electric vehicle charging station. The bill would require that the installer of the electric vehicle charging station indemnify or reimburse the association or its members for loss or damage caused by the installation, maintenance, or use of the electric vehicle charging station.	From printer. May be acted upon on or after March 22.

Medium Priority

SB 1282	Becker	Transportation electrification: grid-integrated vehicle technologies: standards.	VGI	This bill would require the Energy Commission, on or before December 31, 2027, to conduct and publish on its internet website an assessment of, among other things, the electrical grid energy supply, reliability, and affordability needs associated with the state’s transition to 100% renewable and zero-carbon energy sources and the target level of grid-integrated vehicle technology use and grid-integrated charging technology-enabled vehicle use necessary to address those needs, as provided. The bill would require the Energy Commission, on or before December 31, 2028, to adopt and implement standards, in consultation with the state board, the PUC, and other relevant local and state agencies, for grid-integrated vehicle technology and associated grid-integrated charging technology of new vehicles, as provided. The bill would require the Energy Commission, before adopting the standards, to conduct at least 3 public workshops to receive public comments, as specified. The bill would require that these standards establish requirements for on-road vehicles of any weight class sold within the state to incorporate grid-integrated vehicle technology and grid-integrated charging technology to achieve those targets, except as specified, and include specified provisions relating to, among other things, classes and types of grid-integrated vehicle technologies that can satisfy those requirements and alternative compliance mechanisms, as provided.	Read first time.
SB 1295	Stern	Energy storage systems: procurement.	Energy Storage	This bill would require the commission, in addition to the requirements described above, on or before January 1, 2030, to consider procurement strategies for the installation of a statewide total of up to 40,000 megawatts of energy storage systems. As part of the procurement strategies considered by the commission, the bill would require the commission to consider appropriate targets, if any, for load-serving entities to procure viable and cost-effective energy storage systems, to be achieved on or before December 31, 2040. If the commission imposes an energy storage system procurement target on load-serving entities, the bill would authorize each load-serving entity to meet up to 50% of its procurement target through energy storage systems that it owns, that are interconnected at the transmission or distribution level, or that are located on the customer side of the meter, as specified. The bill would require the commission to reconsider procurement strategies and appropriate targets not less than once every 3 years.	Read first time.
SB 1300	Stern	California Global Warming Solutions Act of 2006: report.	CARB Reporting	This bill would also require that report to include a discussion of international agreements on the topic of climate change or clean technology innovation that influence the implementation of the scoping plan.	Read first time.

Medium Priority

SB 1350	McNerney	Energy: renewable electrical generation facilities: definition.	Energy Facilities	This bill would revise the definition of “renewable electrical generation facility” to include a facility that uses turbines that use specified fuels.	Read first time.
SB 1354	Archuleta	Energy: renewable energy resources program.	Spot Bill	Spot Bill	Read first time.
SB 1359	Stern	Natural gas: surcharge	Spot Bill	Spot Bill	Read first time.
SB 1370	Stern	Wildfire Fund: report.	Wildfire Fund Reporting	This bill would require the administrator to present those recommendations to specified Senate committees.	Read first time.
SB 1406	McNerney	Public Utilities Commission: contracting: audits.	Spot Bill	Spot Bill	Read first time.
SB 1424	Archuleta	Electric vehicle service equipment: advisory board.	Electric Vehicles	This bill would require the Energy Commission to establish the Electric Vehicle Service Equipment Standards Advisory Board to develop, and recommend to the Energy Commission, state standards for electric vehicle service equipment to ensure safety and reliability throughout the state.	Read first time.



Assembly Bill 1761 – Improving Energy Bill Transparency

Updated: February 18, 2026

Bill Summary

AB 1761 improves transparency to how the Power Charge Indifference Adjustment (PCIA), a charge on nearly all energy bills, is calculated.

Background

Electricity bills in California are on the rise, in part due to challenging market conditions and outdated and inefficient regulatory policies. Families and businesses are feeling the impact. Lawmakers and regulators need practical, consumer-focused solutions that ensure customers do not pay more than their fair share.

One tool to ensure customers receive energy bills that are fair and accurate is increased transparency in how PCIA charges are calculated. The PCIA is a fee designed to ensure customers who leave utility generation service, like customers of a Community Choice Aggregator (CCA) or Energy Service Provider (ESP), pay their portion of legacy power costs. But since the PCIA was implemented, there has been no consistent standard for what data must be made available in any California Public Utilities Commission (CPUC) process or proceeding where the PCIA, or a related charge, is set.

Problem

CCAs, ESPs, and their customers must pay the PCIA charge but often lack access to the data, assumptions, and methods used to set it. This transparency problem leads to disputes, inefficiencies, and unexpected rate impacts for customers. More specifically:

- Disclosures vary by utility and by CPUC proceeding, resulting in repeated fights between CCAs and Investor-Owned Utilities (IOUs) over data access and increased administrative inefficiencies as the CPUC resolves disputes on a case-by-case basis.
- Utilities sometimes make mistakes. In a 2019 PG&E proceeding, CalCCA identified \$73 million in errors (including a \$16 million increase for CCA customers). In a recent proceeding, PG&E identified an accounting error that would have cost CCA customers \$217 million.
- In an ongoing PCIA Rulemaking, the Commission withheld information on the evidence underlying their proposal and the rate impacts of a proposed change. The CPUC did not respond to a Public Records Act request for the information.

Without adequate transparency, CCAs and ESPs are unable to verify the accuracy of the PCIA charges that their customers must pay and cannot confidently forecast rates – both of which are affordability tools needed to protect customers from unexpected rate increases.

Solution

AB 1761 proposes amending the Public Utilities Code to require the CPUC and IOUs to disclose all data used to calculate PCIA costs, including cost inputs, forecasting assumptions, and methodologies. The bill would also ensure that when parties make proposals in a proceeding to change the PCIA they provide all the underlying data informing that proposal. Sensitive information would remain protected through Commission-approved nondisclosure agreements – a practice already used to protect sensitive information in other compliance areas.

Greater transparency allows CCAs and ESPs to better advocate for their customers and assess proposals to change the PCIA. It also can inform cost forecasts and shield customers from sudden rate swings. It reduces repeated fights over information, improves regulatory efficiency, and encourages utilities to verify calculations since the underlying data would be open to review. Costs to implement the proposal are miniscule, as most of this information already exists, while the benefits for rate, accuracy, stability, and consumer protection are substantial. This proposal strengthens confidence that customers pay their fair share — and not more.

For More Information:


Logan Pitts, Legislative Director

Logan.Pitts@asm.ca.gov

(916) 319-2002

Support

California Community Choice Association-
CalCCA(sponsor)



March 2, 2026

Assemblymember Cottie Petrie-Norris
Chair Assembly Committee on Utilities and Energy
1020 N Street, Room 408A Sacramento, CA 95814

Re: AB 1761 (Rogers) - Support

Dear Chair Petrie-Norris,

On behalf of Orange County Power Authority (OCPA), I am pleased to write in strong support of AB 1761 by Assemblymember Chris Rogers, which would improve transparency and predictability in the calculation of the Power Charge Indifference Adjustment (PCIA).

OCPA is a not-for-profit public agency and load-serving entity that offers clean power at stable and competitive rates, significantly reducing greenhouse gas emissions and reinvesting locally in energy programs. Launched in 2022, OCPA serves close to 200,000 customers across Orange County and growing.

Rising electricity costs across California continue to place increasing strain on families and businesses. Addressing affordability requires practical reforms that ensure customers are paying no more than their fair share. AB 1761 represents an important step in that direction.

The PCIA is a charge paid by customers who receive generation service from a Community Choice Aggregator (CCA) rather than an investor-owned utility. It is intended to ensure those customers cover their share of legacy utility power procurement costs. Yet since its creation, there has been no consistent standard governing what information must be disclosed in proceedings at the California Public Utilities Commission when PCIA rates are established or modified.

This lack of transparency creates real challenges for OCPA and the communities we serve. Without access to the data, assumptions, and methodologies underlying PCIA calculations, we are unable to fully verify the accuracy of these charges or confidently forecast future costs. Both verification and predictability are essential tools for protecting our customers from unexpected rate increases.

In addition, inconsistent disclosure practices across utilities and proceedings often result in avoidable disputes and inefficiencies. Errors in past PCIA-related filings have demonstrated the stakes for customers



answers@ocpower.org
(866) 262-7693
P.O. Box 54283
Irvine CA, 92619-4283

www.ocpower.org    



when assumptions or inputs go unexamined. Ensuring that underlying data is available would allow load-serving entities like OCPA to better assess proposals, improve long-term planning, and advocate more effectively on behalf of our ratepayers.

AB 1761 would address these issues by requiring disclosure of the inputs, assumptions, and methodologies used to calculate PCIA costs. It would also ensure that any proposal to modify the PCIA in a regulatory proceeding is supported by the data informing that proposal. Importantly, the bill preserves existing protections for market-sensitive information through nondisclosure agreements already used by the Commission.

Greater transparency will help improve regulatory efficiency, reduce unnecessary disputes, and increase confidence that PCIA charges are fair and accurate. Ultimately, this will better equip OCPA to manage costs and protect our customers from sudden and avoidable rate volatility.

For these reasons, OCPA strongly supports AB 1761 as an important step toward improving affordability and accountability in California's electricity rates.

If you have any questions, please contact Steven Halligan, Regulatory and Legislative Manager, at (949) 767-8700.

Sincerely,

Steven Halligan

Steven Halligan



answers@ocpower.org
(866) 262-7693
P.O. Box 54283
Irvine CA, 92619-4283

www.ocpower.org    

CAPITOL OFFICE
1021 O STREET, SUITE 7630
SACRAMENTO, CA 95814
TEL (916) 651-4018
FAX (916) 651-4918

SAN DIEGO COUNTY DISTRICT OFFICE
780 BAY BOULEVARD, SUITE 204
CHULA VISTA, CA 91910
TEL (619) 409-7690

IMPERIAL COUNTY DISTRICT OFFICE
1224 STATE STREET, SUITE D
EL CENTRO, CA 92243
TEL (760) 335-3442

RIVERSIDE COUNTY DISTRICT OFFICE
82013 DR. CARREON BOULEVARD, SUITE J
INDIO, CA 92201
TEL (760) 398-6442

WWW.SENATE.CA.GOV/PADILLA
SENATOR.PADILLA@SENATE.CA.GOV

California State Senate

SENATOR
STEPHEN C. PADILLA
EIGHTEENTH SENATE DISTRICT



COMMITTEES
INSURANCE
CHAIR
MEMBER
AGRICULTURE
GOVERNMENTAL ORGANIZATION
HEALTH
HOUSING
PRIVACY, DIGITAL TECHNOLOGIES,
& CONSUMER PROTECTION

SB 1138 – Lowering the Cost of California’s Resource Adequacy (RA) Program

Background

California’s Resource Adequacy (RA) program, which ensures there is enough electricity supply to meet customer demand, recently transitioned to a new “Slice-of-Day (SOD)” compliance framework, which requires load-serving entities (LSEs), such as community choice aggregators (CCAs), investor-owned utilities (IOUs) and energy service providers (ESPs), to procure enough RA to meet load obligations in each hour rather than monthly. While this aligns resources more precisely with load, under current rules, LSEs can only buy or sell RA products for the whole month even though obligations are unique to each hour.

Problem

The mismatch between the procurement obligations and transaction rules forces LSEs to purchase more RA than they need to meet their obligations, creating artificial market scarcity and unnecessarily driving up RA demand (and prices). It’s akin to having to buy a crate of oranges when you only need a few slices. These unnecessary costs fall directly on California ratepayers, totaling tens of millions of dollars annually.

Solution

At a time of rapidly rising costs in the electricity sector, policymakers should provide LSEs maximum flexibility in how they contribute their fair share to keep the overall system reliable. SB 1138 would lower the costs to consumers of California’s RA trading program by allowing LSEs to transact RA load obligations on an hourly basis to align with the new slice-of-day RA program.

Benefits

Enabling hourly load obligation trading:

- ✓ Promotes efficiency: LSEs with excess resources in one hour could trade with LSEs that are short, reducing the need to purchase additional RA.
- ✓ Delivers affordability: In 2025, hourly trading could have lowered RA costs for consumers **by avoiding \$105 million in excess RA purchases for summer 2025** and **potentially saving an additional \$77 million annually**.
- ✓ Maintains LSE Responsibility: Creates a new procurement product rather than offering relief from meeting existing requirements
- ✓ Requires limited administrative oversight: Trades can be executed bilaterally with existing RA tracking tools, making the system administratively simple while maintaining each LSE’s full responsibility to meet obligations.

Today's RA rules make it difficult for CCAs to allocate resources efficiently, resulting in unnecessary costs and administrative hurdles. By allowing hourly transactions, CCAs can better match supply to local demand, reduce over-procurement, and protect customers from inflated electricity costs. The system becomes more transparent, predictable, and fair. **These reforms could save tens of millions of dollars each year while maintaining reliability and supporting California's clean energy goals.**

Staff Contact

Name: Emily Zhou


Title: Legislative Aide

Email: Emily.Zhou@sen.ca.gov

Capitol Office: (916) 651 – 4018

Support

- California Community Choice Association (sponsor)



March 2, 2026

Senator Benjamin Allen
Chair Senate Energy, Utilities, and Communications Committee
1021 O Street, Suite 3350
Sacramento, CA 95814

Re: SB 1138 (Padilla) – Support

Dear Senator Allen,

On behalf of Orange County Power Authority (OCPA), I am pleased to express our support for SB 1138, which would improve efficiency and affordability within California's Resource Adequacy (RA) program by allowing load-serving entities to transact RA obligations on an hourly basis.

OCPA is a not-for-profit public agency and load-serving entity that offers clean power at stable and competitive rates, significantly reducing greenhouse gas emissions and reinvesting locally in energy programs. Launched in 2022, OCPA serves close to 200,000 customers across Orange County and growing.

As electricity costs continue to rise across California, it is critical that policymakers pursue practical reforms that reduce unnecessary expenses while maintaining system reliability. SB 1138 offers a thoughtful solution that does both.


California recently transitioned its RA program to a Slice-of-Day compliance structure, requiring load-serving entities (LSE), including CCAs like OCPA, to demonstrate sufficient resources to meet demand in each hour of the day. While this framework improves alignment between resources and system needs, current market rules still require RA to be bought and sold on a monthly basis.

This disconnect between hourly obligations and monthly procurement creates inefficiencies that force LSEs to purchase more RA capacity than is actually needed to meet reliability requirements. The result is artificial scarcity in the RA market and higher costs that are ultimately borne by customers.

SB 1138 would address this mismatch by allowing hourly RA load obligation trading. By enabling load-serving entities with excess capacity



answers@ocpower.org
(866) 262-7693
P.O. Box 54283
Irvine CA, 92619-4283



in one hour to transact with entities that are short in another, the bill would:

- Improve market efficiency by better aligning procurement with actual system needs
- Reduce unnecessary over-procurement
- Lower costs for ratepayers
- Maintain full reliability obligations for all load-serving entities

Importantly, this reform does not weaken reliability standards or reduce procurement responsibilities. Instead, it introduces a more flexible transactional framework that allows providers to meet their existing obligations in a more cost-effective manner.

Today's rigid RA transaction rules limit the ability of community choice aggregators to efficiently manage resources on behalf of their customers. Greater flexibility through hourly trading would allow OCPA to better match supply to local demand and avoid unnecessary expenditures that provide no added reliability value.

At a time when affordability is a growing concern for households and businesses alike, SB 1138 represents a commonsense modernization of the RA program that could save ratepayers tens of millions of dollars annually while maintaining grid reliability.

For these reasons, OCPA supports SB 1138.

If you have any questions, please contact Steven Halligan, Regulatory and Legislative Manager, at (949) 767-8700.

Sincerely,



Steven Halligan



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www.ocpower.org    

**ORANGE COUNTY POWER AUTHORITY
Staff Report – Item 7.4**

To: Orange County Power Authority Board of Directors

From: Saul Viramontes, Administrative Services Manager

Approved By: Joe Mosca, Chief Executive Officer

Subject: STRATEGIC PLAN MONTHLY STATUS REPORT

Date: March 9, 2026

STRATEGIC GOALS

- Enrich & Grow the OCPA Community: _____
- Prioritize Fiscal Sustainability & Affordability: _____
- Design & Deploy Community-Aligned Customer Programs: _____
- Energize Our Community with Renewable Energy: _____
- Raise Awareness of Community Energy & Advocate for Our Customers: _____
- Not Applicable: Project management for Strategic Plan; promote transparency

RECOMMENDED ACTION

Receive and file.

BACKGROUND

On May 12, 2025, the Orange County Power Authority (OCPA) Board of Directors (Board) approved the 2025-26 Strategic Plan. This strategic plan marks the third iteration of the OCPA strategic planning process. This year’s strategic plan includes five (5) strategic goals and 27 objectives. Specific details on the status of each objective, the expected completion date, and the responsible parties are included in Attachment A.

The strategic plan is available online at – <https://www.ocpower.org/strategic-plan>

2025-26 Strategic Goals

1. Enrich and Grow the OCPA Community
2. Prioritize Fiscal Sustainability and Affordability
3. Design and Deploy Community-Aligned Customer Programs
4. Energize Our Community with Renewable Energy Sources
5. Raise Awareness of Community Energy & Advocating for Our Customers

	Not Started	In Progress	Completed
Objectives*	1	17	9

Summary of changes since the last Board meeting:

1.3 Develop educational tools and programs that promote renewable energy for students of all ages, including school partnerships, curriculum support, internship program, youth ambassador program, and community academy.

OCPA staff engaged local students through the OC Leadership Academy, provided a presentation to the Irvine high school students at the Irvine Youth Action Team Summer Camp Cleantech Workshop on June 10, and is sponsoring the Sustain OC Foundation's Sustainable Campus Challenge with high school students. Work has begun on curriculum development in partnership with the OC Department of Education, and a Calpine Community Benefits Grant was awarded to Inside the Outdoors to support their traveling scientist program.

2.3 Explore innovative financing to optimize long-term power procurement costs and educate the board on options.

On October 13, 2025, the Board authorized staff to continue evaluating and preparing for a potential Green Prepayment Bond transaction, including engaging PFM as municipal advisor and Chapman and Cutler as prepay and disclosure counsel. Staff issued an RFP on October 23, 2025, received five proposals by November 7, and completed a structured evaluation on November 18. Based on demonstrated CCA prepay experience, competitive pricing, market reach, and familiarity with OCPA operations, Morgan Stanley & Co. LLC was selected as the preferred prepayment counterparty. Transaction structuring and documentation began in early December 2025 with PFM, Chapman, Morgan Stanley, and CCCFA as the conduit issuer.

On December 8, 2025, the Board approved OCPA's associate membership in CCCFA and authorized CCCFA to serve as bond issuer for a potential 30-year, non-recourse energy prepayment transaction. CCCFA also engaged Orrick as tax and bond counsel to support preparation of substantially final documents. On January 12, 2026, the Board approved the "form of" transaction documents and go-forward thresholds, including a maximum size of \$1.1 billion, a minimum prepaid discount of 8% for the initial period, and a 1.00% cost-of-issuance cap. The bonds will be limited obligations of CCCFA and will not constitute obligations of OCPA. On January 22, 2026, the CCCFA Board unanimously approved OCPA's associate membership.

On February 26, 2026, CCCFA authorized issuance of one or more series of Clean Energy Project Revenue Bonds to finance the energy prepayment transaction on behalf of OCPA, with Morgan Stanley as underwriter and Energy Prepay XI, LLC as energy supplier. The resolution authorizes execution of the principal transaction documents (including the trust

indenture, prepaid energy sales agreement, power supply contract, assignment/custodial agreements, and related swap documents).

The target remains to price and close the transaction in Q1 2026, subject to market conditions, with the objective of maximizing long-term customer savings while maintaining appropriate financial and operational protections.

2.4 Initiate planning for a 0.5MW local renewable energy project in a Disadvantaged Community (DAC) to serve income-qualified residential customers without rooftop solar access. The project will provide 100% renewable energy and a 20% bill discount.

On September 2, Southern California Edison (SCE) filed its formal response to Advice Letter 13-E, expressing support for OCPA’s capacity transfer request. Shortly thereafter, OCPA made additional refinements in accordance with Energy Division guidance and submitted a supplemental Advice Letter on September 17. The supplemental filing further revised the PY2026–2027 budget forecast downward to \$395,051. OCPA anticipates timely CPUC approval of supplemental Advice Letter 13-E by the first quarter of 2026. Upon approval, the agency plans to begin providing interim service using existing renewable resources in the third quarter of 2026. OCPA also anticipates that the Energy Division will prepare a draft decision on its DAC-GT program request for Commission consideration by the first quarter of 2026. In addition, SCE incorporated formal language in its latest 2026 ERRA Forecast filing update to account for OCPA’s DAC-GT budget request in future ERRA forecast updates. On December 31, 2025, the CPUC Energy Division issued Resolution E-5435 proposing approval of OCPA’s DAC-GT program application, or Advice Letter 13-E/E-A filing. It is expected that the Commission will vote out the final approval in early February 2026. OCPA received the CPUC’s final approval of its DAC-GT program application on February 5th. The OCPA team has initiated the internal planning efforts already toward the initial implementation.

3.2 Develop three (3) new customer programs consistent with the needs identified in the Community Needs Assessment of the OCPA Community Power Plan.

The first program from the CPP will launch in March. This will be the only one to launch this year specifically from the CPP, but additional programs will be explored for the following fiscal year.

