

AGENDA

ORANGE COUNTY POWER AUTHORITY REGULAR MEETING OF THE BOARD OF DIRECTORS

**Monday, April 13, 2026
2:00 p.m.**

This meeting will proceed as an in-person meeting at **15310 Barranca Parkway, Suite 250, Irvine, CA 92618 and 303 W. Commonwealth Avenue, Fullerton, CA 92832**. 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: 897 1187 9524

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 MARCH 9, 2026**

Recommended Action:

Approve as submitted.

2. **MINUTES FOR THE SPECIAL BOARD MEETING OF MARCH 18, 2026**

Recommended Action:

Approve as submitted.

3. **LEGISLATIVE AND REGULATORY UPDATE**

Recommended Action:

Receive and file.

4. PUBLIC OUTREACH UPDATE FOR JANUARY – MARCH 2026

Recommended Action:

Receive and file.

5. RISK OVERSIGHT COMMITTEE (ROC) UPDATE

Recommended Action:

Receive and file.

6. COMMUNITY ADVISORY COMMITTEE (CAC) 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 RESOLUTION APPOINTING ROGELIO PALACIOS AS ORANGE COUNTY POWER AUTHORITY'S SECRETARY

Recommended Action:

Adopt a resolution appointing Rogelio Palacios as Secretary for the Orange County Power Authority.

2. APPROVE FIRST AMENDMENT WITH THE ENERGY COALITION

Recommended Action:

Authorize the CEO to negotiate, finalize, and execute an amendment to the Professional Services Agreement with The Energy Coalition (TEC) for technical assistance, program implementation, and grant support services, extending the term one year through September 17, 2027, increasing the not-to-exceed amount for services by \$240,000 to support ongoing technical assistance and program implementation, and adding a separate authorization for TEC to administer up to \$997,000 in passthrough program costs, such as purchasing electric program equipment on behalf of OCPA and providing program incentives to OCPA customers.

3. APPROVE OCPA'S STRATEGIC PLAN FOR FISCAL YEAR 2026-2027

Recommended Action:

1. Approve the OCPA Strategic Plan for Fiscal Year 2026-27, as presented in Attachment A, establishing the Board's strategic priorities and direction for the upcoming fiscal year.
2. Authorize the Chief Executive Officer to finalize the plan based on Board of Directors feedback, if applicable.

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, March 9, 2026

1. CALL TO ORDER

Chair Sonne called to order the Regular Meeting of the Orange County Authority Board of Directors at 2:08 p.m. on Monday, March 9, 2026.

2. PLEDGE OF ALLEGIANCE

Director Grandis led the Pledge of Allegiance.

3. ROLL CALL

Present:	Director Glenn Grandis	City of Fountain Valley
	Director Fred Jung	City of Fullerton
	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

Mike Rough and Vicki Johnson commented on Regular Calendar item 8.1 and presented a flyer to the Board regarding the OCPA bill differences and budget projections.

5. PUBLIC COMMENTS ON NON-AGENDA ITEMS

Community Advisory Committee Chair Dominic Bendinelli introduced himself to the Board and said he is looking forward to serving another term as Chair and working with the Board.

6. DIRECTOR ANNOUNCEMENTS

None.

7. CONSENT CALENDAR

Moved by Director Jung, seconded by Vice Chair Mai to:
Approve consent calendar 7.1 – 7.8.

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 FEBRUARY 9, 2026

Action Taken:

Approved as submitted.

2. COMMUNITY ADVISORY COMMITTEE REPORT

Action Taken:

Received and filed.

3. LEGISLATIVE AND REGULATORY UPDATE

Action Taken:

Received and filed.

4. STRATEGIC PLAN MONTHLY STATUS REPORT

Action Taken:

Received and filed.

5. PUBLIC OUTREACH UPDATE FOR JANUARY – FEBRUARY 2026

Action Taken:

Received and filed.

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

Action Taken:

Received and filed.

7. APPROVE BOARD OF DIRECTORS COMPENSATION / REIMBURSEMENT POLICY UPDATE

Action Taken:

Approved 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:

Received and filed.