FISCAL IMPACT

None

ATTACHMENTS

Attachment A – 2025-26 OCPA Strategic Plan Monthly Status Report – March 2026 Update

Strategic Goal	Objective	Progress	Due Date	Assigned To	Status Date	Status Update
#1 Enrich & Grow the OCPA Community	1.1 Present an overview of CCAs and OCPA to two (2) organizations per quarter that cover the wider Orange County region or those that are focused on non-member cities.	In progress	06/08/2026	Director of Communications & External Affairs	11/3/2025	Presented to the Santa Ana Chamber of Commerce on May 13. Linda presented for League of Women Voters.... Climate/Environmental Committee - July 2 In October, we presented at the Fountain Valley Mayor's Breakfast and at the Fullerton Senior Center.
#1 Enrich & Grow the OCPA Community	1.2 Present OCPA to key stakeholders in at least two (2) prospective member cities to promote OCPA's mission and benefits.	Completed	06/01/2026	Director of Communications & External Affairs	11/3/2025	This work continues.
#1 Enrich & Grow the OCPA Community	1.3 Develop educational tools and programs that promote renewable energy for students of all ages, including school partnerships, curriculum support, internship program, youth ambassador program, and community academy.	In progress	06/01/2026	Director of Communications & External Affairs	3/9/2026	OCPA staff engaged local students through the OC Leadership Academy, provided a presentation to the Irvine high school students at the Irvine Youth Action Team Summer Camp Cleantech Workshop on June 10, and is sponsoring the Sustain OC Foundation's Sustainable Campus Challenge with high school students. Work has begun on curriculum development in partnership with the OC Department of Education, and a Calpine Community Benefits Grant was awarded to Inside the Outdoors to support their traveling scientist program.
#1 Enrich & Grow the OCPA Community	1.4 Partner with new local CBOs, including food assistance organizations, to promote state-funded low-income programs widely in member cities, including CARE, FERA, and Medical Baseline.	Completed	12/08/2025	Director of Communications & External Affairs	11/3/2025	OCPA now has a point of contact at Families Forward (Irvine) and has shared program materials, partnered with Pathways of Hope (Fullerton) to promote the community power plan survey, hosted tables at Buena Park food distribution center and Fullerton food distribution center.
#2 Prioritize Fiscal Sustainability & Affordability	2.1 Ensure affordable rates for OCPA customers while covering all expenses and advancing equitable renewable energy initiatives.	Completed	01/12/2026	Chief Financial Officer	1/12/2026	OCPA is actively advancing this strategic goal and remains generally on track, while managing a structurally challenging 2026 environment driven by statewide PCIA and RA MPB changes rather than OCPA-specific decisions. For 2026, OCPA is not increasing its generation rates; the existing 2025 Basic, Smart, and 100% Renewable rates and differentials are being maintained, so any bill increases vs 2025 are primarily due to higher SCE delivery charges outside OCPA's control. Over 2023-2025, SCE's average equivalent residential generation rate has been about 13.7¢/kWh, which is very close to OCPA's proposed 2026 Basic Choice residential rate of about 13.9¢/kWh, demonstrating that the interim 2026 proposal is broadly aligned with recent historical SCE levels even though SCE's 2026 bundled generation rates are temporarily lower on paper. The 2026 interim approach is designed to cover the full projected revenue requirement (approximately \$266 million) when combined with expected green prepayment savings, while stabilizing (but not yet fully restoring) operating reserves at about \$44 million (roughly 22% of expenses), keeping OCPA on a path toward the Board's long-term reserve policy targets and credit-analyst expectations. On the equity and clean energy side, OCPA will continue to provide higher renewable content than SCE (about 49% renewable for Basic, 60% renewable plus 40% carbon-free for Smart, and 100% renewable for the 100% product) and will launch a targeted Green Saver program offering a 10% generation discount on a limited 15 GWh of residential load, prioritized for CARE/FERA and income-qualified customers where feasible. Looking ahead, 2026 will also serve as a bridge and study year, during which staff will develop a cost-based, locally controlled, and competitively informed rate framework for potential 2027 implementation, evaluating cost-based, benchmarking, and hybrid options to ensure that future rates recover costs, remain competitive with SCE on a long-term average basis, support reserve-building in stronger years, and maintain affordability and stability for OCPA customers.
#2 Prioritize Fiscal Sustainability & Affordability	2.2 Strengthen Financial Resilience and Credit Rating Preparation.	In progress	12/8/2026	Chief Financial Officer	1/12/2026	Staff recommends postponing completion of this strategic goal to December 2026 because 2026 is an unusually distortive rate-comparison year, driven by atypical SCE bundled generation rate mechanics and PCIA conditions. In this environment, the interaction of SCE's bundled rate movements and PCIA impacts reinforces that OCPA's near-term financial decisions should prioritize liquidity preservation and rebuilding reserves, rather than initiating a credit rating process. Given these conditions, staff's prudent focus is to stabilize customer rates while protecting the agency's balance sheet, which requires directing available margin toward strengthening operating reserves. OCPA's policy objective is to restore operating reserves to at least 30%; under current projections, the unusual 2026 environment could temporarily cloud comparability and constrain reserve accumulation. Deferring the strategic goal to December 2026 aligns with an expected normalization period and ensures OCPA enters any credit rating process from a position of demonstrated financial resilience, with reserves at or above the 30% threshold.
#2 Prioritize Fiscal Sustainability & Affordability	2.3 Explore innovative financing to optimize long-term power procurement costs and educate the board on options.	Completed	12/08/2025	Chief Financial Officer	3/9/2026	On October 13, 2025, the Board authorized staff to continue evaluating and preparing for a potential Green Prepayment Bond transaction, including engaging PFM as municipal advisor and Chapman and Cutler as prepay and disclosure counsel. Staff issued an RFP on October 23, 2025, received five proposals by November 7, and completed a structured evaluation on November 18. Based on demonstrated CCA prepay experience, competitive pricing, market reach, and familiarity with OCPA operations, Morgan Stanley & Co. LLC was selected as the preferred prepayment counterparty. Transaction structuring and documentation began in early December 2025 with PFM, Chapman, Morgan Stanley, and CCCFA as the conduit issuer. On December 8, 2025, the Board approved OCPA's associate membership in CCCFA and authorized CCCFA to serve as bond issuer for a potential 30-year, non-recourse energy prepayment transaction. CCCFA also engaged Orrick as tax and bond counsel to support preparation of substantially final documents. On January 12, 2026, the Board approved the "form of" transaction documents and go-forward thresholds, including a maximum size of \$1.1 billion, a minimum prepaid discount of 8% for the initial period, and a 1.00% cost-of-issuance cap. The bonds will be limited obligations of CCCFA and will not constitute obligations of OCPA. On January 22, 2026, the CCCFA Board unanimously approved OCPA's associate membership. On February 26, 2026, CCCFA authorized issuance of one or more series of Clean Energy Project Revenue Bonds to finance the energy prepayment transaction on behalf of OCPA, with Morgan Stanley as underwriter and Energy Prepay XI, LLC as energy supplier. The resolution authorizes execution of the principal transaction documents (including the trust indenture, prepaid energy sales agreement, power supply contract, assignment/custodial agreements, and related swap documents). The target remains to price and close the transaction in Q1 2026, subject to market conditions, with the objective of maximizing long-term customer savings while maintaining appropriate financial and operational protections.

#2 Prioritize Fiscal Sustainability & Affordability	2.4 Initiate planning for a 0.5MW local renewable energy project in a Disadvantaged Community (DAC) to serve income-qualified residential customers without rooftop solar access. The project will provide 100% renewable energy and a 20% bill discount.	Completed	01/01/2026	Chief Financial Officer	3/9/2026	On September 2, Southern California Edison (SCE) filed its formal response to Advice Letter 13-E, expressing support for OCPA's capacity transfer request. Shortly thereafter, OCPA made additional refinements in accordance with Energy Division guidance and submitted a supplemental Advice Letter on September 17. The supplemental filing further revised the PY2026–2027 budget forecast downward to \$395,051. OCPA anticipates timely CPUC approval of supplemental Advice Letter 13-E by the first quarter of 2026. Upon approval, the agency plans to begin providing interim service using existing renewable resources in the third quarter of 2026. OCPA also anticipates that the Energy Division will prepare a draft decision on its DAC-GT program request for Commission consideration by the first quarter of 2026. In addition, SCE incorporated formal language in its latest 2026 ERRA Forecast filing update to account for OCPA's DAC-GT budget request in future ERRA forecast updates. On December 31, 2025, the CPUC Energy Division issued Resolution E-5435 proposing approval of OCPA's DAC-GT program application, or Advice Letter 13-E/E-A filing. It is expected that the Commission will vote out the final approval in early February 2026. OCPA received the CPUC's final approval of its DAC-GT program application on February 5th. The OCPA team has initiated the internal planning efforts already toward the initial implementation.
#3 Design & Deploy Community-Aligned Customer Programs	3.1 Finalize the Community Needs Assessment for the Community Power Plan and present the findings and next steps.	In progress	02/09/2026	Director of Communications & External Affairs	12/8/2025	12.1.2025 - The draft Community Power Plan was shared with the Community Advisory Committee on 12/1 and will be open to public comment in December. The final product will be presented to the Board of Directors at their February meeting. 11.3.2025 - The Executive Summary is complete and a draft will be shared with the Community Advisory Committee at their December meeting for feedback. 9.2025 - We are in the final week of gathering community input. The Existing Program Assessment has been drafted and will be completed in September, along with the Funding Opportunity and Internal Needs assessments. The Programs team will share draft program ideas with the CAC in November, followed by broader public feedback in December and a final presentation to the Board in February/March.
#3 Design & Deploy Community-Aligned Customer Programs	3.2 Develop three (3) new customer programs consistent with the needs identified in the Community Needs Assessment of the OCPA Community Power Plan.	In progress	04/01/2026	Director of Communications & External Affairs	3/9/2026	The first program from the CPP will launch in March. This will be the only one to launch this year specifically from the CPP, but additional programs will be explored for the following fiscal year.
#3 Design & Deploy Community-Aligned Customer Programs	3.3 Continue to expand grant and program offerings with a year-over-year growth goal of 25%, respective to total funds allocated, number of applications received, and number of new recipients.	In progress	06/01/2026	Director of Communications & External Affairs	6/3/2025	The summer 2025 Bright Futures Grant will award 60% more than the previous year
#3 Design & Deploy Community-Aligned Customer Programs	3.4 Develop a landing page specifically for low-income residents to connect with programs, including EBD-DI and DAC-GT programs, once launched; and market resource to community partners and networks.	In progress	02/09/2026	Director of Communications & External Affairs	11/3/2025	Preliminary research into programs for this page has begun and will pick up in 1Q26.
#4 Energize Our Community with Renewable Energy Sources	4.1 Implement the first OCPA local generation programs, establishing contracts for developing small-scale distributed storage facilities with a 1-5 megawatt capacity each.	In progress	6/8/2026	Director of Power Resources	1/12/2026	OCPA, potential member cities, and stakeholders have assessed the risk and benefits of partnering to develop small-scale distributed storage facilities in conjunction with renewable energy resources, and due to the current uncertainty and the repeal of the federal tax credits for solar plants, including distributed solar, OCPA will continue to seek opportunities including energy-storage systems developers.
#4 Energize Our Community with Renewable Energy Sources	4.2 Establish precise metrics and effective tools to proficiently identify, avoid, and mitigate market and credit risks for OCPA.	In progress	6/8/2026	Director of Power Resources	1/12/2026	OCPA onboarded Contracts and Compliance Analyst and Power Portfolio Manager who has extensive experience with energy market and the associated risks to develop metrics while identifying market and credit risks. The Power Resources Team will work with FinTech Risk Manager to further develop the OCPA Credit Guidelines for energy procurement.
#4 Energize Our Community with Renewable Energy Sources	4.3 Create local partnerships with clean technology companies to advance emerging long-term energy storage and technologies.	In progress	6/8/2026	Director of Power Resources	1/12/2026	Power Resources team has been in discussions with local developers and clean-tech companies to discuss potential proposals of projects and programs. The ongoing dialogues and new introductions of companies will bring onramps of potential projects.
#4 Energize Our Community with Renewable Energy Sources	4.4 Forge partnerships with other CCAs to acquire shared resources, mitigate development risks, and capitalize on economies of scale.	In progress	6/8/2026	Director of Power Resources	1/12/2026	OCPA has consummated energy resources with other CCAs within California through bilateral agreements and solicitations. OCPA continues to work with other CCAs to consummate agreements to realize mutual benefits. OCPA continues in discussions with other CCAs to jointly participate in solicitations including optimizing resources collaboratively while mitigating market risks.
#4 Energize Our Community with Renewable Energy Sources	4.5 Create a more sustainable electric grid with measurable milestones above California's renewable energy goals.	In progress	6/8/2026	Director of Power Resources	1/12/2026	OCPA has and will continue to achieve more sustainable electric grid with measurable milestones with procurements of renewable energy products above California's RPS requirements. OCPA is on target to continue achieving this goal in FY25/26.
#4 Energize Our Community with Renewable Energy Sources	4.6 Create partnerships with member agencies to identify local development opportunities.	In progress	6/8/2026	Director of Power Resources	1/12/2026	OCPA has introduced and supported efforts with member agencies with regards to local renewable energy and battery energy storage opportunities including potential California's grant opportunities. OCPA will continue to seek opportunities to enable local development opportunities.
#4 Energize Our Community with Renewable Energy Sources	4.7 Release at least two (2) long-term solicitations for renewable energy resources.	In progress	6/8/2026	Director of Power Resources	1/12/2026	Based on the current solicitation efforts conducted in 2025, negotiations continue to develop with the shortlisted projects and much efforts were made by both OCPA staff and the developers who continues to navigate through the uncertainties based on the Federal actions in 2025. OCPA will continue to evaluate the market conditions and determine the feasibility of issuing another solicitation in the first of second quarter of 2026.
#5 Raise Awareness of Community Energy & Advocate for Our Customers	5.1 Develop a toolkit of materials for Board member use in engaging with prospective cities about OCPA.	Completed	12/08/2025	Director of Communications & External Affairs	12/8/2025	A trifold brochure has been created based on Board input, printed and distributed.
#5 Raise Awareness of Community Energy & Advocate for Our Customers	5.2 Host at least two (2) independent pop-up events in member cities per quarter.	In progress	06/01/2026	Director of Communications & External Affairs	11/3/2025	The Communications & External Affairs team has hosted three (3) pop-ups, including: Diamond Jamboree, Irvine: 4/12/25; Fullerton City Hall: 4/15/25; Buena Park City Hall: 5/27/25;

#5 Raise Awareness of Community Energy & Advocate for Our Customers	5.3 Sponsor and help facilitate a small business mixer to build community and opportunities for education about OCPA and renewable energy solutions.	Not started	02/01/2026	Director of Communications & External Affairs		
#5 Raise Awareness of Community Energy & Advocate for Our Customers	5.4 Develop education curricula for elected officials and their staff; provide this training opportunity annually.	In progress	03/01/2026	Director of Communications & External Affairs		
#5 Raise Awareness of Community Energy & Advocate for Our Customers	5.5 Develop working relationships with culturally representative organizations to ensure representative and equitable outreach in the top threshold languages.	Completed	12/08/2025	Director of Communications & External Affairs	12/8/2025	<p>OCPA has begun Community Power Plan outreach work with the Asian Business Association Collective, which will hopefully turn into a long term relationship OCPA's</p> <p>Administrative Service Manager is working with PACE LA to host a procurement series geared towards introducing OCPA and community energy to diverse businesses to help increase local business engagement and economic growth. The first webinar was hosted on July 1, with the next three following on a weekly basis.</p> <p>Recognized by Asian business association, Filipino American chamber of commerce, and the Iranian American chamber of commerce for sustainable and community impact.</p>
#5 Raise Awareness of Community Energy & Advocate for Our Customers	5.6 Enhance OCPA's legislative and regulatory advocacy efforts by developing an advocacy roadmap to engage with key stakeholders and legislators to ensure outcomes consistent with OCPA's strategic goals.	Completed	07/14/2025	Regulatory & Legislative Manager	7/3/2025	<p>Strategic Goal 5.6 in Orange County Power Authority's ("OCPA") 2025-2026 Strategic Plan ("Strategic Plan") is to enhance OCPA's legislative and regulatory advocacy efforts by developing an advocacy roadmap to engage with key stakeholders and legislators to ensure outcomes consistent with OCPA's strategic goals. To create the advocacy roadmap, staff identified over 100 key stakeholder organizations and individuals (75+ organizations, 30+ individuals), researched the legislative and regulatory spaces they are active in and key topics they support and oppose, determined where OCPA and key stakeholders align, prioritized stakeholders, and determined current relationship strength. Staff then created engagement plans based on the type of organization, current relationship, and key issues, and overlaid the roadmap with legislative calendars and regulatory timelines. By enhancing its advocacy capacity, OCPA aims to shape a policy and regulatory landscape that enables greater renewable energy adoption, grid resilience, community empowerment, and competitive rates. Lastly, as part of the Strategic Goal, staff have created an implementation plan and feedback loop to ensure the roadmap stays up to date. Staff will track shifts in stakeholder policies, update relationship status as advocacy is conducted, and make changes to the roadmap as internal policy priorities shift.</p>
#5 Raise Awareness of Community Energy & Advocate for Our Customers	5.7 Develop and implement a regulatory monitoring framework to ensure all departments are consistently informed about regulatory changes and their implications.	Completed	12/08/2025	Regulatory & Legislative Manager		
#5 Raise Awareness of Community Energy & Advocate for Our Customers	5.8 Create a Policy Risk Assessment Guide to help OCPA determine the risk involved with different policy decisions at the state and federal level in both the regulatory and legislative arena.	In progress	06/09/2026	Regulatory & Legislative Manager		

ORANGE COUNTY POWER AUTHORITY
Staff Report – Item 7.5

To: Orange County Power Authority Board of Directors

From: Jacquie Henderson, Director of Communications & External Affairs

Approved By: Joe Mosca, Chief Executive Officer

Subject: PUBLIC OUTREACH UPDATE FOR JANUARY- FEBRUARY 2026

Date: March 9, 2026

RECOMMENDED ACTION

Receive and file.

BACKGROUND

Following is a summary of the Orange County Power Authority (OCPA) Public Outreach efforts for the months of January – February 2026.

Advertising

- Published ads in member city community guides
- Published an ad and advertorial in *Fountain Valley Living*
- Published an ad and advertorial in *World Journal*

Public Outreach

- Produced 2025 Year in Review for the newsletter, website, social media, and community events
- Updated customer enrollment letters with 2026 information

Community Reinvestment

- Visited Buena Park Middle School's FFA Ag Center and promoted its renewable energy and sustainability features made possible by a Bright Future Grant via blog and social posts

Digital Communications

- Distributed February newsletter to 6,127 recipients
- Published “A Note From CEO Joe Mosca: Leaning Into Our Mission and Locking Rates” blog post
- Updated the OCPA website with rate lock communications including a residential plan comparison and new frequently asked questions

Media Relations

- Published three news releases: 2026 Board Chair and Vice Chair appointment; Calpine Community Grants recipients; and 2026 ‘rate lock’ announcement
- Distributed news release for the “Picturing a Better Tomorrow” TK-6 Art Contest

Events

- Black Chamber of Commerce Future Leaders Luncheon
- OCPA Environmental Roundtable
- Irvine Lunar New Year in Great Park
- 4th Annual Santa Ana Mayor’s Prayer Breakfast
- Fountain Valley Mayors Breakfast
- Asian Business Association of Orange County Lunar New Year Luncheon
- OCPA Multicultural Community Leaders Luncheon

Please review the attached public outreach update for additional details on these highlights and the various communications, marketing, and community outreach events. If you would like more information on these events or would like to invite OCPA to future events, please contact Director of Communications and External Affairs, Jacquie Henderson at (949) 767-8707. Your community input is important, thank you for collaborating with OCPA.

FISCAL IMPACT

None

ATTACHMENT

Attachment A - Public Outreach update for January – February 2026.

Public Outreach Update

January – February 2026





HIGHLIGHTS

Advertising

- Published ads in city community guides
- Published an ad and advertorial in *Fountain Valley Living*
- *Published an ad and advertorial in World Journal*

Public Outreach

- Produced 2025 Year in Review for the newsletter, website, social media, and community events
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Community Reinvestment

- Visited Buena Park Middle School's FFA Ag Center and promoted its renewable energy and sustainability features made possible by a Bright Future Grant via blog and social posts



HIGHLIGHTS (Cont.)

Digital Communications

- Distributed February newsletter to 6,127 recipients
- Published “A Note From CEO Joe Mosca: Leaning Into Our Mission and Locking Rates” blog post
- Updated the OCPA website with rate lock communications including a residential plan comparison and new frequently asked questions
- Developed landing pages for the OCPA Community Power Plan

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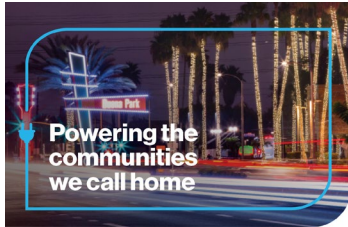
Events

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- OCPA Multicultural Community Leaders Luncheon



ADVERTISING

- Published ads in city community guides



Powering the communities we call home

Orange County Power Authority (OCPA) was created to give residents and businesses a real choice over their energy supply. By purchasing electricity from cleaner sources like wind, solar, and hydroelectric, OCPA offers renewable energy at competitive rates—and reinvests revenue back into our communities.

As a locally governed, not-for-profit provider, OCPA is committed to programs and services that make it easier to save energy, cut costs, and create a healthier future for our community.

Since 2010, OCPA customers have helped reduce **2 billion pounds of carbon emission** equal to taking 250,000 cars off the road.



Cleaner power at competitive rates

Reinvesting into our communities

Locally controlled by community leaders

Offering programs to help save money and energy



Explore your energy options ocpower.org

Buena Park Today



Powering the communities we call home

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Reinvesting into our communities

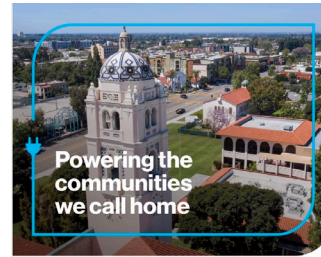
Locally controlled by community leaders

Offering programs to help save money and energy



Explore your energy options ocpower.org

Inside Irvine



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Explore your energy options ocpower.org



Fullerton Connect



Powering the communities we call home

Orange County Power Authority (OCPA) was created to give residents and businesses a real choice over their energy supply. By purchasing electricity from cleaner sources like wind, solar, and hydroelectric, OCPA offers renewable energy at competitive rates—and reinvests revenue back into our communities.

As a locally governed, not-for-profit provider, OCPA is committed to programs and services that make it easier to save energy, cut costs, and create a healthier future for our community.

Since 2010, OCPA customers have helped reduce **2 billion pounds of carbon emission** equal to taking 250,000 cars off the road.



Explore your energy options ocpower.org



Fountain Valley Pen



ADVERTISING

- Published ad and advertorial in the *Fountain Valley Living*



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Since 2022, OCPA customers have helped reduce



2 billion pounds of carbon emission
equal to taking 224,000 cars off the road.



Cleaner power at competitive rates

Reinvesting into our communities

Locally controlled by community leaders

Offering programs to help save money and energy



Explore your energy options
ocpower.org



Fountain Valley, Say Hello to Cleaner Power

Orange County Power Authority is coming to your neighborhood! Welcome to cleaner power that puts the community first.

Something exciting is on the horizon for Fountain Valley that will change the way our community thinks about the power we use every day. Coming soon, residents will have renewable energy options through Orange County Power Authority (OCPA) — a not-for-profit, community-focused energy provider.

OCPA is a new option for your energy generation, where before, the only option was Southern California Edison (SCE). OCPA buys power based on the amount customers use — including the amount customers want to come from renewable sources like solar and wind — and SCE continues to deliver that power through their poles and wires. Customers will still get their bill from SCE, the only change is that the generation line currently attributed to SCE will be attributed to OCPA.

Benefits of Community Energy Through OCPA

As a not-for-profit, OCPA is focused on people and not on profits. Our staff of 63 employees have decades of experience and are dedicated to making a positive impact while providing hands-on support. Instead of sending revenue to shareholders, OCPA reinvests directly into the communities it serves through programs that save customer energy and money. This has included rebates on electric vehicle chargers, residential batteries to store and utilize solar energy, and home appliances from a custom online marketplace. And to ensure a direct connection with member communities, OCPA attends events and supports nonprofit organizations to engage with customers.

Why This Change is Important for Fountain Valley

Joining OCPA means decisions about energy sources, programs, and investments now happen closer to home. OCPA is governed by local leaders from member cities — including Fountain Valley — ensuring policies reflect local priorities and community values. This isn't just about cleaner electricity, it's about strengthening local control and keeping benefits right here in Orange County.

Being part of OCPA also makes Fountain Valley part of a growing movement across California. Over one-third of Californians — 15 million people — are receiving their energy from a community energy provider like OCPA.

Making an Impact

Since launching in 2022, OCPA customers have helped reduce more than 2 billion pounds of carbon from the atmosphere. That's the same amount of emissions emitted from over 223,000 gas-powered cars being driven for an entire year. Just from people choosing OCPA as their energy provider!

In 2024, the California Public Utilities Commission's most recent reporting year, OCPA delivered a power portfolio of 81% renewable energy from 89% carbon-free sources, exceeding California's requirement of 41% renewable energy by a sizable margin. For its efforts, OCPA has been nationally recognized as a top green power provider for two years in a row.

What Fountain Valley Can Expect

When Fountain Valley transitions to OCPA as its energy provider, residents and businesses will automatically receive energy generation from OCPA at the lowest renewable energy plan available. SCE will continue providing energy delivery and sending customer bills.

Customers can opt-up to a plan with more renewable energy or opt-out and remain with SCE. It's easy, flexible, and designed to give you more control. OCPA will be present in the community, making sure residents know their options, and two mail pieces will be sent via direct mail before any changes take place. OCPA has you covered!

This is more than an energy update — it's an investment in the Fountain Valley community. One that gives you more choice, more local control, and more support.

Learn more at ocpower.org.





PUBLIC OUTREACH

- Produced 2025 Year in Review infographic for the newsletter, website and social media

2025 YEAR IN REVIEW
Celebrating another year of accomplishments as Orange County's clean energy provider! Orange County Power Authority (OCPA) is proud to provide customers with the choice of renewable energy at competitive rates to make healthier, more sustainable communities. As a not-for-profit, OCPA is a community-focused and mission-driven to help member cities meet their climate goals and support customers with their energy decisions.

4 Member Communities
Buena Park
Fullerton
Irvine
Fountain Valley

The most recent Power Content Label reflects what OCPA customers value most – clean energy.

OCPA's 2024 aggregate power portfolio was 91% renewable energy sourced from **68% carbon-free resources**

Over 2 billion lbs. of CO2 emissions reduced through procurement of renewable energy since launching service in 2022

3 renewable energy plans
177,000+ residential and commercial customers

OCPA is **one of 25** Community Choice Aggregators (CCA) serving one-third of California – that's over 15 million people!

3 new discount and incentive programs
Charge Share – Issued over 200 rebates for customers to receive low-level charged EV chargers through the OCPA Marketplace.
Battery Storage Rebate – 44 applications approved to date for \$500 rebates on eligible residential battery storage systems purchased through the OCPA Marketplace.
Energy Efficiency Kit – Delivered nearly 1,500 free kits of almost 650 worth of products to support energy savings at home.

5 types of renewable energy purchased

- Solar
- Geothermal
- Wind
- Biomass
- Hydropower

Awarded over \$300,000 in grants to nonprofit organizations for advancing clean energy and sustainability initiatives

Invested \$300,000 in local nonprofit organizations for community connection and engagement

Expanding Our Team
12+ decades of total experience

ocpower.org f in

36 Participated in community events in Buena Park, Fullerton, Fountain Valley and Irvine

5 Organizations awarded **2025 Bright Futures Grants**

7 Organizations received **2025 Calpine Benefits Grants**

4 Organizations honored with **Community Impact Awards**

20+ meetings with state legislator offices to discuss energy-related topics, including customer affordability

120 pieces of state legislation tracked and analyzed

30+ regulatory proceedings monitored

4 Member Communities
Buena Park
Fullerton
Irvine
Fountain Valley
Electric Service Starts Soon

3 renewable energy plans
177,000+ residential and commercial customers

6 Awards and Recognition

- Innovator Green Business from the Green Business Network
- 2025 Energy Visionary Award from the Asian Business Association of Orange County
- Community Sustainability & Partnership Award from the Orange County Business Association of Orange County
- Sustainability Advocate of the Year from the Hispanic Chamber of Commerce, Orange County
- Orange County Business Journal Sustainability Leadership Honor
- Green Region: Resource Conservation and Climate Action Honor from the Southern California Association of Governments

ocpower.org f in

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POWER AUTHORITY

Board & Committee Meetings • Your Options • Billing & Rates • Energy Programs • About Us • Newsroom

December 31, 2025

2025 Year in Review

4 Member Communities
Buena Park
Fullerton
Irvine
Fountain Valley

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Expanding Our Team
12+ decades of total experience

ocpower.org f in



PUBLIC OUTREACH

- Updated Customer Enrollment Letters



POWERING THE COMMUNITIES WE CALL HOME

Notice from your new electricity provider, Orange County Power Authority

YOU CAN NOW ENJOY THE BENEFITS OF CLEAN, RENEWABLE ENERGY AT COMPETITIVE RATES.

As an Orange County Power Authority (OCPA) customer, you are helping to improve air quality by reducing our reliance on fossil fuels. Smart Choice is the default clean energy plan for new customers in your city, but you can choose to level up to the 100% Renewable option – all renewable energy to have the biggest reduction in greenhouse gas emissions – or choose Basic Choice, a lower cost option that still helps you reduce your carbon footprint and net west in our community.

OCPA OFFERS THREE RENEWABLE ENERGY PLANS:



Customers always have the option to opt-out and return to Southern California Edison (SCE).

For Solar, OCPA honors Net Energy Metering (NEM) 2.0 benefits and provides a Net Surplus Compensation rate 10% higher than SCE's prevailing rate. Visit ocpower.org/NEM to learn more about the program.

Continued on back >

ocpower.org



YOUR MONTHLY ELECTRICITY BILL

The amount of energy purchased on your behalf – or “energy generation” – is about 50% of your monthly electricity bill, and is now handled by OCPA. SCE continues to manage the transmission and delivery of energy to your home or business, about 70% of your bill. If you experience a power outage, call SCE.

Each month, you will receive a single bill from SCE, with both SCE transmission and delivery charges and OCPA generation charges. These are not extra or duplicate charges. OCPA simply replaces SCE as your electricity generation source. Visit ocpower.org to understand your bill to learn more.

Source
OCPA buys electricity from renewable sources.

Delivery
SCE delivers the electricity

Customer
You reduce your carbon footprint, just by being an OCPA customer!

EXCLUSIVE PROGRAMS FOR OCPA CUSTOMERS

As a not-for-profit public agency, OCPA is driven by purpose, not profits. Customers can take advantage of energy and money saving programs. Check out our latest offerings at ocpower.org/energy-programs.

CONTACT OCPA TO LEARN MORE

We are here to help! Visit our website at ocpower.org or call us at 1-866-262-7693. Our call center team speaks 26 languages!

IT'S A PRIVILEGE TO PROVIDE YOU WITH RENEWABLE ENERGY AT COMPETITIVE RATES!

To view in 中文, 日本語, español, Tiếng Việt, العربية, Tagalog, 日本語, visit ocpower.org/notice



Terms & Conditions of Service

Enrollment and Opt Out: You have been automatically enrolled with OCPA. You may request to opt out of OCPA at any time by calling 1-866-262-7693 or writing to ocpa@ocpower.org. Please have your account number ready to process your request. There is no fee to opt out of OCPA. Please be advised that if you opt out and return to SCE, you will have the option to return to OCPA for a full year and be subject to SCE's current rates, terms, and conditions of service. For more information on SCE's terms and conditions visit sca.com/california.

Additionally, SCE requires that OCPA customers use one of the following options for returning to SCE generation service: Option 1: Return to SCE generation service at the end of your current billing cycle on SCE's standard rate for six months and transfer rates thereafter on Order 26 Return to SCE generation service after six months' notice, on SCE standard rates.

Accounts will be transferred on the day the electric meter is read and cannot be transferred during the middle of a billing cycle. Opt-out requests received and accepted before 5:00pm prior to a customer's meter read date will be processed for that meter read date. All other opt-out requests will be processed on the subsequent meter read date. Customers who opt out or otherwise stop receiving service from OCPA will be charged for all OCPA electricity used before their OCPA electricity service ends. Customers who return to OCPA service for customers who wish to return to OCPA service after leaving the full year anniversary.

Re-enroll in OCPA service at ocpower.org or by calling 1-866-262-7693.

Rate: Orange County Power Authority generation rates are set to provide cleaner electricity at competitive rates. OCPA rates are subject to

change. Changes to rates will be published at duly noticed public meetings by the OCPA Board of Directors. Changes to OCPA or Southern California Edison rates will impact cost comparisons between OCPA and SCE. SCE's charges OCPA customers a monthly Power Charge Imbalance Adjustment and a Price Relief for Storage. OCPA has accounted for these imbalances in its pricing calculations. Note, that OCPA rates are competitive with SCE rates, even with these fees. Available rates can be reviewed at ocpower.org or by calling 1-866-262-7693.

Billing: You will receive a single monthly bill from SCE that includes OCPA's electric generation charges. SCE collects authorized charges from OCPA customers for delivering power to your home or business and for providing other services. These components of your electric bill are the same whether you buy electricity from OCPA or SCE. OCPA's electric generation charge includes SCE's electric generation charge. OCPA does not include a charge or extra fee. SCE will continue to charge you for electric delivery services. If you opt out of OCPA, SCE will resume charging you for electric generation.

Discount Programs: If you are currently enrolled in the California Alternative Rates for Energy (CARE) program, the Family Electric Rate Assistance (FERA) program, Medical Baseline or Low-Pric, you will continue to receive all benefits and discounts as an OCPA customer.

False to Pay: OCPA may transfer your account to SCE upon 60 calendar days after the end of your bill pay cycle. If your service is transferred to SCE, you will be required to pay any unpaid charges at that time.

Customer Privacy Policy: This policy can be found at ocpower.org/privacy-policy or by calling 1-866-262-7693.

ocpower.org





DIGITAL COMMUNICATIONS

- Distributed February newsletter to 6,127 recipients



Living Our Mission: Locking in 2026 Rates

OCPA is living out its mission and locking in rates to provide customers with electricity bill stability and predictability.

CEO Joe Mosca reflects on our values as a community clean energy provider and shares insight into why OCPA's 2026 generation rates – the 30 percent of the bill that OCPA controls – will stay the same as 2025 generation rates.

OCPA remains committed to our founding principles as a local, not-for-profit energy provider:

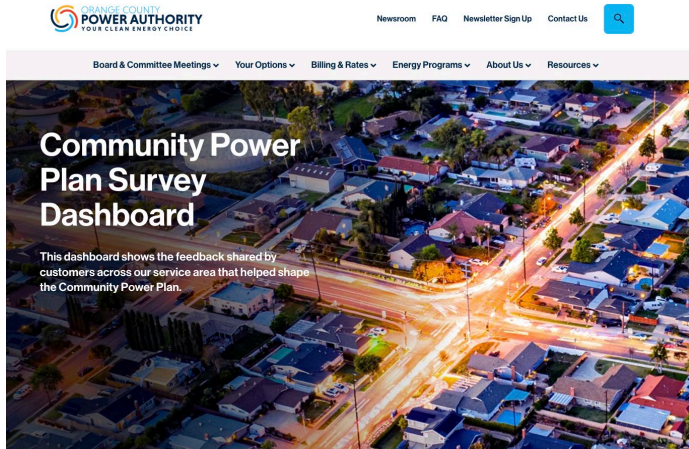
- Reducing greenhouse gas emissions;
- Providing renewable energy choice;
- Championing affordability;
- Reinvesting in our communities; and
- Promoting long-term electric rate stability, energy security, and reliability.

[Read the letter from our CEO »](#)



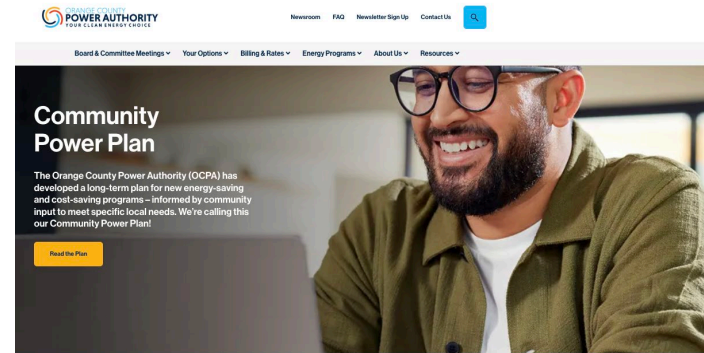
DIGITAL COMMUNICATIONS

- Published the Community Power Plan page and Dashboard



Energy Priorities From Those We Serve

Between January and September 2025, nearly 3,000 community members and businesses shared their thoughts on energy challenges and priorities through Community Power Plan outreach and surveys. The survey results were integrated with the Community Power Plans' other assessment results to determine final program recommendations.



Executive Summary

Purpose and Scope of the Plan

This Community Power Plan (CPP) is a guide to help the Orange County Power Authority (OCPA) to create and run programs to deliver local, clean, and equitable energy. The plan identifies program opportunities that will be impactful and achievable, and offers a clear process for prioritizing and implementing them in phases.

The CPP is a flexible roadmap that can grow and evolve over time. It ensures that OCPA's investments will align with what the community needs, help OCPA meet its goals, and keep the agency on track to lead Orange County's clean energy transition.

Strategic Vision: Local, Sustainable, and Equitable Energy

OCPA's strategic vision is "to thrive globally and act locally by empowering our communities with choice in energy needs. We are committed to transforming the energy landscape, driving a sustainable future and beyond by empowering and enabling our communities, and ensuring that no community is left behind in this transition to renewable energy." This vision guides all aspects of the CPP and defines how OCPA serves its member communities. Local reflects OCPA's commitment to supporting workforce development, economic resilience, and community investment. Sustainable represents OCPA's focus on expanding renewable energy access and accelerating electrification across buildings, transportation, and industry to meet California's climate goals. No



DIGITAL COMMUNICATIONS

- Published “A Note From CEO Joe Mosca: Leaning Into Our Mission and Locking Rates” blog post

A Note From CEO Joe Mosca: Leaning Into Our Mission and Locking Rates



Orange County Power Authority Chief Executive Officer Joe Mosca

A new year brings a fresh start – a moment to reflect, reset priorities, and look ahead. At Orange County Power Authority (OCPA), our priorities are clear and consistent. As your local, not-for-profit energy provider, we remain firmly committed to our founding principles:

- Reducing greenhouse gas emissions
- Expanding renewable energy choice
- Championing affordability
- Reinvesting in our local communities
- Promoting long-term electric rate stability, energy security, and reliability

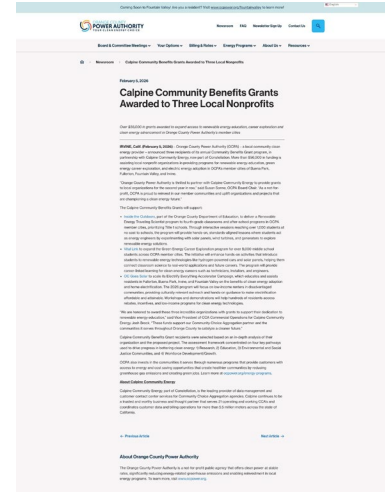
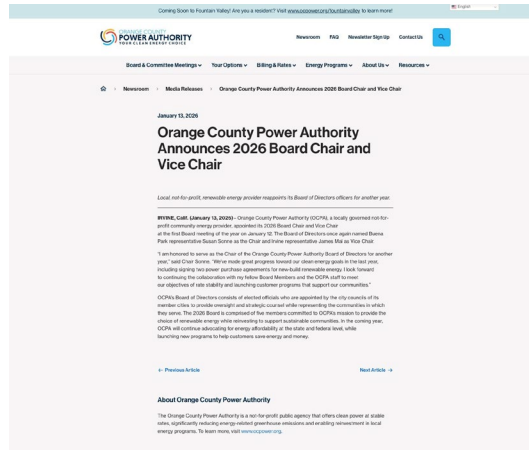
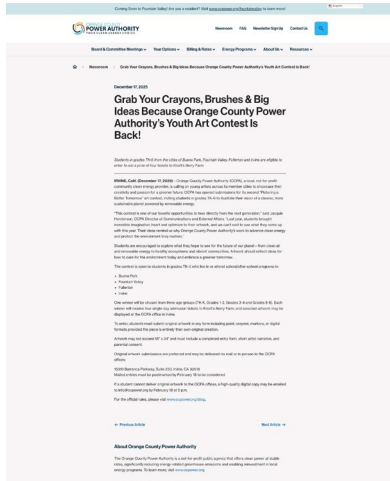
As CEO of OCPA, I am genuinely excited about the opportunities 2026 presents. That may sound surprising given the headwinds facing the clean energy transition at the national level – but meaningful change happens locally. It starts with communities.

In California, Community Choice Energy is proof of that. What began as a response to the 2000–2001



MEDIA RELATIONS

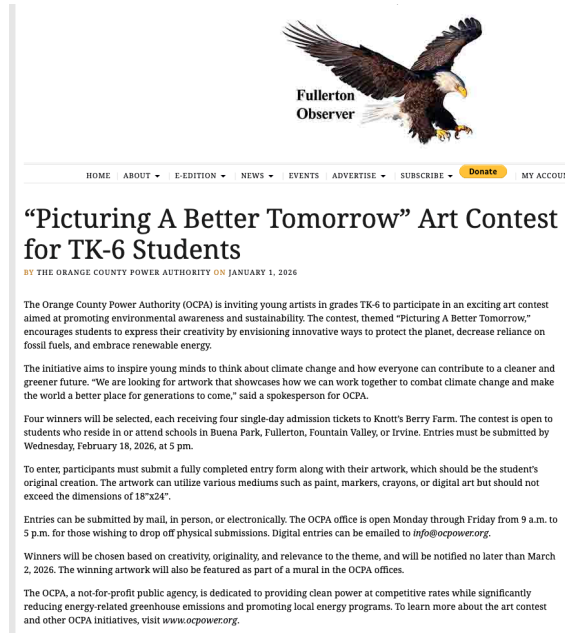
- Published three news releases
 - 2026 Board Chair and Vice Chair appointment
 - Calpine Community Grants Recipients
 - 'Rate Lock'





MEDIA RELATIONS

- Distributed news release for the “Picturing a Better Tomorrow” TK-6 Art Contest



The screenshot shows a news article on the Fullerton Observer website. At the top, there is a logo for the Fullerton Observer featuring an eagle. Below the logo is a navigation bar with links for HOME, ABOUT, E-EDITION, NEWS, EVENTS, ADVERTISE, SUBSCRIBE, a yellow 'Donate' button, and MY ACCOUNT. The article title is “Picturing A Better Tomorrow” Art Contest for TK-6 Students, dated January 1, 2026, by the Orange County Power Authority. The article text describes an art contest for TK-6 students aimed at promoting environmental awareness and sustainability. It details the contest's theme, goals, and submission information, including a deadline of February 18, 2026, at 5 pm. The article also mentions that winners will be selected and their artwork will be featured as part of a mural in the OCPA offices. The OCPA is noted as a not-for-profit public agency dedicated to providing clean power and promoting local energy programs.



EVENTS

JANUARY

FEBRUARY



Black Chamber
Future Leaders
Luncheon



Irvine Lunar New Year



4th Annual Santa Ana
Mayor's Prayer Breakfast



THANK YOU!

ORANGE COUNTY POWER AUTHORITY
Staff Report – Item 7.6

To: Orange County Power Authority Board of Directors

From: Tiffany Law, Chief Financial Officer

Approved by: Joe Mosca, Chief Executive Officer

Subject: TREASURER’S REPORT – FISCAL YEAR ENDED DECEMBER 31, 2025 AND Q4
2025 CHECK REGISTER

Date: March 9, 2026

STRATEGIC GOALS

- Enrich & Grow the OCPA Community: _____
- Prioritize Fiscal Sustainability & Affordability: _____
- Design & Deploy Community-Aligned Customer Programs: _____
- Energize Our Community with Renewable Energy: _____
- Raise Awareness of Community Energy & Advocate for Our Customers: _____
- Not Applicable: _____

RECOMMENDED ACTION

Receive and file.

BACKGROUND

The Treasurer’s Report, representing the financial statement of the Orange County Power Authority (OCPA), is to be presented to the governing body on a quarterly basis. Prepared in accordance with U.S. Generally Accepted Accounting Principles (GAAP), the report includes the statement of net position, the statement of revenues, expenses, and changes in net position, and the statement of cash flows.

For the fiscal year-to-date period from July 1, 2025 through December 31, 2025, OCPA has prepared unaudited financial statements. These are accompanied by budgetary comparisons, an investment summary, a schedule of outstanding debt, and a check register.

ANALYSIS AND DISCUSSION

The unaudited financial statements for the fiscal year ending December 31, 2025, reflect OCPA's stable financial performance. In the first six months of FY 2025/26, OCPA strengthened its financial position by increasing its net position by \$4 million, bringing the total accumulated net position to \$49 million.

FISCAL IMPACT

There is no financial impact from receiving the report.

ATTACHMENT

- A. Treasurer's Report ending December 31, 2025
- B. Q4 2025 Check Register



ACCOUNTANTS' COMPILATION REPORT

Management
Orange County Power Authority

Management is responsible for the accompanying financial statements of Orange County Power Authority (a California Joint Powers Authority) which comprise the statement of net position as of December 31, 2025, and the related statement of revenues, expenses, and changes in net position, and the statement of cash flows for the six months then ended in accordance with accounting principles generally accepted in the United States of America. We have performed a compilation engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. We did not audit or review the accompanying statements nor were we required to perform any procedures to verify the accuracy or completeness of the information provided by management. Accordingly, we do not express an opinion, conclusion, nor provide any assurance on these financial statements.

Management has elected to omit substantially all of the note disclosures required by accounting principles generally accepted in the United States of America in these interim financial statements. Orange County Power Authority's annual audited financial statements include the note disclosures omitted from these interim statements. If the omitted disclosures were included in these financial statements, they might influence the user's conclusions about the Authority's financial position, results of operations, and cash flows. Accordingly, these financial statements are not designed for those who are not informed about such matters.

We are not independent with respect to the Authority because we performed certain accounting services that impaired our independence.

Maher Accountancy

San Rafael, CA
February 2, 2026

ORANGE COUNTY POWER AUTHORITY
STATEMENT OF NET POSITION
As of December 31, 2025

ASSETS

Current assets

Cash - unrestricted	\$ 51,452,144
Cash - restricted	6,312,722
Investments	1,990,181
Accounts receivable, net of allowance	12,186,530
Accrued revenue	11,554,685
Other receivables	2,302,503
Prepaid expenses	2,766,824
Deposits	4,785,226
Total current assets	93,350,815

Noncurrent assets

Cash - restricted	348,438
Deposits	12,597,909
Capital assets, net of depreciation and amortization	990,740
Total noncurrent assets	13,937,087
Total assets	107,287,902

LIABILITIES

Current liabilities

Accrued cost of electricity	48,232,741
Accounts payable	472,376
Other accrued liabilities	786,190
User taxes and energy surcharges due to other governments	633,257
Lease liability	121,044
Total current liabilities	50,245,608

Noncurrent liabilities

Loans payable	7,277,841
Accrued interest	33,531
Lease liability	703,444
Total noncurrent liabilities	8,014,816
Total liabilities	58,260,424

NET POSITION

Net investment in capital assets	166,252
Restricted for security collateral	1,112,722
Unrestricted	47,748,504
Total net position	\$ 49,027,478

**ORANGE COUNTY POWER AUTHORITY
STATEMENT OF REVENUES, EXPENSES
AND CHANGES IN NET POSITION
Six Months Ended December 31, 2025**

OPERATING REVENUES

Electricity sales, net	\$ 133,947,331
Revenue from (deferred to) Rate Stabilization Fund	30,000,000
Other income	24,354
Total operating revenues	163,971,685

OPERATING EXPENSES

Cost of electricity	154,271,019
Contract services	3,125,467
Staff compensation	2,504,592
Other operating expenses	711,749
Depreciation and amortization	97,210
Total operating expenses	160,710,037
Operating income (loss)	3,261,648

NONOPERATING REVENUES (EXPENSES)

Investment income	911,003
Interest expense	(159,615)
Nonoperating revenues (expenses), net	751,388

CHANGE IN NET POSITION

	4,013,036
Net position at beginning of period	45,014,442
Net position at end of period	\$ 49,027,478

ORANGE COUNTY POWER AUTHORITY
STATEMENT OF CASH FLOWS
Six Months Ended December 31, 2025

CASH FLOWS FROM OPERATING ACTIVITIES

Receipts from customers	\$ 140,273,424
Receipts from wholesale sales and other operating receipts	22,034,395
Receipts of security deposits	6,750,000
Payments to suppliers for electricity	(186,899,821)
Payments for other goods and services	(3,952,068)
Payments for deposits and collateral	(1,319,792)
Payments for staff compensation	(2,436,283)
Payments of taxes and energy surcharges to other governments	(1,682,798)
Net cash provided (used) by operating activities	(27,232,943)

CASH FLOWS FROM NONCAPITAL FINANCING ACTIVITIES

Principal payments - bank note	(250,000)
Interest payments	(663,890)
Net cash provided (used) by non-capital financing activities	(913,890)

CASH FLOWS FROM CAPITAL AND RELATED FINANCING ACTIVITIES

Payments of lease	(82,262)
Net cash (used) by capital and related financing activities	(82,262)

CASH FLOWS FROM INVESTING ACTIVITIES

Investment income received	1,215,176
Proceeds from investment sales and maturities of investments	20,000,000
Net cash provided (used) by investing activities	21,215,176

Net change in cash	(7,013,919)
Cash at beginning of period	65,127,223
Cash at end of period	\$ 58,113,304

Reconciliation to the Statement of Net Position

Cash - unrestricted, current	\$ 51,452,144
Cash - restricted, current	6,312,722
Cash - restricted, noncurrent	348,438
Total cash at end of period	\$ 58,113,304

ORANGE COUNTY POWER AUTHORITY
STATEMENT OF CASH FLOWS (continued)
Six Months Ended December 31, 2025

RECONCILIATION OF OPERATING INCOME (LOSS) TO NET CASH PROVIDED (USED) BY OPERATING ACTIVITIES

Operating income (loss)	\$ 3,261,648
Adjustments to reconcile operating income (loss) to net cash provided (used) by operating activities	
Depreciation and amortization expense	97,210
(Increase) decrease in:	
Accounts receivable	2,113,050
Other receivables	2,153,144
Accrued revenue	2,502,909
Prepaid expenses	(2,682,582)
Deposits and other assets	5,565,612
Increase (decrease) in:	
Accrued cost of electricity	(9,777,284)
Accounts payable	(262,899)
Other accrued liabilities	(231,087)
User taxes and energy surcharges due to other governments	27,336
Rate Stabilization Fund	(30,000,000)
Net cash provided (used) by operating activities	\$ (27,232,943)

NONCASH INVESTING ACTIVITIES

Change in fair value of investments	\$ 41,263
Change in interest receivable	\$ (345,436)



ACCOUNTANTS' COMPILATION REPORT

Board of Directors
Orange County Power Authority

Management is responsible for the operating fund budget comparison report of Orange County Power Authority (OCPA), a California Joint Powers Authority, for the six months ended December 31, 2025, and for determining that the budgetary basis of accounting is an acceptable financial reporting framework. We have performed a compilation engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the AICPA. We did not audit or review the accompanying statement nor were we required to perform any procedures to verify the accuracy or completeness of the information provided by management. Accordingly, we do not express an opinion, a conclusion, nor provide any assurance on this special purpose budgetary comparison statement.

The special purpose statement is prepared in accordance with the budgetary basis of accounting, which is a basis of accounting other than accounting principles generally accepted in the United States of America. This report is intended for the information of the Board of Directors of OCPA.

Management has elected to omit substantially all of the note disclosures required by accounting principles generally accepted in the United States of America in these interim financial statements. OCPA's annual audited financial statements include the note disclosures omitted from these interim statements. If the omitted disclosures were included in these financial statements, they might influence the user's conclusions about the Authority's financial position, results of operations, and cash flows. Accordingly, these financial statements are not designed for those who are not informed about such matters.

We are not independent with respect to OCPA because we performed certain accounting services that impaired our independence.

Maher Accountancy

San Rafael, CA
February 2, 2026

ORANGE COUNTY POWER AUTHORITY
OPERATING FUND BUDGET COMPARISON REPORT
Six Months Ended December 31, 2025

	Year-to-Date			Actual as a Percent of Budget	Annual	
	Actual	Budget	Budget Variance (Under) Over		Budget	Budget Variance
OPERATING REVENUES						
Electricity Sales, net	\$ 133,947,331	\$ 132,750,057	\$ 1,197,274	100.9%	\$ 253,149,000	\$ (119,201,669)
Revenue from (deferred to) Rate Stabilization Fund	30,000,000	29,888,000	112,000	100.4%	29,888,000	112,000
Total operating revenues	163,947,331	162,638,057	1,309,274		283,037,000	(119,089,669)
OPERATING EXPENSES						
Cost of Energy	154,271,019	152,416,828	1,854,191	101.2%	269,368,000	(115,096,981)
Data Manager	1,017,343	1,006,780	10,563	101.0%	2,237,000	(1,219,657)
Utilities Service Fees	158,601	240,000	(81,399)	66.1%	480,000	(321,399)
Staffing Costs	2,504,592	2,962,278	(457,686)	84.5%	6,212,000	(3,707,408)
Contract Services	672,213	853,498	(181,285)	78.8%	1,562,000	(889,787)
Legal Services	301,958	351,450	(49,492)	85.9%	756,000	(454,042)
Marketing and Outreach	783,735	873,274	(89,539)	89.7%	1,650,000	(866,265)
Other G&A	547,720	764,655	(216,935)	71.6%	1,787,000	(1,239,280)
Energy Programs	419,414	568,250	(148,836)	73.8%	1,221,000	(801,586)
Total operating expenses	160,676,595	160,037,013	639,582		285,273,000	(124,596,405)
Operating income (loss)	3,270,736	2,601,044	669,692		(2,236,000)	5,506,736
NONOPERATING REVENUES (EXPENSES)						
Investment and miscellaneous income	935,357	1,500,000	(564,643)	62.4%	3,000,000	(2,064,643)
Interest expense	(159,615)	(157,241)	(2,374)	101.5%	(314,000)	154,385
Nonoperating revenues (expenses), net	775,742	1,342,759	(567,017)		2,686,000	(1,910,258)
NET SURPLUS (DEFICIT)	\$ 4,046,478	\$ 3,943,803	\$ 102,675		\$ 450,000	\$ 3,596,478

ORANGE COUNTY POWER AUTHORITY
BUDGET COMPARISON REPORT (CONTINUED)
RECONCILIATION OF NET INCREASE IN AVAILABLE FUND BALANCE
TO CHANGE IN NET POSITION
Six Months Ended December 31, 2025

Net increase (decrease) in available fund balance per budgetary comparison schedule:	\$ 4,046,478
Adjustments needed to reconcile to the changes in net position in the Statement of Revenues, Expenses and Changes in Net Position:	
Subtract depreciation expense	(33,442)
Change in net position	<u>\$ 4,013,036</u>

**ORANGE COUNTY POWER AUTHORITY
BUDGETARY COMPARISON REPORT
Six Months Ended December 31, 2025**

Budget Item	Actual / Budget %	Comment
Electric Sales Revenue	100.9%	Year-to-date energy sales are in very close alignment to forecast. Sales revenue includes revenues actually billed to customers as well as estimated customer usage during the reporting period that is not yet billed.
Cost of Energy	101.2%	The variance is affected by increased energy purchases required to provide for greater than expected customer load. Also affecting the variance is the timing difference between projected and actual delivery of Renewable Energy Certificates (RECs) and fluctuating market prices.
Data Manager	101.0%	These are Calpine fees charged on a per active account basis.
Service Fees - SCE	66.1%	These are SCE fees charged on a per customer basis.
Personnel	84.5%	Staffing expenses are under budget due to the timing delay of new hires.
Professional Services	78.8%	This category includes accounting and audit, rates and financial & planning analysis, portfolio management, scheduling coordinator, HR including recruitment services, IT, and other consultants.
Legal Costs	85.9%	This category includes outside legal costs for general counsel, energy procurement transactional support, labor, clerk support, regulatory, member agency withdrawal services.
Marketing and customer enrollment	89.7%	This category includes advertising, strategic marketing & communications, digital marketing and website development and hosting, collateral marketing, translation, sponsorships & memberships, promotional items, required customer notifications printing and mailing.
Other General & Administrative	71.6%	This category includes ordinary G&A including rent, CalCCA membership, general business insurance, small equipment and software, travel, business meals, professional development, office supplies, and one-off new office related expenses (e.g., open house, office setup, etc.).
Energy Programs	73.8%	Energy program costs include incentives and rebates paid to customers, as well as consulting and G&A costs directly related to the implementation of program activities.
Interest expenses	101.5%	This category includes accrued interest on the loan from the City, as well as imputed interest on the office lease, as required by Governmental Accounting Standards Board Statement No. 87.

ORANGE COUNTY POWER AUTHORITY
Investment Summary
July 1, 2025 through June 30, 2026

Return of Investments	<u>YTD</u>	<u>Jul</u>	<u>Aug</u>	<u>Sep</u>	<u>Oct</u>	<u>Nov</u>	<u>Dec</u>	<u>Jan</u>	<u>Feb</u>	<u>Mar</u>	<u>Apr</u>	<u>May</u>	<u>Jun</u>
INVESTMENTS													
<i>Funds Invested - Average Balance</i>		\$ 48,777,090	\$ 33,353,824	\$ 29,017,248	\$ 34,791,447	\$ 36,012,641	\$ 43,320,247						
<i>Gains/Losses/Interest</i>	\$ 824,374	\$ 198,183	\$ 151,060	\$ 141,406	\$ 101,663	\$ 99,244	\$ 132,819						
<i>Average APY</i>		4.88%	5.43%	5.85%	3.51%	3.31%	3.68%						
OTHER INTEREST													
<i>Gains/Losses/Interest - Other</i>	\$ 86,629	\$ 29,000	\$ 29,000	\$ 11,220	\$ 4,142	\$ 5,809	\$ 7,458						
<i>Total</i>		<u>\$ 911,003</u>											

ORANGE COUNTY POWER AUTHORITY
SCHEDULE OF OUTSTANDING DEBT
As of December 31, 2025

CITY OF IRVINE

On January 2021, OCPA borrowed \$2,500,000 from the City of Irvine for working capital costs associated with OCPA's pre-launch. On September 2021, OCPA borrowed \$5,000,000 from the City of Irvine for cash collateral in the credit facility associated with OCPA's launch. The loan repayment date for the above is January 1, 2027. Interest is due on the loan in an amount based on the gross earnings for the respective quarter as reported in the City Treasurer's pooled investment portfolio report.

Also included as a loan payable are formation related costs - \$152,380 paid directly from the City to the vendors. OCPA will reimburse the City no later than January 1, 2027. Interest does not accrue on the formation costs advanced by the City. OCPA paid \$124,538.70 towards the outstanding principal on September 12, 2022.

Principal	Maturity	Interest Rate	Payments	Outstanding Principal
\$ 152,380	January 2027	0.00%	\$ 124,539	\$ 27,841
\$ 7,500,000	January 2027	Variable - City Treasurer's report	\$ 250,000.00	\$ 7,250,000

US BANKCREDIT FACILITY

On September 2021, OCPA and US Bank (formerly MUFG Union Bank, N.A.) entered into a Revolving Credit Agreement for a \$35 million credit facility, OCPA has outstanding borrowings of \$0 as of December, 2025

Credit Facility	Letter of Credit	Borrowing	Unused Credit
\$ 35,000,000	\$ -	\$ -	\$ 35,000,000

Orange County Power Authority
PAYMENTS ISSUED OCTOBER 1, 2025 THROUGH DECEMBER 31, 2025

<u>Date</u>	<u>Vendor</u>	<u>Description</u>	<u>Amount</u>
10/01/2025	US Bank Interest and Service Charges	Fees on Commercial Loan Amount from 7/1/25-10/01/25	17,888.89
10/02/2025	Asian Business Association Orange County	Milestones 3 & 4 - ABAOC's outreach services supporting OCPA's Community Power Plan	10,000.00
10/02/2025	Bella Cucina	OCPA's 2025 Anniversary Celebration	2,865.73
10/02/2025	BP Energy Company	2025 Physical Emissions	11,800,000.00
10/02/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	3.50
10/02/2025	Select Multimedia	Equipment rental for OCPA's 2025 Anniversary Celebration.	2,940.83
10/02/2025	The Energy Coalition	OCPA Customer Programs through August 31, 2025 - {PO:1041}	27,128.00
10/03/2025	California Community Choice Association	Advance Expense Reimbursement	15,950.00
10/03/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	45.24
10/03/2025	Paychex	Flexperks	22.98
10/03/2025	Travel Bank	Remote Employee Work In-office and September 2025 Board Meeting	729.48
10/06/2025	California ISO (Settlement Invoices) CAISO	CAISO CRR period for 9/12/25 - 9/18/25, 10/1/22 - 10/31/22 & 6/13/25 - 6/19/25	6,492.41
10/06/2025	Calpine Energy Solutions	August 2025 services {po:1003}	160,841.36
10/06/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	15.00
10/06/2025	The Energy Authority Inc. (CAISO and ENERGY)	CAISO period 9/12/25 - 9/18/25 and 6/13/25 - 6/19/25	453,878.42
10/07/2025	AM Conservation Group Inc	32 EV Chargers Rebates {po:1057}	21,542.38
10/07/2025	Dell Marketing L.P.	Dell Pro 16 Plus Computers	4,908.30
10/07/2025	Girl Scouts of Orange County	Girl Scouts of OC Bright Futures Grant 2nd Payment	6,000.00
10/07/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	51.23
10/07/2025	Lakeview Business Center LLC	HVAC and metered electric usage	1,855.63
10/07/2025	Orange County Printing Company	Smart Letter Mailing-- {po: 1048}	687.75
10/07/2025	The Assn of Women in Water, Energy, Environ	Membership application. Level: Individual Membership (Nonprofit/Govt/Not Affiliated)	135.00
10/07/2025	US Bank Interest and Service Charges	September 2025 Custody Fees	22.00
10/08/2025	Cox Business	Internet Services from September 16, 2025 - October 15, 2025	630.00
10/08/2025	We Connect, Inc.	Brivo and Eagle Eye Cloud Services {po:1037}	243.00
10/10/2025	Travel Bank	Parking Fees - CalCCA Board of Directors 3-Day Meeting	114.00
10/14/2025	Best Best & Krieger	September 2025 - Financial/Power Procurement - {po: 1002}	13,846.00
10/14/2025	Best Best & Krieger	September 2025 - County Withdrawal - {po: 1002}	309.00
10/14/2025	Best Best & Krieger	September 2025 - General Counsel - {po: 1002}	10,720.88
10/14/2025	Best Best & Krieger	September 2025 - Public Records Request - {po: 1002}	11,305.00
10/14/2025	Best Best & Krieger	September 2025 - Regulatory CPUC - {po: 1002}	11,061.00
10/14/2025	California ISO (Settlement Invoices) CAISO	CAISO CRR period for 6/20/25-6/25/25, 9/19/25 - 9/25/25, 10/01/24 - 10/31/24 & 12/1/23-12/31/23	1,377.28
10/14/2025	The Energy Authority Inc. (CAISO and ENERGY)	CAISO period 9/19/25 - 9/25/25, 6/20/25 - 6/25/25, 10/01-10/31/24 and 12/1/23-12/31/23	524,053.47
10/15/2025	Employers Preferred Ins. Co	Final premium audit billing for 24-25	2,379.00
10/15/2025	Lincoln Financial Group	10/15/25 Retirement debit 401A	34,611.32
10/15/2025	Lincoln Financial Group	10/15/25 Retirement debit 457B	13,073.44
10/15/2025	Miss Fountain Valley Scholarship Foundation, Inc	Miss Fountain Valley 2026 - Gold Level Sponsorship	2,500.00
10/15/2025	NewGen Strategies & Solutions, LLC	September 2025 - OCPA FY25 Financial Planning & Analysis Support -- {po: 1028}	9,258.75
10/15/2025	Orange County Printing Company	Battery & Care Postcard Project-- {po: 1048}	6,489.81
10/15/2025	SDRMA	November 2025 employee benefit charges	29,034.41
10/15/2025	SORREN CPAs, P.C. Inc.	First progress bill for the June 30, 2025 financial statement audit. {PO:1046}	6,080.00
10/15/2025	Southern California Edison (Non-Energy)	August 2025 service fees	12,726.26
10/15/2025	Sustain OC Foundation	Sustainable Campus Challenge - Module Level Sponsorship	5,000.00
10/15/2025	US Bank Interest and Service Charges	September 2025 Analysis Service Charge	5,136.24
10/16/2025	US Bank Credit Card *7799	OC REGISTER SUBS - The Orange County Register - Monthly Newspaper Subscription Fee	14.00
10/16/2025	US Bank Credit Card *7799	SQ *FOUNTAIN VALLEY ROTARY - Event Ticket - Fountain Valley Rotary Club	100.00
10/16/2025	US Bank Credit Card *7799	OC BUSINESS COUNCIL - Event Ticket - Orange County First Responders Diner	225.00
10/16/2025	US Bank Credit Card *7799	Community Power Plan Survey Participant - Gift Card	255.95
10/16/2025	US Bank Credit Card *7799	Summary of the 16th Annual CA Climate & Energy Collaboration Forum hosted by OCPA	179.83
10/16/2025	US Bank Credit Card *7799	Dancing with the Santa Ana Stars Sponsorship	1,030.18
10/16/2025	US Bank Credit Card *7799	Event Ticket - Placentia Chamber of Commerce State of the City	65.00
10/16/2025	US Bank Credit Card *7799	Reception Ticket - League of California Cities Annual Conference	50.00
10/16/2025	US Bank Credit Card *7799	CEA Department Tabling Supplies	108.44
10/16/2025	US Bank Credit Card *7799	Business Meal - Chair Sonne and Director Jung	120.73
10/16/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - CalCCA Board of Directors Meeting	50.80
10/16/2025	US Bank Credit Card *7799	Business Meal - CalCCA Board of Directors Meeting	6.50
10/16/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - CalCCA Board of Directors Meeting	93.48
10/16/2025	US Bank Credit Card *7799	Hotel Accommodations - CalCCA Board of Directors Meeting (3/Day)	608.76
10/16/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - Board Meeting	82.07
10/16/2025	US Bank Credit Card *7799	Hotel Accommodations - Board Meeting	368.12
10/16/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - Board Meeting	77.69
10/16/2025	US Bank Credit Card *7799	Airfare - Board Meeting	238.97
10/16/2025	US Bank Credit Card *7799	Hotel Accommodations - Board Meeting	351.70
10/16/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - Board Meeting	65.49
10/16/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - Board Meeting	303.96
10/16/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	112.06
10/16/2025	US Bank Credit Card *7799	Business Meals - September 2025 Board Meeting	173.01
10/16/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	76.94
10/16/2025	US Bank Credit Card *7799	Business Meal - All Staff Meeting	49.55
10/16/2025	US Bank Credit Card *7799	Vimeo Annual Software Subscription	900.00
10/16/2025	US Bank Credit Card *7799	GOTOCOM - Phone Forwarding Service for Call Center	145.30
10/16/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	18.53
10/16/2025	US Bank Credit Card *7799	Hotel Accommodations - On-site new staff onboarding and training	767.37
10/16/2025	US Bank Credit Card *7799	Workstation Office Supplies	61.38
10/16/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - On-Site new staff onboarding and training	26.48
10/16/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - On-Site new staff onboarding and training	31.78
10/16/2025	US Bank Credit Card *7799	Kitchen Supplies	80.14
10/16/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - On-Site new staff onboarding and training	28.92
10/16/2025	US Bank Credit Card *7799	Hotel Accommodations - Incorrect Billing	637.03
10/16/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - On-Site new staff onboarding and training	23.92

10/16/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - On-Site new staff onboarding and training	104.36
10/16/2025	US Bank Credit Card *7799	Hotel Accommodation - Reversed Incorrect Billing	(637.03)
10/16/2025	US Bank Credit Card *7799	Staff Recognition Monthly Birthday Cake (2)	93.98
10/16/2025	US Bank Credit Card *7799	Employee Required Training - Workforce Harassment	27.00
10/16/2025	US Bank Credit Card *7799	Adobe Software License	99.06
10/16/2025	US Bank Credit Card *7799	Amazon Monthly Subscription Fee	16.15
10/16/2025	US Bank Credit Card *7799	Kudoboard Subscription Service	29.00
10/16/2025	US Bank Credit Card *7799	HR Recruitment - Power Resource Portfolio Manager	300.00
10/16/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	529.74
10/16/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	198.88
10/16/2025	US Bank Credit Card *7799	Hotel Accommodation - Incorrect Billing	(60.62)
10/16/2025	US Bank Credit Card *7799	Accessed Space - Returned IT Equipment	99.00
10/16/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	93.77
10/16/2025	US Bank Credit Card *7799	ADA Office Supplies	70.12
10/16/2025	US Bank Credit Card *7799	Google Monthly Subscription	14.00
10/16/2025	US Bank Credit Card *7799	Employee Required Training - Workforce Harassment	27.00
10/16/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	48.51
10/16/2025	US Bank Credit Card *7799	Zoom.com Software Subscription	346.90
10/16/2025	US Bank Credit Card *7799	LG ELECTRONICS USA INC	26.55
10/16/2025	US Bank Credit Card *7799	Parking Fee - OC PARKING CIVIC CTR	4.00
10/16/2025	US Bank Credit Card *7799	Airfare - CalCCA Regulatory Directors Meeting	334.95
10/16/2025	US Bank Credit Card *7799	Business Meal - League of CalCities Annual Conference Reception	50.00
10/16/2025	US Bank Credit Card *7799	Business Meal - League of CalCities Annual Conference Reception: Refunded	(50.00)
10/16/2025	US Bank Credit Card *7799	EUCI Professional Development	995.00
10/16/2025	US Bank Credit Card *7799	Office Supplies	27.96
10/17/2025	Travel Bank	Mileage - CEA Travels	223.30
10/17/2025	Travel Bank	Mileage - CEA Travels	99.19
10/20/2025	California ISO (Settlement Invoices) CAISO	CAISO CRR period for 9/1/23 - 9/30/23, 10/1/25-10/2/25, 6/1/25-6/30/25, 9/1/25-9/30/25, 7/1/25-7/2/25 & 11/1/22-11/30/22	4,833.41
10/20/2025	High Desert Power Project LLC	September 2025 Capacity	625,000.00
10/20/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	786.80
10/20/2025	Marsh Landing, LLC	September 2025 Capacity Purchases	671,825.00
10/20/2025	Paychex	Flexperks	22.98
10/20/2025	Southern California Edison	September 2025 Capacity Purchases	1,344,523.90
10/20/2025	The Energy Authority Inc. (CAISO and ENERGY)	CAISO period 9/26/25 - 10/02/25, 6/26/25 - 7/02/25 and 11/1/22 - 11/30/22	46,490.18
10/22/2025	AM Conservation Group Inc	71 EV Chargers Rebates {po:1057}	50,411.83
10/22/2025	Boys & Girls Clubs of Fullerton	2025 OCPA Bright Future Grant	20,000.00
10/22/2025	CITY OF BUENA PARK - UUT	September 2025 Utility User Tax	118,438.16
10/22/2025	City of Fullerton	Special Event Sponsorship Oktoboofest for 2025	1,000.00
10/22/2025	CITY OF HUNTINGON BEACH - UUT	September 2025 Utility User Tax	1,783.75
10/22/2025	CITY OF IRVINE - UUT	September 2025 Utility User Tax	140,750.98
10/22/2025	Climate Action Campaign	2025 Bright Futures Grant	20,000.00
10/22/2025	COR Community Development	2025 Bright Future Grant	20,000.00
10/22/2025	Ektaa Center	Diwali Festival 2025 Sponsorship	2,500.00
10/22/2025	Employment Development Department	A/c ID 143-9372-2 - Payroll tax penalty	530.65
10/22/2025	Golden Communications Inc	Monthly Managed Web Services, and Additional Labor - September 2025 -- {po: 1032}	1,699.00
10/22/2025	INSUREONE INSURANCE SERVICES AMERICA, LLC	06/03/25-06/03/26 - Policy - MN 1854594- Commercial	515.90
10/22/2025	Maher Accountancy	October 2025 - Treasurer and Accounting Services- {PO:1044}	22,000.00
10/22/2025	McCowin Water inc.	Installation and Water Cooler Service	254.00
10/22/2025	Orange County Printing Company	OCPA Postcards and Flyers- {po: 1048}	491.34
10/22/2025	SDI PRESENCE LLC	Services through September 30, 2025 software- {PO:1034}	5,104.31
10/22/2025	The DOT Printer, Inc.	Printing Service related to the Costa Mesa FIPAC meeting.- {PO:1049}	513.84
10/22/2025	The Irvine Co/Lakeview III	November 2025 - Monthly rent	20,367.40
10/22/2025	United States Postal Services (Trust/EPSS Account)	Postage added to USPS Account	65,000.00
10/22/2025	WCF National Insurance Company	5th installment of OCPA Worker's Compensation policy	712.46
10/23/2025	California Community Choice Association	Operational Member Dues - Q2 FY 25-26 Operational Membership Dues Payment	105,000.00
10/23/2025	Calpine Energy Services L.P.	September 2025 Capacity	309,750.00
10/23/2025	Constellation Energy Generation, LLC	August 2025 energy purchases	6,762,311.48
10/23/2025	Just One Call Cleaning Services LLC	September 2025 cleaning services {PO: 1045}	1,300.00
10/23/2025	Lincoln Financial Group	10/23/25 Retirement debit 457B	13,020.34
10/23/2025	Lincoln Financial Group	10/23/25 Retirement debit 401A	27,298.72
10/23/2025	Morgan Stanley Capital Group	September 2025 energy purchases	2,395,360.86
10/23/2025	NRG BUSINESS MARKETING LLC	September 2025 energy purchases	2,646,776.34
10/23/2025	Shell Energy North America	August 2025 Capacity	504,500.00
10/23/2025	Sunrise Power Company LLC	September 2025 capacity purchase	1,556,250.00
10/23/2025	Transalta Energy Marketing Us Inc.	September 2025 Energy Purchases	3,924,833.04
10/27/2025	CAISO (Fees and dues)	Collateral Deposit	1,190,000.00
10/27/2025	Energy Development & Construction Corporation	August 2025 - RECs purchases	43,506.00
10/27/2025	The Energy Authority Inc. (CAISO and ENERGY)	CAISO period 10/03/25 - 10/09/25 & 7/03/25 - 7/10/25	191,512.40
10/31/2025	California Department of Tax and Fee Administration	July - September 2025 Electric Energy Surcharge	192,188.00
10/31/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	100.00
11/03/2025	Argent Institutional Trust Company Inc	Annual Fee: Argent Institutional Trust Annual Administration Fee for period October 29 2025 to October 28 2026	12,500.00
11/03/2025	Calpine Energy Solutions	September 2025 services {po:1003}	160,866.86
11/03/2025	City of Fountain Valley Community Foundation	Hyundai Hope Pm Wheels 5K & Color Run - Bronze Sponsorship	1,000.00
11/03/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	35.00
11/03/2025	Littler Mendelson, PC	September 2025 legal services -- {po:1016}	1,000.00
11/03/2025	Orange County Printing Company	Promotional Items - {po: 1048}	741.32
11/03/2025	Pacific Energy Advisors Inc.	September 2025 - Monthly Services {po: 1008}	51,292.50
11/03/2025	Reveille Inc.	September 2025 OCPA FY Marketing and PR Budget- {po: 1025}	66,086.82
11/03/2025	SDI PRESENCE LLC	Services through September 30, 2025 software- {PO:1034}	831.60
11/03/2025	Southern California Edison (Non-Energy)	September 2025 service fees	57,073.16
11/03/2025	Sustain Southern California	16th Annual Energy Event Tickets (2)	100.00
11/03/2025	The Energy Authority Inc. (CAISO and ENERGY)	CAISO period 10/10/25 - 10/16/25 & 7/11/25 - 7/17/25	140,960.40
11/03/2025	The Energy Authority Inc. (Service Fees)	September 2025 Resource Management Monthly Fees {PO:1011}	15,585.65
11/03/2025	The Energy Coalition	OCPA Customer Programs through September 30, 2025 - {PO:1041}	25,343.37
11/03/2025	Tullett Prebon Americas Corp.	Broker Fees - Southern California Edison - September 2025	3,360.00
11/03/2025	We Mail For You Inc.	Promotional Items	392.09

11/03/2025	WIND SONG CHAPTER OF ABWA	Business Women's Well-Being Conference - Gold Sponsorship	1,000.00
11/04/2025	The DOT Printer, Inc.	Glass Awards (4) - {PO:1049}	947.08
11/04/2025	We Connect, Inc.	Brivo and Eagle Eye Cloud Services {po:1037}	243.00
11/05/2025	Paychex	Flexperks	22.98
11/06/2025	Cox Business	Internet Services from October 16, 2025 - November 15, 2025	630.00
11/06/2025	The DOT Printer, Inc.	2025 OCPA Anniversary Promotion Items - {PO:1049}	495.78
11/06/2025	The DOT Printer, Inc.	2025 OCPA Anniversary Promotion Items - {PO:1049}	372.27
11/07/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	1,835.78
11/07/2025	Lincoln Financial Group	11/07/25 Retirement debit 457B	13,138.41
11/07/2025	Lincoln Financial Group	11/07/25 Retirement debit 401A	27,099.62
11/07/2025	Travel Bank	Mileage - CEA Travels	140.35
11/07/2025	Travel Bank	Mileage - CEA Travels	341.95
11/07/2025	US Bank Interest and Service Charges	October 2025 Custody Charges	32.00
11/10/2025	AM Conservation Group Inc	Sept 2025 Marketplace activity rebate {po:1057}	919.00
11/10/2025	Boys Girls Clubs Of Huntington Valley	2025 Ed Arnold Gala - Great Futures Start Here/Bronze Sponsorship	2,500.00
11/10/2025	City of Irvine	Irvine Loan Early Repayment	913,892.11
11/10/2025	Daroo Korean Performing Arts and Culture	Roar Cultural Festival Sponsorship	4,000.00
11/10/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	1,105.83
11/10/2025	Lakeview Business Center LLC	HVAC and metered electric usage	1,927.76
11/10/2025	Maher Accountancy	Annual Financial Statement Audit Management Fee- {PO:1044}	16,500.00
11/10/2025	NewGen Strategies & Solutions, LLC	October 2025 - OCPA FY25 Financial Planning & Analysis Support -- {po: 1028}	10,681.25
11/10/2025	North Orange County Chamber	2025 S.H.E. Influences Conference & Business Expo Sponsorship	1,500.00
11/10/2025	Orange County Printing Company	Smart Letter Mailing - {po: 1048}	775.17
11/10/2025	SORREN CPAs, P.C. Inc.	Second progress bill for the June 30, 2025 financial statement audit. {PO:1046}	20,064.00
11/10/2025	The Energy Authority Inc. (CAISO and ENERGY)	CAISO period 10/17/25 - 10/23/25, 7/18/25 - 7/24/25, 11/01/24-11/30/24 & 1/1/24-1/31/24	121,411.04
11/10/2025	US Bank TFM ESCROW	Annual Escrow Agent Fee for the period of 07/01/2025-06/30/2026	1,500.00
11/10/2025	WCF National Insurance Company	6th installment of OCPA Worker's Compensation policy	620.86
11/12/2025	Orange County Business Council	Event Ticket - 31st Annual Economic Forecast Conference	200.00
11/14/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	75.00
11/14/2025	SDRMA	December 2025 employee benefit charges	26,206.85
11/14/2025	Southern California Edison	January, February, November and December 2026 IAR Transaction	895,000.00
11/14/2025	Travel Bank	Mileage - CEA Travels	54.32
11/14/2025	Travel Bank	Mileage - CEA Travels	102.20
11/17/2025	Business Meal	All Staff - Team Building	220.89
11/17/2025	Best Best & Krieger	October 2025 - Regulatory - {po: 1002}	5,925.00
11/17/2025	Best Best & Krieger	October 2025 - Financial/Power Procurement - {po: 1002}	8,342.00
11/17/2025	Best Best & Krieger	October 2025 - General Counsel - {po: 1002}	17,527.65
11/17/2025	Best Best & Krieger	October 2025 - County Withdrawal - {po: 1002}	7,454.60
11/17/2025	Best Best & Krieger	October 2025 - Public Records Requests - {po: 1002}	6,835.00
11/17/2025	Buena Park Noon Lions Silverado Days	Silverado Days Silver Sponsorship	1,000.00
11/17/2025	City of Fullerton	Veteran's Day 2025 Celebration - Honor Guard Sponsorship Level	1,500.00
11/17/2025	Fullerton Education Foundation	Bright Futures Grant Recipient for 2025	18,350.00
11/17/2025	Greater Irvine Chamber of Commerce	Irvine Chamber Membership Renewal	724.00
11/17/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	20.00
11/17/2025	McCowin Water inc.	Monthly Lease Payment	79.00
11/17/2025	Reveille Inc.	October 2025 OCPA FY Marketing and PR Budget- {po: 1025}	102,251.11
11/17/2025	The DOT Printer, Inc.	Promotional Items - {PO:1049}	475.34
11/17/2025	The Energy Authority Inc. (CAISO and ENERGY)	CAISO period 10/24/25 - 10/30/25, 7/25/25 - 7/31/25	206,719.79
11/17/2025	The Irvine Co/Lakeview III	December 2025 - Monthly rent	20,367.40
11/17/2025	US Bank Credit Card *7799	OC Register Monthly Subscription	14.00
11/17/2025	US Bank Credit Card *7799	Outreach Supplies - Irvine Global Village Event	73.24
11/17/2025	US Bank Credit Card *7799	Meeting with Orange County Business Council President Paul Simmonds	8.35
11/17/2025	US Bank Credit Card *7799	Outreach Supplies - Irvine Global Village Event	78.92
11/17/2025	US Bank Credit Card *7799	Parking Fee - California Cities Conference Center	15.00
11/17/2025	US Bank Credit Card *7799	California Cities Convention Center	8.84
11/17/2025	US Bank Credit Card *7799	CEA Department Tabling Supplies	134.94
11/17/2025	US Bank Credit Card *7799	Event Ticket - Santa Ana Chamber of Commerce Vision Makers	32.00
11/17/2025	US Bank Credit Card *7799	Event Tickets (2) - OC Forum Signature Housing Luncheon	260.73
11/17/2025	US Bank Credit Card *7799	Working Lunch - CEA Team Month Recap and Feedback	122.83
11/17/2025	US Bank Credit Card *7799	OC Register Monthly Subscription	14.00
11/17/2025	US Bank Credit Card *7799	Business Meal - CEO and Chair Sonne	76.82
11/17/2025	US Bank Credit Card *7799	Parking Fee - CalCities Annual Conference in Long Beach.	15.00
11/17/2025	US Bank Credit Card *7799	Business Meal - CalCities Annual Conference OCPA and Board Members Recap	160.51
11/17/2025	US Bank Credit Card *7799	Hotel Accommodations - League of California Cities Conference	288.16
11/17/2025	US Bank Credit Card *7799	Working Lunch with OCPA Senior Staff	84.31
11/17/2025	US Bank Credit Card *7799	Business Meal - CCA CEO Karen Burns, SDCP, and Girish Balachandran, Former CEO of SVCE	43.77
11/17/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - NLLP Leadership	33.59
11/17/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - NLLP Leadership	33.99
11/17/2025	US Bank Credit Card *7799	Business Meal - NLLP Leadership Meeting	6.87
11/17/2025	US Bank Credit Card *7799	Parking Fees - NLLP Leadership Meeting	76.00
11/17/2025	US Bank Credit Card *7799	Parking Fee - Irvine Conference of International & Transnational Youth (ICITY) Youth Summit	16.00
11/17/2025	US Bank Credit Card *7799	Employee Recognition Cards (8) - 2025 OCPA Outstanding Team Members of the Year	200.00
11/17/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - Special Board Meeting and OCPA Team Building	13.60
11/17/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - Special Board Meeting and OCPA Team Building	16.12
11/17/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - Special Board Meeting and OCPA Team Building	14.68
11/17/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - Special Board Meeting and OCPA Team Building	15.61
11/17/2025	US Bank Credit Card *7799	Airfare - Special Board Meeting and OCPA Team Building	294.28
11/17/2025	US Bank Credit Card *7799	Hotel Accommodations - Special Board Meeting and OCPA Team Building	117.87
11/17/2025	US Bank Credit Card *7799	Hotel Accommodations - Special Board Meeting and OCPA Team Building	117.87
11/17/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - Special Board Meeting and OCPA Team Building	72.00
11/17/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - Special Board Meeting and OCPA Team Building	94.50
11/17/2025	US Bank Credit Card *7799	Hotel Accommodations - Special Board Meeting and OCPA Team Building	117.87
11/17/2025	US Bank Credit Card *7799	Airfare - Special Board Meeting and OCPA Team Building	318.97
11/17/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - Special Board Meeting and OCPA Team Building	1.75
11/17/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	67.15
11/17/2025	US Bank Credit Card *7799	HR Recruitment - External Affairs Manager	591.00

11/17/2025	US Bank Credit Card *7799	New Hire Background Checks and Education Verification	546.66
11/17/2025	US Bank Credit Card *7799	Office Supplies	14.00
11/17/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	270.83
11/17/2025	US Bank Credit Card *7799	Board Meeting	117.73
11/17/2025	US Bank Credit Card *7799	Phone Forwarding Service for Call Center	162.83
11/17/2025	US Bank Credit Card *7799	Office supplies	38.64
11/17/2025	US Bank Credit Card *7799	Office Supplies	50.27
11/17/2025	US Bank Credit Card *7799	OCPA Staff Anniversary Recognition	90.85
11/17/2025	US Bank Credit Card *7799	Office Supplies	39.74
11/17/2025	US Bank Credit Card *7799	Employee Required Training - Workforce Harassment	27.00
11/17/2025	US Bank Credit Card *7799	Staff Recognition Monthly Birthday Cake	53.86
11/17/2025	US Bank Credit Card *7799	Business Meals - Special Board Meeting	126.54
11/17/2025	US Bank Credit Card *7799	Amazon - Monthly Subscription	16.15
11/17/2025	US Bank Credit Card *7799	Irvine Lanes OCPA 2025 Teambuilding	50.00
11/17/2025	US Bank Credit Card *7799	Office Supplies	77.85
11/17/2025	US Bank Credit Card *7799	Office Supplies	95.90
11/17/2025	US Bank Credit Card *7799	HR Recruitment - External Affairs Manager	325.00
11/17/2025	US Bank Credit Card *7799	Google Monthly Subscription	14.00
11/17/2025	US Bank Credit Card *7799	Business Meal - All Staff Monthly Meeting	84.13
11/17/2025	US Bank Credit Card *7799	Office Supplies - White Boards (Two Item Receipt)	203.86
11/17/2025	US Bank Credit Card *7799	Office Supplies	7.53
11/17/2025	US Bank Credit Card *7799	Business Meal - Winter Celebration (First Payment)	583.00
11/17/2025	US Bank Credit Card *7799	Zoom monthly subscription	346.90
11/17/2025	US Bank Credit Card *7799	New Hire Background Checks and Education Verification	202.19
11/17/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	13.28
11/17/2025	US Bank Credit Card *7799	Parking Fees - CalCities Conference.	15.00
11/17/2025	US Bank Credit Card *7799	Airfare - December Board Meeting, Holiday Party, and Training with New Power Service Department Staff	387.96
11/17/2025	US Bank Credit Card *7799	Airfare - NLLP Leadership Meeting	338.61
11/17/2025	US Bank Credit Card *7799	Hotel Accommodation - NLLP Leadership Meeting	293.94
11/17/2025	US Bank Interest and Service Charges	October 2025 Analysis service charge	6,894.70
11/19/2025	Lincoln Financial Group	401(a) plan Q3 2025	5,483.52
11/20/2025	Golden Communications Inc	Monthly Managed Web Services, and Additional Labor - October 2025 -- {po: 1032}	1,849.00
11/20/2025	High Desert Power Project LLC	October 2025 Capacity	625,000.00
11/20/2025	Just One Call Cleaning Services LLC	October 2025 cleaning services {PO: 1045}	1,300.00
11/20/2025	Marsh Landing, LLC	October 2025 Capacity Purchases	689,587.50
11/20/2025	Pacific Energy Advisors Inc.	October 2025 - Monthly Services {po: 1043}	49,000.00
11/20/2025	Paychex	Flexperks	28.71
11/20/2025	The DOT Printer, Inc.	Promotional Items {PO:1049}	797.10
11/20/2025	The Energy Authority Inc. (Service Fees)	October 2025 Resource Management Monthly Fees {PO:1011}	15,585.65
11/21/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	208.33
11/21/2025	Lincoln Financial Group	457B(B) plan Q3 2025	1,969.17
11/21/2025	Southern California Edison	March 2026 to October 2026 IAR transaction	1,790,000.00
11/24/2025	California ISO (Settlement Invoices) CAISO	CAISO CRR period for 2/1/23 - 2/28/23, 8/1/25-8/7/25, 11/1/25-11/06/25, 10/1/25-10/31/25	3,340.49
11/24/2025	Calpine Energy Services L.P.	October 2025 Capacity	309,750.00
11/24/2025	Chapman And Cutler LLP	Legal fee - US Bank for the Consent and Waiver Agreement related to Irvine's early loan repayment	7,500.00
11/24/2025	CITY OF BUENA PARK - UUT	October 2025 Utility User Tax	129,196.05
11/24/2025	CITY OF HUNTINGTON BEACH - UUT	October 2025 Utility User Tax	1,739.41
11/24/2025	CITY OF IRVINE - UUT	October 2025 Utility User Tax	158,041.82
11/24/2025	Constellation Energy Generation, LLC	September 2025 energy purchases	5,818,822.86
11/24/2025	Energy Development & Construction Corporation	September 2025 - RECs purchases	29,718.00
11/24/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	20.00
11/24/2025	Lincoln Financial Group	11/24/25 Retirement debit 401A	24,949.48
11/24/2025	Lincoln Financial Group	11/24/25 Retirement debit 457B	12,890.97
11/24/2025	Littler Mendelson, PC	October 2025 legal services -- {po:1016}	6,916.00
11/24/2025	Maher Accountancy	November 2025 - Treasurer and Accounting Services- {PO:1044}	22,000.00
11/24/2025	Morgan Stanley Capital Group	October 2025 energy purchases	2,299,255.52
11/24/2025	NRG BUSINESS MARKETING LLC	October 2025 energy purchases	2,190,986.87
11/24/2025	Oak Valley College	Santa Ana Chamber - Ambassador Meeting - Sponsorship	78.38
11/24/2025	Orange County Printing Company	Smart Letter Mailing- {po: 1048}	583.69
11/24/2025	Sunrise Power Company LLC	October 2025 capacity purchase	1,556,250.00
11/24/2025	The Energy Authority Inc. (CAISO and ENERGY)	CAISO period 10/31/25 - 11/06/25, 8/01/25 - 8/07/25	154,962.72
11/24/2025	The Energy Coalition	OCPA Residential Battery Rebate Program {PO:1041}	1,000.00
11/24/2025	Transalta Energy Marketing Us Inc.	October 2025 Energy Purchases	3,271,738.89
11/26/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	100.00
11/28/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	10.00
12/01/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	19.09
12/03/2025	California ISO (Settlement Invoices) CAISO	CAISO CRR period for 3/1/23 - 3/31/23, 8/8/25-8/14/25, 11/7/25-11/13/25	1,164.32
12/03/2025	The Energy Authority Inc. (CAISO and ENERGY)	CAISO period 11/07/25 - 11/13/25, 8/08/25 - 8/14/25	245,670.68
12/04/2025	Calpine Energy Solutions	October 2025 services {po:1003}	160,052.56
12/04/2025	Paychex	Flexperks	21.06
12/05/2025	Amperon	Subscription fee for Meter Demand for the term starting 05/15/2025 and ending 05/14/2026 {PO: 1036}	15,500.00
12/05/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	205.00
12/05/2025	Metrolink	2025 Metrolink Holiday Express Train Sponsorship	2,500.00
12/05/2025	US Bank Interest and Service Charges	November 2025 Custody Charges	22.00
12/08/2025	Bentham Paulos	Monthly licensing and maintenance fee of Aug, Sept, Oct 2025	1,500.00
12/08/2025	Best Best & Krieger	November 2025 - Labor and Employment - {po: 1002}	1,040.00
12/08/2025	Best Best & Krieger	November 2025 - General Counsel- {po: 1002}	5,059.02
12/08/2025	Best Best & Krieger	November 2025 - Regulatory - CPUC - {po: 1002}	11,744.00
12/08/2025	Best Best & Krieger	November 2025 - Public Records Request - {po: 1002}	6,307.00
12/08/2025	Best Best & Krieger	November 2025 - Special Counsel - {po: 1002}	43.00
12/08/2025	Best Best & Krieger	November 2025 - Financial/Power Procurement - {po: 1002}	3,999.00
12/08/2025	Best Best & Krieger	November 2025 - County Withdrawal - {po: 1002}	6,040.30
12/08/2025	City of Fountain Valley Community Foundation	Tree Lighting Sponsorship	500.00
12/08/2025	City of Fullerton	Tree Lighting Sponsorship	1,000.00
12/08/2025	Cox Business	Internet Services from November 16, 2025 - December 15, 2025	630.00
12/08/2025	EBEE Connect Inc	Multi-Language Translation Services	803.16

12/08/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	208.33
12/08/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	164.00
12/08/2025	Maher Accountancy	July - October 2025 - Bill.com pass-through fees- {PO:1044}	813.40
12/08/2025	NewGen Strategies & Solutions, LLC	November 2025 - OCPA FY26 Financial Planning & Analysis Support -- {po: 1028}	600.00
12/08/2025	Orange County Printing Company	Power content label mailer - {po: 1048}	22,040.52
12/08/2025	Orange County Printing Company	Promotional Items - {po: 1048}	3,756.80
12/08/2025	Orange County Printing Company	Smart Letter Mailing- {po: 1048}	655.73
12/08/2025	Orange County Printing Company	CEA Outreach Supplies - {po: 1048}	451.48
12/08/2025	SDI PRESENCE LLC	Services through October 31, 2025 software- {PO:1034}	5,104.31
12/08/2025	SDI PRESENCE LLC	Services through October 31, 2025 software- {PO:1034}	831.60
12/08/2025	Southern California Edison (Non-Energy)	October 2025 service fees	19,641.34
12/08/2025	The Energy Authority Inc. (CAISO and ENERGY)	CAISO period 11/14/25 - 11/18/25, 8/15/25 - 8/20/25	113,899.61
12/08/2025	WCF National Insurance Company	7th installment of OCPA Worker's Compensation policy	620.86
12/08/2025	We Mail For You Inc.	Promotional Items {PO:1049}	2,365.43
12/08/2025	We Mail For You Inc.	CEA Outreach Supplies - {po: 1048}	32.33
12/08/2025	We Mail For You Inc.	Promotional Items {PO:1049}	4,795.48
12/08/2025	We Mail For You Inc.	100 CARE/FERA flyers in 6 language versions	574.88
12/10/2025	Optimization Solutions, LLC	Commission fees based on net benefits from the RA optimization	132,194.00
12/10/2025	We Konnect, Inc.	Brivo and Eagle Eye Cloud Services {po:1037}	243.00
12/11/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	173.98
12/11/2025	Lincoln Financial Group	12/11/25 Retirement debit 401A	24,730.30
12/11/2025	Lincoln Financial Group	12/11/25 Retirement debit 457B	11,126.02
12/12/2025	Travel Bank	Remote Employee Onboarding Training, December 2025 Board Meeting, and All Staff Holiday	777.01
12/12/2025	Travel Bank	Remote Employee October 2025 Board Meeting and OCPA Day of Service	622.93
12/12/2025	Travel Bank	Mileage - CEA Travels	136.29
12/12/2025	US Bank Interest and Service Charges	November 2025 Analysis service charge	4,175.20
12/15/2025	California ISO (Settlement Invoices) CAISO	CAISO CRR period for 11/19/25 - 11/25/25, 12/01/24 - 12/31/24, 2/01/24 - 2/29/24, 8/21/25 - 8/27/25 & 4/1/23 - 4/30/23	52,868.55
12/15/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	1,988.17
12/15/2025	The Energy Authority Inc. (CAISO and ENERGY)	CAISO period 11/19/25 - 11/25/25, 8/21/25-8/27/25, 12/1/24-12/31/24 & 2/1/24 - 2/29/24	29,828.64
12/16/2025	AM Conservation Group Inc	Oct 2025 Marketplace Management Fees {po: 1057}	327.55
12/16/2025	CITY OF BUENA PARK - UUT	November 2025 Utility User Tax	71,609.37
12/16/2025	CITY OF HUNTINGON BEACH - UUT	November 2025 Utility User Tax	784.42
12/16/2025	CITY OF IRVINE - UUT	November 2025 Utility User Tax	87,028.72
12/16/2025	Dell Marketing L.P.	Laptops and Small IT Equipment	4,037.40
12/16/2025	Dragon Kim Foundation	Gold Tournament Sponsorship	1,500.00
12/16/2025	Lakeview Business Center LLC	HVAC and metered electric usage	1,564.98
12/16/2025	Orange County Hispanic Chamber of Commerce	Supporting Sponsor: 2025 Estrella Awards	2,400.00
12/16/2025	Orange County Printing Company	Smart Letter Mailing- {po: 1048}	680.95
12/16/2025	SORREN CPAS, P.C. Inc.	June 30, 2025 financial statement audit. {PO:1046}	4,256.00
12/16/2025	The Irvine Co/Lakeview III	January 2026 - Monthly rent	20,367.40
12/16/2025	We Mail For You Inc.	75 Trifold Brochure	176.63
12/17/2025	Orange County Hispanic Chamber of Commerce	Annual membership for OCHCC	1,500.00
12/17/2025	The DOT Printer, Inc.	Promotional Items - {PO:1049}	543.33
12/17/2025	The DOT Printer, Inc.	Promotional Items - {PO:1049}	5,409.05
12/17/2025	The DOT Printer, Inc.	Promotional Items - {PO:1049}	2,542.90
12/17/2025	The Energy Coalition	OCPA Customer Programs through October 31, 2025 - {PO:1041}	32,277.16
12/18/2025	The DOT Printer, Inc.	Promotional Items - {PO:1049}	2,262.75
12/18/2025	US Bank Credit Card *7799	Office Supplies	28.96
12/18/2025	US Bank Credit Card *7799	Office Supplies	7.67
12/18/2025	US Bank Credit Card *7799	CEA Outreach Supplies - {po: 1048}	522.39
12/18/2025	US Bank Credit Card *7799	Promotional Items	875.35
12/18/2025	US Bank Credit Card *7799	OC REGISTER SUBS - Monthly subscription fee	14.00
12/18/2025	US Bank Credit Card *7799	Hotel Accommodations - Monthly CAC Meeting	193.63
12/18/2025	US Bank Credit Card *7799	Event Ticket - WRISE	15.00
12/18/2025	US Bank Credit Card *7799	Business lunch with Board Member	61.80
12/18/2025	US Bank Credit Card *7799	Business Lunch with Director Jung & Mr. Kim	47.52
12/18/2025	US Bank Credit Card *7799	Welcome New Staff Lunch with Director of Power Resources	56.02
12/18/2025	US Bank Credit Card *7799	Coffee meeting with Girish Balachandran	12.29
12/18/2025	US Bank Credit Card *7799	Hotel Accommodations - Board Meeting	111.73
12/18/2025	US Bank Credit Card *7799	Hotel Accommodations - Board Meeting	111.73
12/18/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - Board Meeting	15.98
12/18/2025	US Bank Credit Card *7799	Hotel Accommodations - Board Meeting	111.73
12/18/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - Board Meeting	78.93
12/18/2025	US Bank Credit Card *7799	Airfare - Board Meeting	308.57
12/18/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - Board Meeting	99.48
12/18/2025	US Bank Credit Card *7799	Hotel Accommodations - Board Meeting	258.30
12/18/2025	US Bank Credit Card *7799	Hotel Accommodations - Board Meeting	242.93
12/18/2025	US Bank Credit Card *7799	Transportation Expense - Ride Share or Mass Transit - Board Meeting	84.96
12/18/2025	US Bank Credit Card *7799	Hotel Accommodations - Board Meeting	116.85
12/18/2025	US Bank Credit Card *7799	Airfare - Board Meeting	235.98
12/18/2025	US Bank Credit Card *7799	HR Recruitment - Executive Assistant/Board Clerk	106.00
12/18/2025	US Bank Credit Card *7799	Parking Fee - Team Building Day	14.00
12/18/2025	US Bank Credit Card *7799	Irvine Lanes Team Building Day	346.00
12/18/2025	US Bank Credit Card *7799	Business Breakfast Team Building Day	49.55
12/18/2025	US Bank Credit Card *7799	Business Lunch Team Building Day	590.33
12/18/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	22.99
12/18/2025	US Bank Credit Card *7799	GOTOCOM Monthly Subscription	136.49
12/18/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	29.17
12/18/2025	US Bank Credit Card *7799	Business Meal - November 2025 Board Meeting	112.35
12/18/2025	US Bank Credit Card *7799	Office Supplies	31.24
12/18/2025	US Bank Credit Card *7799	Postage Service	10.48
12/18/2025	US Bank Credit Card *7799	Noise Reduction Office Improvement	1,206.73
12/18/2025	US Bank Credit Card *7799	Refund	(24.77)
12/18/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	9.28
12/18/2025	US Bank Credit Card *7799	IT Equipment	792.88
12/18/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	159.07

12/18/2025	US Bank Credit Card *7799	Office Supplies	77.55
12/18/2025	US Bank Credit Card *7799	Employee Required Training - Workforce Harassment	54.00
12/18/2025	US Bank Credit Card *7799	Building Maintenance	671.00
12/18/2025	US Bank Credit Card *7799	Staff Recognition Monthly Birthday Cake (2)	68.31
12/18/2025	US Bank Credit Card *7799	Business Lunch - Board Member and OCPA Staff	44.13
12/18/2025	US Bank Credit Card *7799	Office Supplies	34.47
12/18/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	9.60
12/18/2025	US Bank Credit Card *7799	Office Supplies	41.99
12/18/2025	US Bank Credit Card *7799	Amazon Monthly Subscription Fee	16.15
12/18/2025	US Bank Credit Card *7799	Office Supplies	43.95
12/18/2025	US Bank Credit Card *7799	Office Supplies	20.68
12/18/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	46.22
12/18/2025	US Bank Credit Card *7799	Office Supplies	129.25
12/18/2025	US Bank Credit Card *7799	Google Monthly Subscription	14.00
12/18/2025	US Bank Credit Card *7799	Employee Required Training - Workforce Harassment	27.00
12/18/2025	US Bank Credit Card *7799	Business Meal - All Staff Monthly Meeting	87.27
12/18/2025	US Bank Credit Card *7799	Kitchen and Pantry Items	14.46
12/18/2025	US Bank Credit Card *7799	Refund	(8.61)
12/18/2025	US Bank Credit Card *7799	Zoom Subscription Service	346.90
12/18/2025	US Bank Credit Card *7799	Airfare - CalCCA Lobby Days	376.97
12/19/2025	Golden Communications Inc	Monthly Managed Web Services, and Additional Labor - November 2025 -- (po: 1032)	1,399.00
12/19/2025	Just One Call Cleaning Services LLC	November 2025 cleaning services (PO: 1045)	1,300.00
12/19/2025	Pacific Energy Advisors Inc.	November 2025 - Monthly Services (po: 1043)	49,000.00
12/19/2025	Paychex	Flexperks	1,021.07
12/19/2025	Travel Bank	Mileage - Administrative Duties	21.42
12/19/2025	Travel Bank	Mileage - Administrative Duties	37.56
12/19/2025	Travel Bank	Mileage - CEA Travels	110.32
12/19/2025	Travel Bank	Remote Employee December 2025 Board Meeting, All Staff Holiday	891.54
12/19/2025	Travel Bank	Remote Employee Onboarding Training, December 2025 Board Meeting, and All Staff Holiday	2,447.01
12/22/2025	California ISO (Settlement Invoices) CAISO	CAISO CRR period for 11/1/25 - 11/30/25, 11/1/23 - 11/30/23, 9/1/25 - 9/4/25, 8/1/25 - 8/31/25 & 12/1/25 - 12/4/25	9,017.69
12/22/2025	High Desert Power Project LLC	November 2025 Capacity	625,000.00
12/22/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	184.14
12/22/2025	Marsh Landing, LLC	November 2025 Capacity Purchases	694,137.50
12/22/2025	Southern California Edison	June 2025 VA Sales	4,723,283.24
12/22/2025	Southern California Edison	November 2025 capacity purchases	467,344.90
12/22/2025	Southern California Edison	July 2025 VA Sales & Jan through June 2025 VAMO price adjustment	1,499,365.30
12/22/2025	The Energy Authority Inc. (CAISO and ENERGY)	CAISO period 11/26/25 - 12/4/25 & 8/28/25 - 9/4/25	76,993.27
12/23/2025	AM Conservation Group Inc	Sept 2025 monthly Management fees and Annual management fees	40,849.58
12/23/2025	AM Conservation Group Inc	Oct 2025 Marketplace activity - 6 thermostats- (po: 1057)	492.00
12/23/2025	Calpine Energy Services L.P.	November 2025 Capacity	59,750.00
12/23/2025	Constellation Energy Generation, LLC	October energy purchases	3,462,508.42
12/23/2025	Igoe (Med-iBank)	Medical and/or Dependent Care FSA Monthly Participation Fee	100.00
12/23/2025	Lincoln Financial Group	12/23/25 Retirement debit 457B	10,991.95
12/23/2025	Lincoln Financial Group	12/23/25 Retirement debit 401A	29,389.32
12/23/2025	Littler Mendelson, PC	November 2025 legal services -- (po:1016)	1,375.00
12/23/2025	Maher Accountancy	December 2025 - Treasurer and Accounting Services- (PO:1044)	22,000.00
12/23/2025	Maher Accountancy	November 2025 - Bill.com pass-through fees- (PO:1044)	199.48
12/23/2025	McCowin Water inc.	Monthly Lease Payment	79.00
12/23/2025	Morgan Stanley Capital Group	November 2025 energy purchases	2,015,522.82
12/23/2025	NRG BUSINESS MARKETING LLC	November 2025 energy purchases	1,891,719.03
12/23/2025	Orange County Printing Company	Smart Letter Mailing- (po: 1048)	646.52
12/23/2025	Reveille Inc.	November 2025 OCPA FY Marketing and PR Budget- (po: 1025)	50,042.25
12/23/2025	SDRMA	January 2026 employee benefit charges	17,037.02
12/23/2025	Sunrise Power Company LLC	November 2025 capacity purchase	1,556,250.00
12/23/2025	The Energy Authority Inc. (Service Fees)	November 2025 Resource Management Monthly Fees (PO:1011)	15,585.65
12/23/2025	Transalta Energy Marketing Us Inc.	November 2025 Energy Purchases	2,830,346.79
12/23/2025	Tullett Prebon Americas Corp.	Broker Fees - California Choice Energy Authority - November 2025	12,000.00
12/23/2025	US Bank TMI Trust	Disbursement charges from the lockbox account ###3400 for the period 11/1/24-10/31/25	3,150.00
12/26/2025	Travel Bank	Mileage - CEA Travels	19.11
12/26/2025	Travel Bank	Mileage - CEA Travels	212.66
12/26/2025	Travel Bank	Mileage - CEA Travels	105.56
12/26/2025	Travel Bank	Mileage - Administrative Duties	38.47
12/26/2025	Travel Bank	Mileage - CEA Travels	417.15
12/26/2025	Travel Bank	Remote Employee NextEra Energy Resources 3-Day Conference	676.70
12/30/2025	California Community Choice Association	Advance Expense Reimbursement	12,711.51
12/30/2025	Energy Development & Construction Corporation	October 2025 - RECs purchases	23,238.00
12/30/2025	The Energy Authority Inc. (CAISO and ENERGY)	CAISO period 12/05/25 - 12/11/25 9/05/25 - 9/11/25	191,523.69
12/31/2025	Calpine Energy Solutions	November 2025 services (po:1003)	198,345.60
		SUBTOTAL	80,236,656.40

10/3/2025		September 16 - 30 -Salaries, Wages, Fringe Benefits	108,786.93
10/3/2025		September 16 - 30 -Payroll Taxes	35,092.81
10/3/2025		September 16 - 30 -Paychex Service Fee	336.5
10/20/2025		October 1 - 15 -Salaries, Wages, Fringe Benefits	99,622.36
10/20/2025		October 1 - 15 -Payroll Taxes	27,017.84
10/20/2025		October 1 - 15 -Paychex Service Fee	640.25
11/5/2025		October 16 - 31 -Salaries, Wages, Fringe Benefits	115,216.67
11/5/2025		October 16 - 31 -Payroll Taxes	35,462.73
11/5/2025		October 16 - 31 -Paychex Service Fee	345.5
11/20/2025		November 1 - 15 -Salaries, Wages, Fringe Benefits	114,665.37
11/20/2025		November 1 - 15 -Payroll Taxes	34,758.24
11/20/2025		November 1 - 15 -Paychex Service Fee	668.75
12/4/2025		November 16 - 30 -Salaries, Wages, Fringe Benefits	104,487.19
12/4/2025		November 16 - 30 -Payroll Taxes	31,447.10
12/4/2025		November 16 - 30 -Paychex Service Fee	251.5

12/19/2025
12/19/2025
12/19/2025

December 1 - 15 -Salaries, Wages, Fringe Benefits
December 1 - 15 -Payroll Taxes
December 1 - 15 -Paychex Service Fee

127,238.45
42,175.14
709.75
SUBTOTAL 878,923.08

ORANGE COUNTY POWER AUTHORITY
Staff Report – Item 7.7

To: Orange County Power Authority Board of Directors

From: Joe Mosca, Chief Executive Officer

Subject: APPROVE BOARD OF DIRECTORS COMPENSATION/REIMBURSEMENT
POLICY UPDATE

Date: March 9, 2026

RECOMMENDATIONS

Approve amendments to Policy No. 5, Board of Directors and Community Advisory Committee Members Compensation and Expense Reimbursement Policy, to clarify that Board reimbursement may include mileage to and from Board meetings, committee meetings, and other compensable activities, and to simplify language relating to the amount of Board compensation.

BACKGROUND

Section 3.8 of OCPA’s Joint Powers Agreement provides that the OCPA Board of Directors shall adopt policies for compensation and reimbursement to Directors for attendance at meetings or other service on behalf of OCPA. On February 9, 2021, the Board of Directors adopted Policy No. 5, which governs the compensation and reimbursement of expenses for members of the Authority’s Board of Directors. Policy No. 5 was last revised on June 21, 2024.

The proposed amendments to Policy No. 5 clarify that traveling to and from activities or events, including but not limited to travel to and from meetings of the Board of Directors or Board committees, is eligible for reimbursement under Policy No. 5.

The revised version of the policy also simplifies the language relating to Board compensation. Under Section 3.8 of OCPA’s Joint Powers Agreement, the Board’s compensation may not be less than the amounts received by the Orange County Sanitation District (OCSAN) Board of Directors. The prior version of the policy referenced the outdated 2024 amount paid by OCSAN and OCPA, which since automatically increased in 2025 and 2026 in compliance with OCSAN’s ordinance and OCPA’s policy.

FISCAL IMPACT

There are no fiscal impacts.

ATTACHMENTS

Attachment A – Proposed Amendments to Policy No. 5, Board of Directors’ Compensation and Expense Reimbursement Policy

ORANGE COUNTY POWER AUTHORITY
Policy Number 005: Board of Directors and Community
Advisory Committee Members' Compensation and Expense
Reimbursement Policy

Approved: 11/20/2023 | Revised: 06/21/2024
Revised: 03/09/2026

This Policy governs compensation and reimbursement of expenses for members of the Authority's Board of Directors and Community Advisory Committee (Committee Members). The Policy applies to both regular members of the Board and alternate members, as well as Committee Members as specified herein.

DIRECTORS' COMPENSATION

Pursuant to this Policy adopted by the Board of Directors, the Authority is authorized to compensate Board members in the amount ~~of \$300~~described below for (1) attending each meeting of the Board of Directors, and (2) otherwise providing a day of service to the Authority. Pursuant to Section 3.8 of the Authority's Joint Powers Agreement, the Authority's ~~compensation to~~ Board members shall receive the then-current not be less than the amount provided to directors of the Orange County Sanitation District (OCSD). In compliance with OCSD's current ordinance relating to OCSD director compensation, on January 1 of each year, beginning with January 1, 2025, the amount of compensation for attending each meeting of the Board of Directors or otherwise providing a day of service to the Authority shall increase automatically by five percent (5%) unless said increase is waived by the OCSD board of directors or OCSD's ordinance is repealed or amended to eliminate such automatic increases. The Policy limits compensation to a specified maximum number of days per month. The Board of Directors may, from time to time, amend the Policy to change the amount of compensation and/or the maximum number of compensable days per month.

The following activities are compensable.

Compensable Activities

1. Meetings
Each regular Director shall be entitled to compensation for attendance at (1) each meeting of the Board of Directors; (2) each meeting of a standing committee on which the Director serves; (3) each meeting of an ad hoc committee to which the Director has been duly appointed; (4) each meeting of any joint governmental board, committee, or association to which the Director has been appointed as the Authority's representative; and (5) attendance at California Community Choice Association (CalCCA) annual conferences. Each alternate Director shall be entitled to compensation for attendance at a meeting when, and only when, the alternate Director attends the meeting in place of the regular Director.
2. Required Training
Each Director shall be entitled to compensation for attendance at the ethics training required by Government Code Section 53235 and the sexual harassment training and education required by Government Code Section 12950.1.
3. Other Activities
The Chair of the Board of Directors and Chief Executive Officer may, on a case-by-case basis, authorize compensation of individual Directors for a day of service when participating in the following types of activities: (1) meetings with representatives of local, regional, state, or national government on issues affecting the Authority; (2) meetings, conferences, and

seminars relating to the business and operation of community choice aggregation entities, (3) ceremonial events sponsored by the Authority; (4) ceremonial events sponsored by another organization; (5) meetings of agencies, nonprofit organizations, or service clubs where the Director makes a presentation on behalf of the Authority; and (6) meetings with Authority staff, including telephone conferences when physical attendance is impractical.

4. Considerations

The Board Chair and the Chief Executive Officer shall approve compensation under Section 3 above only for activities that provides a benefit to the Authority. Benefits include, but are not necessarily limited to, the acquisition of information, education, training, and skills that will further the Authority's mission and purpose. Other benefits include positive changes to federal and state statutes and regulations that govern the Authority, and maintenance of positive relations with the public and other governmental agencies.

Limitation

In no event shall a Director receive compensation for more than one meeting or other activity on the same day. Directors may not be compensated for more than six meetings per month.

Non-Compensable Activities

Notwithstanding the section above, Board members shall not receive compensation for the following activities: (1) attendance at meetings or events of nonprofit organizations or service clubs, except when the Board Chair and Chief Executive Officer have authorized the Director to make a presentation on behalf of the Authority as described above; (2) Authority sponsored employee events including, but not limited to, the annual employee holiday luncheon and retirement events; (3) parades, festivals, holiday events, or retirement dinners; (4) meetings, without Authority staff present, with existing or potential contractors, vendors, or consultants; (5) meetings of partisan political organizations; (6) meetings, tours, and similar events conducted at the request of the Board member; or (7) any activity not described above.

COMMUNITY ADVISORY COMMITTEE MEMBERS COMPENSATION

Community Advisory Committee members shall be compensated in the amount of \$50 for attending each meeting of the Community Advisory Committee, limited to one (1) meeting per month.

REIMBURSEMENT OF DIRECTORS' AND COMMITTEE MEMBERS' EXPENSES

Approved Activities

In accordance with the terms of this Policy, the Authority will reimburse Directors for certain expenses incurred in connection with the compensable activities described above in Directors Compensation, including without limitation attendance at Board or committee meetings; provided, however, that alternate Directors shall be authorized to attend CalCCA conferences and shall be eligible for reimbursement of associated expenses as set forth below, whether or not the alternate Director is attending the conference in place of the regular Director. The Authority will not reimburse Directors for any other expenses.

In accordance with the terms of this Policy, the Authority will reimburse Committee Members for certain expenses set forth below incurred solely in connection with their attendance at CalCCA annual conferences. The number of Committee Members eligible to attend a CalCCA annual conference and receive reimbursement under this Policy shall be determined prior to each CalCCA annual conference by the Chief Executive Officer, in consultation with the Board Chair. To be eligible to receive reimbursement for expenses incurred in connection with attendance at a CalCCA

annual conference, the Committee Member must successfully complete ethics training required by Government Code Section 53235 and the sexual harassment prevention training and education required by Government Code Section 53237.1. The Authority will not compensate or otherwise reimburse any expenses of Committee Members.

Reimbursable Expenses

1. Transportation

In travelling to and from activities or events, Directors and Committee Members must use the most economical form of transportation that is reasonably consistent with the Director's or Committee Member's travel and scheduling requirements.

2. Mileage for Personal Vehicles

a. The Authority will reimburse Directors and Committee Members for use of personal vehicles based on actual miles traveled at the then-current "standard mileage rate" adopted by the U.S. Internal Revenue Service for use in deducting the cost of operating an automobile for business purposes. The Authority will not reimburse Directors or Committee Members for any other personal vehicle expenses.

b. When calculating mileage traveled by a Director or Committee Member to attend an activity or event, the Authority will use the lesser of (1) the distance from the administrative headquarters of the Director's or Committee Member's appointing member agency to the event, and (2) the actual distance traveled. Mileage reimbursements shall not exceed the cost of the lowest available airfare.

3. Other Transportation Expenses

a. When travel by personal vehicle is impractical, the Authority will reimburse Directors and Committee Members for the actual cost of (1) regularly-scheduled travel by airplane, train, bus, or other commercial carrier, (2) rental cars, and (3) taxis and other comparably-priced for-hire vehicles. The Authority will also reimburse Directors and Committee Members for related necessary travel expenses such as baggage fees, toll charges, and parking fees. Directors and Committee Members must take advantage of any government or group rates offered by a transportation provider.

b. Before deciding to travel by air, each Director and Committee Member must consider the total cost of alternatives, including the cost of ground transportation and any necessary lodging. Each Director and Committee Member should also consider alternative departure times, departure and arrival airports, dates, departure times, and stopovers to minimize airfare. Directors and Committee Members should request travel arrangements as early as possible to take advantage of lower airfares.

c. Generally, the Authority will reimburse Directors and Committee Members only for air travel in coach class. When necessary based on a Director's or Committee Members' physical needs and/or the need to conduct meaningful work during a flight, the Board Chair has the discretion to approve reimbursement of first-class air travel. For trips that will exceed 24 hours, Directors and Committee Members must use their personal cars to travel to and from the airport, and utilize long-term airport parking, rather than pay for a taxi or other transportation to and from the airport.

4. Lodging

a. The Authority will reimburse Directors and Committee Members for actual and

necessary lodging expenses incurred in attending a conference, seminar, or meeting (for Committee Members, attendance is limited to annual CalCCA conferences). Directors and Committee Members must take advantage of any government rate or group rate for lodging whenever possible. If there is no government or group rate, the Authority will reimburse Directors and Committee Members for lodging up to the per diem rate used by the U.S. Internal Revenue Service as the maximum allowable deduction for business-related lodging expenses. The per diem rates are set by the General Service Administration (“GSA”) for federal employees. The rates are set forth at <https://www.gsa.gov/travel/plan-book/per-diem-rates>.

- b. Lodging in connection with an activity that lasts only one day is considered “necessary” when the travel time to and from the activity exceeds two hours.

5. Meals

The Authority will reimburse Directors and Committee Members for actual and necessary dining expenses incurred while attending (1) a conference, seminar, or meeting outside of the Authority, or (2) an Authority-related business meeting within the Authority. The Authority will reimburse Directors and Committee Members up to the applicable daily total GSA per diem rate for meals as set forth at <https://www.gsa.gov/travel/plan-book/per-diem-rates>. Reasonable tipping up to 20% of the meal is acceptable.

6. Incidentals

The Authority will reimburse Directors and Committee Members for actual and necessary incidental expenses incurred while attending a conference, seminar, or meeting outside the Authority, up to the applicable GSA per diem rate set forth at <https://www.gsa.gov/travel/plan-book/per-diem-rates>. Reimbursable expenses include tips given to drivers, porters, bellhops, baggage carriers, and hotel housekeepers.

7. Travel Arrangements

Each Director and Committee Member must utilize Authority staff to arrange all travel, lodging, and event registrations. The Chief Executive Officer shall designate an Authority employee responsible for making these arrangements. The Chief Executive Officer shall designate a single travel agency for use in making all travel arrangements.

Expenses That Are Not Reimbursable

The Authority will not reimburse Directors or Committee Members for the costs of: (1) barber and/or beauty shop services; (2) fines for traffic or parking violations; (3) any person accompanying a Director or Committee Member on a Authority-approved trip or event; (4) personal telephone calls; (5) fitness/health facility use; (6) massages; (7) alcoholic beverages; (8) entertainment (movies, sporting events, etc.); or (9) vehicle expenses other than the standard mileage charge.

Reimbursement Procedure

Each Director or Committee Member seeking reimbursement must file with the Secretary of the Board an expense report no later than three weeks after the conclusion of the compensable or reimbursable activity. The report shall attach detailed, actual receipts for all expenses. The report shall document that each expense meets the requirements for reimbursement set forth in this Policy. Without limiting the foregoing, each report shall identify the compensable activity and the date, nature, and purpose of each expense for which reimbursement is sought. For reimbursement of a personal vehicle expense at the standard mileage rate, the expense report shall identify the date of the travel, the actual miles traveled, and the business purpose of the travel. The Chief Executive Officer shall prepare a standard form of expense report for use by Directors and Committee Members

in seeking reimbursement.

Board Reports

Each Director and Committee Member seeking reimbursement of expenses incurred in connection with an activity shall provide a brief report of the activity at the next regular meeting of the Board of Directors or Community Advisory Committee, as applicable.

Other Expenses

Any expense that does not meet the requirements of this Policy may be reimbursed only if the Board of Directors approves the expense at a public meeting before the expense is incurred.

PENALTIES

Any Director or Committee Member that misuses public resources or falsifies an expense report required by this Policy is subject to the following penalties: (1) loss of reimbursement privileges; (2) restitution of the Authority; (3) civil penalties for misuse of public resources pursuant to Government Code Section 8314; and/or (4) prosecution for misuse of public resources pursuant to Penal Code Section 424.

ORANGE COUNTY POWER AUTHORITY
Staff Report – Item 7.8

To: Orange County Power Authority Board of Directors

From: Nicholaus Norvell, Interim General Counsel

Approved by: Joe Mosca, Chief Executive Officer

Subject: PUBLIC RECORDS ACT REPORT

Date: March 5, 2026

STRATEGIC GOALS

- Enrich & Grow the OCPA Community: _____
- Prioritize Fiscal Sustainability & Affordability: _____
- Design & Deploy Community-Aligned Customer Programs: _____
- Energize Our Community with Renewable Energy: _____
- Raise Awareness of Community Energy & Advocate for Our Customers: _____
- Not Applicable: _____

RECOMMENDED ACTION(S)

Receive and file.

BACKGROUND

As part of its February 2023 report, the State Auditor recommended that OCPA report to the Board of Directors no less than quarterly on: (1) the number of public records requests received, closed, and pending; (2) the average time OCPA took to respond to those requests; and (3) the reasons for withholding or redacting requested records, if applicable.

Below is a report covering the period from December 3, 2025, through March 5, 2026.

Requests Received	14
Requests Closed	8
Requests Pending (Including Ongoing Requests from Previous Reporting Period)	7

<p>Determination or Extension Letters Provided within 10 Days</p>	<p>Yes</p>
<p>Average Calendar Days to Fully Complete Closed Requests</p>	<p>28</p>
<p>Public Records Act Exemptions Applied <i>(Citations to Government Code unless otherwise noted)</i></p>	<ul style="list-style-type: none"> • Please be advised OCPA redacted the record to withhold confidential information as set forth in the California Public Utilities Commission Rulemaking 18-07-003, and Order Instituting Rulemaking 05-06-040, which are incorporated into the PRA by Government Code section 7927.705. In addition, a public disclosure of certain pricing rates and volumes could expose market sensitive information and put OCPA at an unfair competitive disadvantage which would negatively impact OCPA utility customers. Also, public disclosure of federal tax identification numbers and partial bank account numbers could compromise the financial security of the business or organization to which the financial information belongs. For these reasons, the public interest served in withholding the redacted information clearly outweighs the public interest served in disclosure pursuant to Government Code section 7922.000.

ATTACHMENT(S)

None.

**ORANGE COUNTY POWER AUTHORITY
Staff Report – Item 8.1**

To: Orange County Power Authority Board of Directors

From: Tiffany Law, Chief Financial Officer

Approved By: Joe Mosca, Chief Executive Officer

Subject: APPROVE FISCAL YEAR 2025-26 MID-YEAR BUDGET AMENDMENT

Date: March 9, 2026

STRATEGIC GOALS

- Enrich & Grow the OCPA Community: _____
- Prioritize Fiscal Sustainability & Affordability: Ensure affordable rates for OCPA customers while covering all expenses and advancing equitable renewable energy initiatives.
- Design & Deploy Community-Aligned Customer Programs: _____
- Energize Our Community with Renewable Energy: _____
- Raise Awareness of Community Energy & Advocate for Our Customers: _____
- Not Applicable: _____

RECOMMENDED ACTION

Approve Fiscal Year 2025-26 Mid-Year Operating Budget Amendment, as proposed in Attachment 1.

BACKGROUND

On June 9, 2025, the Board approved the FY 2025-26 Operating Budget, marking the third full year of OCPA operations. The approved budget was balanced and projected approximately \$286 million in total net revenues and \$285.6 million in total expenditures, resulting in a modest net surplus of \$450,000.

Since budget approval, several developments have materially affected OCPA’s revenue and cost outlook, requiring a mid-year update to align the Operating Budget with Board policy and current market conditions. On January 12, 2026, the Board approved OCPA’s 2026 rate design, maintaining the October 2025 generation rates through calendar year 2026 to provide predictability for customers during a period of heightened market volatility. Consistent with that Board direction, the mid-year amendment updates revenue projections to reflect the approved rates and incorporates updated power supply forecasts that reflect the most current cost mitigation assumptions.

In parallel, staff implemented disciplined non-energy spending controls to preserve financial strength, maintain essential operations, and support prudent operating reserves. The amendment also refines key assumptions to reflect confirmed investment income, utility service fees, and contracted services, including out-of-pocket technical consultancy costs associated with the green prepayment bonds initiative. These updates reflect routine budget stewardship and reinforce OCPA’s ability to manage market volatility while continuing to provide stable, affordable service to customers.

FY 2025-26 MID-YEAR OPERATING BUDGET OVERVIEW

The table below summarizes the approved revenue and expense budgets for FY 2025-26 compared to the proposed mid-year amendments.

(\$ in thousands)	Approved Budget FY 2025/26	% of Rev	Mid-Year Budget FY 2025/26	% of Rev	Change \$	Change %
Period Ending Jun 30						
REVENUE AND OTHER SOURCES						
Revenue - Electricity Base	246,322		242,389			
Revenue - Smart Choice Premium	7,430		7,525			
Revenue - 100% Renewable Premium	3,252		262			
Less: Uncollectible Accounts	(3,855)		(3,753)		(6,724)	(2.7%)
Revenue deferral	29,888		30,000		112	0.4%
Net Revenue - Electricity	283,037	99.0%	276,425	99.4%	(6,612)	(2.3%)
Investment and Miscellaneous Income	3,000	1.0%	1,535	0.6%	(1,465)	(48.8%)
Total Net Revenue and Other Sources	286,037	100.0%	277,960	100.0%	(8,077)	(2.8%)
EXPENDITURES AND OTHER USES						
CURRENT EXPENDITURES						
Cost of Energy	269,368	94.2%	267,287	96.2%	(2,082)	(0.8%)
Data Manager	2,237	0.8%	2,217	0.8%	(20)	(0.9%)
Utilities Service Fees	480	0.2%	399	0.1%	(81)	(17.0%)
Staffing Costs	6,212	2.2%	5,198	1.9%	(1,014)	(16.3%)
Contract Services	1,562	0.5%	1,808	0.7%	247	15.8%
Legal Services	756	0.3%	706	0.3%	(49)	(6.5%)
Marketing and Outreach	1,650	0.6%	1,546	0.6%	(104)	(6.3%)
Other G&A	1,787	0.6%	1,316	0.5%	(471)	(26.3%)
Energy Programs	1,221	0.4%	1,199	0.4%	(22)	(1.8%)
	285,272	99.7%	281,675	101.3%	(3,597)	(1.3%)
OTHER USES						
Capital Outlay	0	0.0%	0	0.0%	0	0.0%
Total Other Uses	0	0.0%	0	0.0%	0	0.0%
DEBT SERVICE						
Interest costs - nonoperating	314	0.1%	317	0.1%	2	0.8%
Finance costs - Principal	0	0.0%	0	0.0%	0	0.0%
Total Expenditures and Other Uses	285,587	99.8%	281,992	101.5%	(3,594)	(1.3%)
Net Income (Surplus/Deficit)	450	0.2%	(4,032)	(1.5%)	(4,483)	(995.3%)

FY 2025-26 MID-YEAR OPERATING BUDGET ANALYSIS

The FY 2025-26 Mid-Year Budget aligns revenue projections with the Board-approved 2026 rate design and incorporates updated power supply projections. The sections below summarize the mid-year budget adjustments and the key assumptions driving these updates.

Net Revenue – Electricity (-\$6.6 million)

OCPA's primary source of revenue is retail electricity sales. OCPA's generation rates are benchmarked to Southern California Edison (SCE) and adjusted for applicable surcharges, including the Power Charge Indifference Adjustment (PCIA). The FY 2025-26 Recommended Budget assumed a full year of service to approximately 24,000 commercial and 155,000 residential customer accounts across OCPA's member jurisdictions within SCE's service territory.

For the first half of the fiscal year (July – December 2025), net electricity revenue reflects the 2025 rate design¹ approved in January 2025, which set OCPA's base generation rates at a 3% discount to SCE's equivalent generation rates. While OCPA's base generation rates were set below SCE's equivalent generation rates, revenue in the first half of the year was lower than it would have been under SCE-equivalent pricing; the impact was partially offset by recognition of the \$30 million revenue deferral consistent with the approved financial plan.

For the second half of the fiscal year (January – June 2026), net electricity revenue reflects the Board-approved 2026 rate design adopted on January 12, 2026, which maintains the October 2025 OCPA generation rates and product differentials for Basic Choice, Smart Choice, and 100% Renewable Choice throughout calendar year 2026. This approach provides predictability and stability for customers during a period of heightened market volatility. Consistent with the Board's affordability direction, holding rates flat while the power supply cost environment² was higher than assumed at budget adoption reduces near-term operating margin and the net revenue available to recover power supply costs and support operating reserve levels (notwithstanding the mid-year cost mitigation measures reflected elsewhere in this report, including a \$2.1 million decrease in projected cost of energy versus the approved budget). Accordingly, net electricity revenue is projected to be \$6.6 million lower than the original budget as of June 30, 2026. This budget-to-budget variance reflects the Board-approved rate strategy and updated forecasting assumptions, not a reduction in OCPA's service footprint.

Investment and Miscellaneous Income (-\$1.5 million)

Projected investment and miscellaneous income for FY 2025-26 is generated from OCPA's diversified portfolio of interest-bearing assets, including FDIC-insured IntraFi Cash Services (ICS) money market accounts, negotiable certificates of deposit (CDs), and U.S. Treasury bills.

¹ **Basic Choice** offers a 3% discount compared to SCE's equivalent generation rates and includes 47% renewable energy content. **Smart Choice** is priced at 1.0 cent per kWh above Basic Choice rates and provides 55% renewable and 40% carbon-free energy in 2025, increasing to 60% renewable and 40% carbon-free energy in 2026. For customers seeking a fully renewable option, **100% Renewable Choice** is available at 1.5 cents per kWh above Basic Choice rates.

² For clarity, references to a higher "power supply cost environment" describe conditions relative to assumptions used at budget adoption; the mid-year cost of energy forecast reflects updated inputs and mitigation actions, resulting in a \$2.1 million decrease versus the approved budget.

This strategy is designed to maintain liquidity, comply with OCPA's Investment Policy, and achieve prudent, risk-adjusted returns.

Investment and miscellaneous income is projected to be \$1.5 million below the original budget, primarily due to (1) lower average investable cash balances than assumed at budget adoption, reflecting updated timing of cash needs for power supply and CAISO settlements, and (2) reinvestment yields that were modestly lower than assumed in the approved budget, and a reduced average invested principal balance during the fiscal year.

Cost of Energy (-\$2.1 million)

Total cost of energy includes system energy, renewable energy (including carbon-free attributes), California Independent System Operator (CAISO) fees, and Resource Adequacy (RA).

The projected \$2.1 million decrease in cost of energy is primarily driven by updated assumptions for the 2026 Renewables Portfolio Standard (RPS) Market Price Benchmark (MPB), which is used to calculate renewable energy (REC) costs under SCE's Voluntary Allocation Market Offer (VAMO). As part of OCPA's cost mitigation efforts, the mid-year budget updates the 2026 RPS MPB assumptions based on a blended price forecast using the most recent available forecasts from S&P Global and the CPUC. In addition, the CPUC's PCIA OIR may evaluate the MPB methodology and related market inputs; the mid-year budget reflects the most current available forecasts and observed market pricing trends for REC and RA.

Additional savings are supported by recent declines in REC market prices and revenues generated through portfolio optimization, including sales of surplus RA, carbon-free resources, and RECs, where available and economical.

Despite ongoing market volatility, OCPA remains financially resilient. Through proactive procurement, disciplined forecasting, strategic monetization of surplus resources, and continuous cost optimization, OCPA continues to provide reliable and affordable energy service to the communities it serves.

Non-Energy Operating Expenses

OCPA's non-energy operating expenses support essential business functions, including data management and utility service fees, staffing, contract services, legal services, marketing and outreach, general and administrative costs, and energy programs. To maintain financial stability and help mitigate rate impacts, OCPA has proactively identified efficiencies and implemented cost-saving measures while sustaining operational effectiveness. These reductions reflect deliberate prioritization of reliability, compliance, customer service, and member support functions, while scaling back or deferring discretionary spending where feasible.

The FY 2025-26 mid-year budget reflects an overall reduction of approximately \$1.5 million (9.5%) in non-energy operating expenses. The sections below summarize key expense areas and the associated budget adjustments.

Data Manager and Utility Service Fees (-\$102,000)

OCPA contracts with Calpine Community Energy (Calpine) for essential services such as billing data management and call center operations, with fees primarily determined by the number of customer meters served. In addition, SCE assesses utility service fees for meter reading, data processing, and bill coordination, as required and regulated by the California Public Utilities Commission (CPUC).

OCPA projects \$102,000 in savings by June 30, 2026, driven primarily by careful review and validation of SCE billings to identify and minimize billing errors, and true-ups to actual expenditures based on updated meter counts and confirmed service fee charges.

Staffing Costs (-\$1 million)

As part of OCPA's ongoing cost mitigation efforts, staffing adjustments have been implemented to support financial stability while maintaining operational effectiveness.

In June 2025, the Board approved a staffing plan of 29 full-time positions and two intern positions for FY 2025-26. Staffing costs include salaries, payroll taxes, benefits, cost-of-living adjustments (COLA), and stipends for Board and Community Advisory Committee (CAC) members.

To help offset rising operating costs and reduce near-term budget pressure, OCPA strategically adjusted the timing of filling vacant full-time positions, resulting in approximately \$1 million in savings. Essential operational, compliance, and customer-facing functions continue to be supported through existing staff capacity and targeted contract support where appropriate.

Total staffing costs are projected at approximately \$5.2 million by June 30, 2026, representing about 1.9% of total revenues.

Contract Services (+\$247,000)

OCPA follows industry best practices by using external consultants to supplement internal operations while building internal capacity over time for non-technical functions. This approach supports operational efficiency, cost-effectiveness, and long-term organizational resilience as OCPA transitions toward greater self-sufficiency.

Contract services provide specialized expertise and support across the following areas:

Energy Procurement and Portfolio Management

Includes short- and long-term energy procurement and contracting, power supply portfolio and risk management, load forecasting, integrated resource planning, scheduling coordination, Congestion Revenue Rights (CRR) transactions, and CAISO settlements and compliance reporting.

Financial and Administrative Services

Includes accounting and annual financial audits, rate strategy development, analysis of SCE General Rate Case (GRC) filings and Energy Resource Recovery Account (ERRA) forecasts, as well as IT support, cybersecurity services, human resources consulting, credit rating development, and banking services.

Green Prepayment Bonds

Includes fees for the green bond second-party opinion and credit rating agency assessments, totaling approximately \$345,000.

Through disciplined planning and cost controls, OCPA has largely maintained contract service expenditures in line with the original FY 2025-26 budget. The proposed mid-year increase is primarily driven by green prepayment bond-related fees that were not fully reflected at the time of budget approval and became known as the transaction advanced.

Legal Services (-\$49,000)

Legal services support OCPA's general counsel needs, power supply procurement, regulatory compliance, employment matters, governance, and legislative advocacy. To strengthen engagement in state-level policy, OCPA plans to retain a Sacramento-based lobbyist in Q1 2026.

OCPA projects \$49,000 in savings in the legal services budget by June 30, 2026, primarily due to lower-than-budgeted costs for labor counsel, clerk support, and advocacy-related services.

Marketing and Outreach (-\$104,000)

As a community-focused public agency, OCPA prioritizes meaningful engagement with customers to build trust, strengthen relationships, and advance its mission of delivering clean, affordable energy. Through a mix of communication channels and community presence, OCPA raises awareness of its services, educates residents and businesses about community choice energy, and promotes local sustainability initiatives.

Through strategic cost management and internal efficiencies, OCPA projects \$104,000 in savings in the Marketing and Outreach budget by June 30, 2026, while maintaining a strong commitment to community engagement.

Savings are primarily attributable to lower-than-budgeted spending in paid media, reduced costs under the marketing and communications consultancy contract, and lower translation services expenses during the fiscal year. These reductions reflect timing, campaign planning efficiencies, and careful vendor and scope management, while preserving OCPA's ability to maintain consistent communications and outreach.

Sponsorships, memberships, and promotional materials remain important tools for community presence and engagement. Accordingly, the projected savings are not driven by structural reductions in those ongoing line items, and OCPA expects these costs to remain necessary to support community engagement needs, including anticipated outreach to prospective members such as Fountain Valley.

General & Administrative (-\$471,000)

General and Administrative (G&A) expenses support core business operations, including office lease costs, IT equipment and software, business insurance, bank fees, office supplies, and industry membership dues (including California Community Choice Association, CalCCA, and California Community Choice Financing Authority, CCCFA). G&A also includes discretionary spending

such as conferences, professional development, travel, and business meals, all of which have been closely managed to control costs.

As of June 30, 2026, OCPA achieved \$471,000 in savings through targeted cost mitigation efforts, primarily by reducing discretionary expenses while maintaining essential business functions. Key savings were driven by lower travel and professional development spending, tighter controls on office-related purchases, and more cost-effective business meal practices. Additional reductions were achieved through a review of industry memberships and subscriptions to eliminate or defer non-essential items.

In the IT category, implementation of a new energy portfolio risk management system will be deferred. This system would enhance market intelligence, portfolio optimization, risk management, and regulatory compliance; however, the renewal of OCPA's existing power portfolio management service provider will provide comparable functionality within the existing scope of services and flat monthly fees, eliminating the need for a separate near-term investment.

OCPA Energy Programs Development Progress (Total FY 2025/26 Projected Spending: \$1.2 million)

OCPA is committed to reinvesting in its communities through energy programs that deliver direct customer benefits while advancing the transition to clean energy. Programs are designed to reflect the diverse needs of households and businesses across OCPA's member jurisdictions and to prioritize equity, affordability, and measurable outcomes.

A key milestone in this work is the launch of the Board-approved Community Power Plan (CPP), a strategic framework to identify local priorities and guide the development of future offerings. To support CPP implementation, OCPA invested in consulting and administrative support, including a comprehensive Community Needs Assessment and three additional evaluations focused on existing program performance, internal operational alignment, and potential future funding opportunities.

OCPA also continues to operate its Incentive Finder platform, which helps customers identify applicable local, state, and federal rebates and energy efficiency incentives tailored to their specific needs.

To support sustainable transportation, OCPA advanced development of an EV charging program for member cities and partnered with the Orange County Transportation Authority (OCTA) to offer e-bike safety training that promotes safe and low-emission transportation alternatives. In addition, OCPA's annual Bright Futures Grant provides funding to community organizations advancing clean energy and sustainability initiatives.

In Q3 2025, OCPA launched its first state-funded program, the Equitable Building Decarbonization Direct Install (EBD-DI) initiative, funded by the California Energy Commission (CEC). The program provides no-cost energy-efficient upgrades to low- and middle-income households in communities of concern. OCPA has been awarded \$771,000 to implement the program and anticipates receiving approximately \$33,800 in grant revenue by June 30, 2026, to

reimburse labor, fringe benefit, and travel costs associated with program development and outreach.

Other Uses and Non-Operating Expenses

Interest and Finance Costs (+\$2,000)

Interest expenses include approximately \$266,000 in accrued interest on the \$7.5 million loan from the City of Irvine and an imputed interest expense of approximately \$51,000 related to OCPA's office rental lease. The lease interest is calculated in accordance with Governmental Accounting Standards Board (GASB) 87 Leases accounting rules, which require the net present value of lease obligations to be capitalized and amortized over the lease term.

FISCAL IMPACT

In its third full year of operations, the proposed FY 2025-26 Mid-Year Operating Budget Amendment reflects OCPA's commitment to limiting customer rate impacts while navigating rising energy costs. The mid-year update balances affordability and financial stewardship, maintains operational stability, and demonstrates disciplined budget governance and proactive management of market volatility.

The amended budget projects approximately \$278 million in net revenues and \$282 million in total operating and non-operating expenses, resulting in an estimated \$4 million shortfall as of June 30, 2026. This near-term shortfall is expected to be mitigated by savings associated with the green prepayment bonds transaction by December 31, 2026. The June 30, 2026 timing shortfall is driven primarily by lower net electricity revenue associated with holding rates flat for predictability, and is partially offset by cost mitigation measures reflected in the mid-year forecast, including a \$2.1 million decrease in cost of energy versus the approved budget. Even with this budget pressure, OCPA maintains a positive operating reserve and sufficient liquidity to support power supply procurement, CAISO settlement obligations, and ongoing operations.

Based on the mid-year budget presentation in Attachment 1, the operating reserve is projected to be approximately \$41 million, or 14% of total budgeted operating expenditures, as of June 30, 2026. This estimate reflects the conservative budget basis used for the Operating Budget amendment. Consistent with the 2026 Rate Design financial forecast, OCPA's reserve outlook is projected to be approximately \$52 million, or 21%, by December 31, 2026, reflecting updated planning assumptions and timing differences between the operating budget presentation and the rate design pro forma forecast. Together, these views support the conclusion that OCPA remains financially stable while prioritizing customer affordability during market volatility.

Despite near-term budget pressure, OCPA remains financially resilient. Through prudent financial oversight, targeted cost mitigation, disciplined planning, and active portfolio management, OCPA continues to provide reliable and cost-effective energy service to the communities it serves while maintaining a focus on long-term sustainability.

ATTACHMENT

1. Proposed Fiscal Year 2025-26 Mid-Year Operating Budget Amendment

Proposed FY 2025/26 Mid-Year Operating Budget Amendment

(\$ in thousands)	Approved Budget		Mid-Year Budget			
Period Ending Jun 30	FY 2025/26	% of Rev	FY 2025/26	% of Rev	Change \$	Change %
REVENUE AND OTHER SOURCES						
Revenue - Electricity Base	246,322		242,389			
Revenue - Smart Choice Premium	7,430		7,525			
Revenue - 100% Renewable Premium	3,252		262			
Less: Uncollectible Accounts	(3,855)		(3,753)		(6,724)	(2.7%)
Revenue deferral	29,888		30,000		112	0.4%
Net Revenue - Electricity	283,037	99.0%	276,425	99.4%	(6,612)	(2.3%)
Investment and Miscellaneous Income	3,000	1.0%	1,535	0.6%	(1,465)	(48.8%)
Total Net Revenue and Other Sources	286,037	100.0%	277,960	100.0%	(8,077)	(2.8%)
EXPENDITURES AND OTHER USES						
CURRENT EXPENDITURES						
Cost of Energy	269,368	94.2%	267,287	96.2%	(2,082)	(0.8%)
Data Manager	2,237	0.8%	2,217	0.8%	(20)	(0.9%)
Utilities Service Fees	480	0.2%	399	0.1%	(81)	(17.0%)
Staffing Costs	6,212	2.2%	5,198	1.9%	(1,014)	(16.3%)
Contract Services	1,562	0.5%	1,808	0.7%	247	15.8%
Legal Services	756	0.3%	706	0.3%	(49)	(6.5%)
Marketing and Outreach	1,650	0.6%	1,546	0.6%	(104)	(6.3%)
Other G&A	1,787	0.6%	1,316	0.5%	(471)	(26.3%)
Energy Programs	1,221	0.4%	1,199	0.4%	(22)	(1.8%)
	285,272	99.7%	281,675	101.3%	(3,597)	(1.3%)
OTHER USES						
Capital Outlay	0	0.0%	0	0.0%	0	0.0%
Total Other Uses	0	0.0%	0	0.0%	0	0.0%
DEBT SERVICE						
Interest costs - nonoperating	314	0.1%	317	0.1%	2	0.8%
Finance costs - Principal	0	0.0%	0	0.0%	0	0.0%
Total Expenditures and Other Uses	285,587	99.8%	281,992	101.5%	(3,594)	(1.3%)
Net Income (Surplus/Deficit)	450	0.2%	(4,032)	(1.5%)	(4,483)	(995.3%)

ORANGE COUNTY POWER AUTHORITY
Staff Report – Item 8.2

To: Orange County Power Authority Board of Directors

From: Pranesh Venugopal, Energy Programs Manager
Jacquie Henderson, Director of Communications and External Affairs

Approved by: Joe Mosca, Chief Executive Officer

Subject: RENTER ENERGY EFFICIENCY PROGRAM

Date: March 09, 2026

STRATEGIC GOALS

- Enrich & Grow the OCPA Community:
- Prioritize Fiscal Sustainability & Affordability:
- Design & Deploy Community-Aligned Customer Programs:
- Energize Our Community with Renewable Energy:
- Raise Awareness of Community Energy & Advocate for Our Customers:
- Not Applicable:

RECOMMENDED ACTION(S)

Receive and file.

BACKGROUND

In February 2026, the Board adopted the Community Power Plan (CPP), which provides a strategic framework to develop and implement energy programs that address the specific needs of OCPA’s member communities. The full plan is available on the OCPA website at ocpower.org/community-power-plan for community review. It is divided into easy-to-find sections, including a survey dashboard that serves as an interactive tool allowing visitors to tailor survey data based on residential and commercial customers, identifying data, and demographics.

The CPP prioritized broad program categories based on five in-depth analyses, including community desire, ability to fill market gaps, opportunities for external funding support and cost-benefit considerations. Under the CPP framework, impact and feasibility scores were used to prioritize these program categories. Impact refers to the expected measurable benefits of a program, including improvements in customer affordability, energy use reduction, load shifting, impact on communities of concern, economic impact, air pollutant impact, incremental greenhouse gas impact, extreme heat mitigation, and electric reliability. Impact for each of these categories is

scored by different combinations of Community Input, Organization Needs (through surveys) and Existing Programs Assessment. Feasibility evaluates the practicality of implementation taking into consideration OCPA customer eligibility, uptake of existing programs, program redundancy, OCPA revenue impact, overall investment impact, and implementation timeline. Each of the feasibility categories is scored by different combinations of committee scoring, organization needs (through surveys) and existing programs assessment. Priority reflects the combined assessment of impact and feasibility, identifying program categories that meet demonstrated community needs while maintaining manageable development timelines and resource requirements.

The first program being launched out of the CPP was identified as a top priority and is feasible to launch in the current fiscal year, which has four months remaining. Called the Renter Energy Efficiency Program, it provides electrification and energy savings specifically for renters, a customer segment with minimal ability to make home energy improvements. The program not only advances the CPP but also advances OCPA's strategic goal to design and deploy community-aligned customer programs while prioritizing affordability, fiscal responsibility, and equitable access to clean energy solutions.

DISCUSSION AND ANALYSIS

As shared in the February Board of Director's meeting, a high priority program category identified for rapid implementation from the CPP is Direct-to-Renter Electrification and Demand Response. As a result, OCPA developed the Renter Energy Efficiency Program that is scheduled for launch in March 2026. It provides renters with plug-in equipment that supports energy efficiency, load shifting, and reliability while being designed to help renters overcome landlord approval barriers to making energy upgrades and improvements in their residence. The program also addresses a critical gap identified in the Community Power Plan's Existing Programs Assessment, which found that although a high percentage of residential programs are available to renters, structural barriers remain. Renters often cannot modify their homes, must obtain landlord approval for permanent equipment changes, and face split incentive challenges, where the property owners control capital investments while tenants bear utility costs. Meanwhile, many energy efficiency and electrification incentives are more accessible to homeowners. The Renter Energy Efficiency Program is designed specifically to bypass these barriers, improving indoor comfort and air quality while providing resources that support informed energy use and peak load management, helping renters better manage their energy costs.

Renter households represent a significant share of OCPA customers across member cities. Approximately 55 percent of households in Irvine, 48 percent in Fullerton, 43 percent in Buena Park, and 34 percent in Fountain Valley are renters. In addition, a sizeable portion of OCPA customers are enrolled in income-qualified programs including CARE, FERA, and Medical Baseline, with participation rates varying by city. These demographic factors further validate the importance of developing targeted renter-focused programs that address both affordability and access barriers within OCPA's service territory.

A portion of the Board-approved FY25/26 Programs budget is allocated to the first high priority program out of the Community Power Plan, and this will be used for the Renter Energy Efficiency Program. The total allocation of \$650,000 will provide approximately 170 customers with a set of two appliances at no-cost: a portable electric air conditioner with supplemental heating called a heat pump, and a portable battery. The portable heat pump Model: Midea MAP14HS1TBL is

designed for spaces approximately 300-550 square feet, will provide climate control through heating, cooling, ventilation, and dehumidification in one device. It is paired with a battery Model: EcoFlow Delta 3 Max to reduce operation during peak hours, typically between 4:00PM and 9:00PM, and mitigate the utility bill impact. The battery can offset an estimated two hours of peak usage by charging during lower-cost periods and discharging during peak hours. This method can also keep essential devices operable during a power outage or during an extreme heat event.

Market research indicates that upfront cost is the primary barrier preventing renters from purchasing high-efficiency room heat pumps. The program directly addresses this barrier by providing equipment, worth approximately \$1,500 per household, at no cost and incorporating a required educational video prior to application submission to ensure informed participation. The video outlines the benefits of the equipment, proper usage, and considerations to help determine whether the products are suitable for their home. Additionally, research indicates that many households using portable heaters or window air conditioners reduce or turn off central systems while operating room-based equipment. The program will validate this through pre- and post surveys. Electricity usage may increase for customers who currently have central air conditioning but do not use it, as well as for those who do not have any air conditioning. However, by pairing portable heat pumps with portable battery storage, the program also supports time-of-use energy management by enabling participants to charge the battery during lower-cost hours and use stored electricity during higher-cost peak periods.

To apply to the program, renters will submit an application through the OCPA website. The applications meeting eligibility criteria will be placed in an applicant pool. When the application period closes, applications will be selected from the pool through a lottery system with priority given to OCPA customers enrolled in the CARE, FERA, and Medical Baseline programs. Once selected, OCPA staff will notify the customer with additional information, including the estimated equipment delivery date. A waitlist will be created for the applicants not selected in this round of funding, and the waitlist will be utilized for future rounds of funding.

Program participants may elect to complete a survey before receiving their equipment to create a data baseline, and another survey after using the equipment to gauge program success. Survey participation will be incentivized with a \$25 gift card for each survey. The data gathered from the surveys will aid tracking the number of households served, the share of income-qualified participants, geographic distribution across OCPA's service territory, reported changes in equipment usage behavior, and participant-reported comfort outcomes. Where consent is provided, utility data will additionally be analyzed to assess potential peak-hour usage patterns and overall energy impacts. Findings from this initial phase will inform whether the program should be modified in future fiscal years.

The program includes safeguards to protect both OCPA and participants. Applicants must acknowledge the Terms and Conditions prior to selection. Any utility data analysis will occur only with explicit participant consent in the pre-survey and in accordance with privacy requirements. Upon delivery, ownership of the equipment transfers to the participant; however, the equipment may not be transferred or resold. In-home installation is not provided, as the devices are portable and plug-in, and manufacturer warranties apply in the event of equipment defects.

Outreach for the program will be implemented through a targeted, multi-channel approach designed to reach renters directly, with particular emphasis on CARE, FERA and Medical Baseline households. Prior to the application window opening in March, OCPA will conduct targeted outreach through interest forms at select community meetings, events, and renter-serving forums. Confirmed in-person and virtual outreach engagements include presentations or tabling at the Fullerton Collaborative, the Electrification 101 Workshop hosted by the City of Irvine, the Buena Park Collaborative, Buena Park Middle School Career Night, and the Buena Park Fit Committee (virtual sessions conducted both prior to and during the application window). Additional workshop or webinar opportunities are being explored with community partners like Give for a Smile. Direct customer communication will include a targeted mailer to FERA and Medical Baseline customers. Email outreach will be conducted to over 500 Energy Efficiency Kit recipients who opted-in to receive communications, as well as over 80 stakeholder organizations including city staff, nonprofit organizations, multicultural groups, elected officials, chambers of commerce, schools, universities, food distribution centers, and financial institutions. One additional goal is to get the program listed in third-party incentive and electrification platforms including The Switch Is On and Elephant Energy.

Program success will be measured by strong application demand, meaningful participation among income-qualified renters, evidence of recommended equipment usage, positive comfort outcomes, and demonstrated peak hour usage. Findings from this initial phase will inform whether the program should be refined, expanded, or integrated into future long-term electrification and load management strategies.

FISCAL IMPACT

The Renter Energy Efficiency program costs are within the FY2025/26 budget.

ATTACHMENTS

Attachment A – Renter Energy Efficiency Program Handbook

Orange County Power Authority (OCPA) Renter Energy Efficiency Program Handbook

Introduction

This handbook provides a step-by-step guide to help renters apply for and understand the Orange County Power Authority (OCPA) Renter Energy Efficiency Program.

Background

The OCPA Renter Energy Efficiency Program is designed to empower renter inclusion in energy efficiency, energy demand management, and electrification without needing landlord input. Offering a plug-in portable Heating, Ventilation, and Air Conditioning (HVAC) system paired with a portable battery enables renters to utilize smart scheduling and reduce their peak energy usage. Through this program, selected and eligible renters will receive both appliances free of cost.



Left Image: Portable Midea Duo HVAC system
Right Image: Portable EcoFlow battery system



The portable HVAC provides year-round climate control by offering heating, cooling, ventilation, and dehumidification in one device. Unlike traditional portable air conditioning units, the unit provided through the Renter Energy Efficiency Program is a heat pump that moves heat out of a room for cooling and pulls heat in for warming.

High-Level Process

Renters must complete a singular eligibility application to enter the applicant lottery for the chance to be selected. Once eligible applicants are selected, they will receive the portable HVAC system and battery at the address provided in their application.

What Makes a Good Candidate

You're a good candidate for this program if you:

- Are an active OCPA residential customer.
- Have access to a window for venting the portable HVAC unit.
- Have an outlet on a lightly loaded circuit (i.e., not shared with other high-power appliances) for the portable HVAC unit to reduce the risk of tripped breakers.
- Plan to operate the portable HVAC unit in a single room to reduce or eliminate use of your central A/C for some period of time

Eligibility Requirements

The applicant must meet the following requirements:

- Must be an OCPA residential customer.
- Must attest to renting their primary residence.
- Must acknowledge and agree to the program Terms and Conditions.

Applicants enrolled in Medical Baseline Allowance, California Alternate Rates for Energy (CARE), and Family Electric Rate Assistance (FERA) will receive priority consideration. However, all applicants will remain eligible for selection regardless of enrollment in the programs listed.

Eligibility Application Window

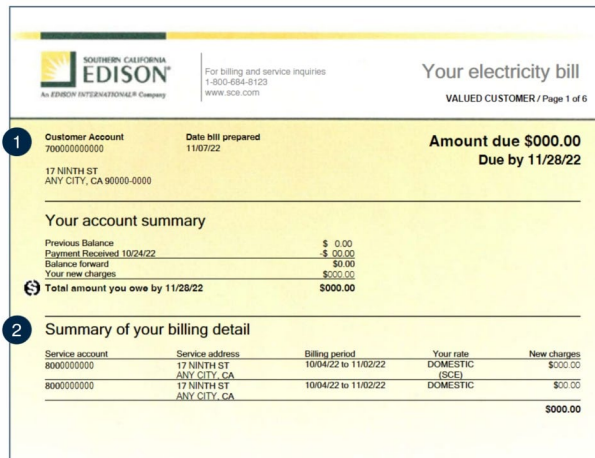
Eligibility applications will open on March 12, 2026 and close on April 5, 2026. Applicants who meet the eligibility criteria will be entered into a lottery and selected at random after applications close.

Application Process

Eligibility Application

1. Provide applicant identification information:
 - a. First and last name
 - b. Contact information
2. The applicant must verify their eligibility
 - a. Attest to being a renter at primary residence
 - b. Enter the service address and service account. Information can be collected from a recent utility bill. An example of an SCE bill is depicted below.

- i. Service Address (#1 identifies where your service address can be found)
- ii. Service Account Number (#2 identifies where the Service Account information can be found)



- 3. Optional: Opt into participating in pre- and post-appliance delivery surveys, if selected
- 4. Share where the applicant heard about the program
- 5. Optional: Opt into receiving emails on OCPA’s other programs
- 6. Agree to the Terms and Conditions

Optional Surveys

Renters have the option to participate in two surveys: pre-delivery and post-delivery. Each survey will cover questions related to equipment and usage. Survey responses will contribute to analyzing the impacts of the OCPA Renter Energy Efficiency Program. All selected applicants who opt in will receive a \$25 virtual gift card on the completion of **each** survey as a “thank you” for participating.

Appliance Delivery

Equipment delivery will occur at the address provided in the eligibility application. After the application and selection process is complete, delivery timelines will be communicated directly to selected participants. Delivery services are limited to standard ground delivery practices. No in-home placement or setup assistance will be provided.

Program Timeline

Eligibility application window	March 12 - April 5, 2026
Applicant selection and notification	April 16, 2026
Pre-delivery survey window (<i>optional</i>)	April 16 - April 30, 2026
Appliance delivery window	*Shared with selected participants

Post-delivery survey window <i>(optional)</i>	August 10 - August 24, 2026
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Terms & Conditions Acknowledgement

As part of the application, participants will be required to review and acknowledge the [Terms and Conditions](#) of the OCPA Renter Energy Efficiency Program. This acknowledgment is included directly in the online application and must be completed to submit the application and qualify to receive the appliances.

The Terms and Conditions outline key program requirements, including applicant eligibility and appliance delivery details. By providing this acknowledgment, participants confirm that all submitted information is accurate to the best of their knowledge and that they agree to comply with the program's rules and requirements.

ORANGE COUNTY POWER AUTHORITY
Staff Report – Item 9

To: Orange County Power Authority Board of Directors

From: Joe Mosca, Chief Executive Officer

Subject: CHIEF EXECUTIVE OFFICER’S REPORT

Date: March 9, 2026

Revenue Deferral Transfer

As planned in the FY2025/26 Budget, OCPA will utilize the \$45 million in previously deferred revenue from FY2023/24 - \$15 million in FY2024/25 and \$30 million in FY2025/26 - to help offset the anticipated revenue shortfall. This shortfall is primarily driven by the continuation of the 2024 rate design in 2025 and the City of Irvine’s shift from 100% Renewable Choice to Basic Choice. This strategic use of deferred revenue aligns with the Board-approved Rate Stabilization Policy and serves as a key financial tool to support long-term rate stability and affordability. By proactively reallocating these funds, OCPA strengthens its ability to manage financial risks, stabilize rates, and protect customers from market volatility.

2026 Strategic Planning Workshop

This year's Strategic Planning Workshop is set for March 18th from 11:00 AM to 5:00 PM. Please double-check that this important date is in your calendar. We will dedicate a couple of our upcoming weekly briefings to discussing your priorities for the year ahead, which will guide and inform the discussion on March 18th.

Communications & External Affairs Updates

Communications

- Thank you to the Board for your adoption of the Community Power Plan, which is a program framework that will guide the development of programs over the next 5 years and beyond. The full plan is now published on the [OCA website](#), where you can also view a reactive [dashboard](#) of data.
- OCPA's second [Picturing a Better Tomorrow](#) student art contest closed this past week. Students in grades TK-6 from OCPA member cities were eligible to enter their original art for the chance to win a prize of four tickets to Knott’s Berry Farm.
- OCPA staff continues its transparent communication and misinformation correction about locking generation rates for 2026.

- OCPA's [February Newsletter](#) was sent out to over 6,100 recipients. The lead story in the newsletter was OCPA locking in its 2026 rates.
- The 2026 Rate Lock blog was also promoted on OCPA's social media channels, and it is linked on our website's homepage carousel.

Community Engagement & External Affairs

- We hosted our annual Multicultural Community Leaders Luncheon, with 28 community leaders from communities and organizations across Orange County. This event has fostered numerous partnerships for OCPA, including contracts for translation services and community outreach support, and has increased the diversity in applications for OCPA's grant programs. This year, OCPA shared information on its latest programs and organizational successes while sharing insight into the 2026 rate lock.
- OCPA hosted the Orange County Hispanic Chamber of Commerce monthly mixer, where we met with local business owners and nonprofit representatives. Approximately 80 people attended, and OCPA was able to share a brief overview of what we do and the benefits we offer our communities.
- Staff attended the Fountain Valley Community Strategic Planning Session that was attended by a cross-section of local stakeholders and community leaders. We had the opportunity to engage with updates about OCPA.
- Staff also attended the Mayor's Prayer Breakfast in Garden Grove, which resumed this year after a 14-year hiatus. We engaged with the stakeholders in attendance, including City staff.
- OCPA was present at the OCBC Annual Board Installation, where we connected with elected officials and business stakeholders from across the county.
- Staff attended the UCI Sustainability fair at the UC Irvine campus. We connected with multiple student sustainability groups, including the students managing the Sustainable Resource Center, Engineers Without Borders (which works with local and international climate-vulnerable communities), and Garrett Hurley, Director of the Sustainable Resource Center at UC Irvine.
- Staff and Community Advisory Committee members attended the Sustain SoCal Regional Readiness & Resiliency Event. Discussion topics included *The Road to Climate Action and Adaptation Plans*, which provided guidance on navigating the lack of federal support and the changes to the City Council with each election cycle. Recommendations included sharing cost-benefit analysis and avoided costs, promoting additional benefits and getting community support, and highlighting environmental justice (Orange County population stats: 33% currently on Medical, 58% of those on Medical are in a red zone with multiple environmental justice impacts, unemployment is 3% higher than the national average).
- OCPA staff and Community Advisory Committee members attended the Fountain Valley Mayor's Breakfast this week, where we connected with city leadership and community leaders.
- We also attended the Asian Business Association's Lunar New Year Luncheon, where OCPA was acknowledged for its support of the organization and the community.
- This past week, OCPA was proud to sponsor and table at the Irvine Lunar New Year event, where attendance was around 6,000. We engaged in numerous customer

conversations, including numerous asks about OCPA's current programs. One customer requested information on how to return to OCPA and was interested in our programs for renters.

- Staff is supporting students participating in the Sustain OC Foundation's Sustainable Campus Challenge, which OCPA is sponsoring. We're providing information on CCA and the benefits of community energy as they analyze their campus's energy consumption.
- Staff attended the Buena Park Collaborative and Irvine Sustainability Commission meetings.
- OCPA attended and sponsored the Santa Ana Mayor's Prayer Breakfast, where we connected with nonprofit and local leaders from across the city.
- Staff also attended the OC Soccer Annual Fundraising Gala hosted in Costa Mesa, where we connected with leaders and organizations from Irvine and Costa Mesa. We also reconnected with leadership from OC Soccer, which is an OCPA Green P100NEER.
- Staff tuned into the Costa Mesa City Council meeting this week to hear the preliminary results and recommendations from the City's Climate Action and Adaptation Plan. The recording of the CAAP discussion is at hour three on the Costa Mesa YouTube Channel. <https://www.youtube.com/@CostaMesaTV>.
- OCPA attended and tabled at the Lunar New Year celebration at the Great Park, sharing information about OCPA and connecting with the community.

Customer Programs

- Community Power Plan: The full plan is now published on the [OCPA website](#), where you can click a link to view a reactive [dashboard](#) of data.
- *NEW* Renter Energy Efficiency Program: This new program will be presented to the Board in March for review and adoption. It will use funds in the Board-approved FY25/26 Programs budget, which were allocated to a high-priority program out of the Community Power Plan (CPP). This program was identified as first to launch because direct-to-renter electrification and demand response were the top priority identified in the CPP, benefiting from easier implementation. The program provides a set of no-cost equipment to renters who do not need landlord approval to implement: a plug-in HVAC paired with a portable battery. The aim is not only to help customers electrify, but also for these appliances to save customers money by curbing the use of central heating and air.
- *NEW* Energy Efficiency Showcase: The team is working on a partnership with the U.S. Green Building Council (USGBC) to bring their BuildSMART Trailer to member cities. This mobile exhibit features energy-efficient and sustainable home technologies and is a cost-effective means of promoting efficiency education to a wide array of customers attending a community event. USGBC staff provides hands-on guidance, and OCPA staff will share information on energy programs.
- *NEW* Educational Webinar: The team is developing a residential affordability webinar to help customers better understand electricity rate structures and identify practical strategies to manage their energy costs. The webinar will support education and the lack of

program awareness identified in the Community Power Plan. We hope to have this take place in April.

- Equitable Building Decarbonization Direct Install Grant: The program has soft-launched, with the interest and enrollment form going live. We are finalizing a contract with Orange County United Way to support community outreach based on a formal RFQ process, and will be sending a mailer to generate initial interest in the program.
- Energy Efficiency Kits: The program is officially at capacity, having given out 1,500 free kits to OCPA customers. We are completing program results now and will provide them to the Board next week.
- Residential Battery Rebate Program: To-date, 50 applications have been approved, 25 claims have been requested, 16 claims have been approved, and 12 rebates have been sent. Program applications will be accepted until May 2026.

Human Resources Updates

Recruitment

- External Affairs Manager: The position remains open, with final interviews scheduled in March.
- Board Clerk & Executive Assistant to the CEO: The selected candidate has successfully cleared the background check and is scheduled to begin on March 16, 2026.

Events & Stakeholder Outreach

The OCPA team attended the following events and community meetings since our last Board meeting:

Date	Day of the Week	Organization	Event Title	Member Agency	Start Time	End Time
2/9/2026	Monday	City of Fullerton	Fullerton Women's Club Meeting	Fullerton	6:00 PM	8:00 PM
2/9/2026	Monday	University of California - Irvine	UCI Lunar New Year Events	Irvine	3:30 PM	6:00 PM
2/11/2026	Wednesday	City of Irvine	Sustainability Commission	Irvine	4:00 PM	5:30 PM
2/12/2026	Thursday	Buena Park Collaborative	Monthly Meeting	Buena Park	10:00 AM	12:00 PM
2/12/2026	Thursday	OC Grantmakers	OC Grantmakers/OneOC Networking Event	Orange County (All)	4:30 AM	6:30 AM

2/13/2026	Friday	Asian Heritage Association	Lunar New Year Flower Street Festival	Orange County (Fountain Valley)	3:00 PM	10:00 AM
2/18/2026	Wednesday	City of Fountain Valley	Mayor's Breakfast	Fountain Valley	8:00 AM	9:00 AM
2/19/2026	Thursday	Asian Business Association - Orange County	ABAOC Lunar New Year Luncheon	Orange County (Irvine)	11:30 AM	1:00 PM
2/19/2026	Thursday	Sustain SoCal	Regional Readiness & Resilience	Irvine	1:00 PM	7:00 PM
2/26/2026	Thursday	Orange County Business Council	2026 Annual Dinner & Installation of the Board of Directors	Orange County (All)	5:00 PM	8:00 PM
2/26/2026	Thursday	OC Hispanic Chamber of Commerce	Business Mixer: Orange County Power Authority	Irvine	5:00 PM	7:00 PM
3/5/2026	Thursday	Office of Cottie Petrie-Norris	Women of the Year Event	Orange County (Irvine)	5:00 PM	6:30 PM
3/5/2026	Thursday	City of Fountain Valley	2026 Fountain Valley State of the City	Fountain Valley	n/a	n/a

We are looking forward to many opportunities to engage with the community and key stakeholders, including:

Date	Day of the Week	Organization	Event Title	Member Agency	Start Time	End Time
3/9/2026	Monday	Fullerton Collaborative	OCPA Presents New Programs for Renters	Fullerton	n/a	n/a
3/9/2026	Monday	City of Irvine	2026 Irvine State of the City	Irvine	n/a	n/a
3/12/2026	Thursday	Buena Park Collaborative	Monthly Meeting	Buena Park	10:00 AM	12:00 PM
3/12/2026	Thursday	CSUF Fullerton	Sustainable Campus Tour	Fullerton	10:00 AM	11:00 AM
3/12/2026	Thursday	Buena Park Middle School	Career Night	Buena Park	5:00 AM	7:00 AM
3/13/2026	Friday	Coastline RFP	Coastline RFP Advisory Committee Meeting	Orange County (Irvine)	4:00 PM	6:00 PM

3/20/2026	Friday	Quantum eMotion	Women In Tech Symposium	Irvine	11:00 AM	4:00 PM
3/25/2026	Wednesday	City of Fullerton	Fullerton Youth Government Day	Fullerton	9:00 AM	1:00 PM
4/2/2026	Thursday	South Orange County Economic Coalition	Meet the Mayors	Orange County (All)	8:30 AM	10:00 AM
4/2/2026	Thursday	City of Irvine	OCPA Presents at Electrification 101	Irvine	6:00 PM	8:00 PM
4/4/2026	Saturday	City of Buena Park	Earth Month Sustainability Fair	Buena Park	8:00 AM	12:00 PM
4/9/2026	Thursday	Buena Park Collaborative	Monthly Meeting	Buena Park	10:00 AM	12:00 PM
4/11/2026	Saturday	OC Hispanic Chamber of Commerce	The Estrella Awards	Orange County (All)	n/a	n/a

Attachments:

Attachment A – Non-Power Supply Contracts In Excess of \$50,000 to Under \$100,000

Orange County Power Authority
Non Power Supply Contracts In Excess of \$50,000 to Under \$100,000

Item No	Vendor	Term	Contract Amount	Brief Service Description	Remark
1	Ebee Connect	3/1/2026 – 2/29/2028	\$90,000	Multilingual Translation Services	