8. REGULAR CALENDAR

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

Chief Financial Officer Tiffany Law presented the item and began with the mid-year Budget timeline and said the mid-year update incorporates actual financials through December 2025, as well as an updated January through June 2026 forecast based on known costs and trends. She noted that on June 9, 2025, the Board approved the FY 2025-26 Operating Budget and voted to keep OCPA's generation rates the same through 2026. Law presented a PowerPoint presentation which showcased the 2025/2026 mid-year budget versus approved budget comparison; OCPA electricity revenue; investment income; and cost of energy.

Moved by Director Jung, seconded by Vice Chair Mai to approve Fiscal Year 2025-26 Mid-Year Operating Budget Amendment, as proposed in Attachment 1.

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. RENTER ENERGY EFFICIENCY PROGRAM

Energy Programs Manager Pranesh Venugopal presented the background of the Community Power Plan (CPP) and said the full plan is available on the OCPA website at ocpower.org/community-power-plan. He outlined the operating expenses, renter energy efficiency program, member city demographics, the application process, timeline, outreach and education, portable HVAC equipment features, and other direct-to-renter programs. Venugopal said this program is designed to address a gap in energy programs, program access across the OCPA service territory for renters.

The Board members discussed the budget, funding and reasons for specific timelines. They asked whether an audit of renters could be conducted to ensure those receiving the benefits are truly renters and not homeowners. There was a brief discussion on outreach to those that are on FERA and CARE.

Action Taken:

Received and filed.

No Motion Necessary.

9. STAFF REPORT

CEO Joe Mosca provided his full report in the agenda packet. He said he, along with Director of Power Resources Louis Ting and Regulatory Analyst Matt Chill, joined the staff of other CCAs, Board members from other CCAs, and staff from CalCCA to visit the Diablo Canyon Nuclear Power Plant last Friday. Mosca said the Diablo Power Plant is the last operational nuclear power plant in the state of California, which produces about eight to ten percent of the state's electricity. He discussed the decommissioning timeline and said the visit leveled up our understanding of this facility. Mosca said we will be ready to engage to ensure our ratepayers are protected if legislation is introduced. Mosca said OCPA staff will not take a position on this, and he will bring the matter back to the Board's attention and discuss when necessary.

10. ADJOURNMENT

With no further business to come before the Board, Chair Sonne adjourned the March 9, 2026, Orange County Power Authority Board Regular meeting at 3:12 p.m.

Chair Sonne noted that the next Orange County Power Authority Board of Directors Regular meeting will be held on Monday, April 13, 2026, at 2:00 p.m.

Submitted by:

Lisette Chel Walker, Interim Board Clerk



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

Wednesday, March 18, 2026

1. CALL TO ORDER

Chair Sonne called to order the Special Meeting of the Orange County Power Authority Board of Directors at 11:06 a.m. on Wednesday, March 18, 2026.

2. PLEDGE OF ALLEGIANCE

Joe Mosca, Chief Executive Officer, led the Pledge of Allegiance.

3. ROLL CALL

Present:	Director Kathleen Treseder	City of Irvine
	Director Glenn Grandis	City of Fountain Valley
	Director Fred Jung	City of Fullerton
	Vice Chair James Mai	City of Irvine, Arrived at 11:14 a.m.
	Chair Susan Sonne	City of Buena Park

4. PUBLIC COMMENTS ON AGENDA ITEMS

Vicki Johnson, City of Laguna Woods resident, commented on OCPA and Southern California Edison rate differences for the next couple of years.

5. ANNUAL BOARD STRATEGIC PLANNING WORKSHOP

Chair Sonne requested that staff facilitate the workshop.

The Board conducted its Annual Strategic Planning Workshop, facilitated by Girish Balachandran of GB Endeavors. The workshop was organized into three sessions covering the organization's current position, strategic direction, and board input on priorities for Fiscal Year 2026–27.

Session 1: Where We Are — Staff Presentations

Staff presented overviews of OCPA's current position across five functional areas: Financial Landscape (CFO Tiffany Law), Power Supply and Procurement (Director Louis Ting), Policy and Advocacy (CEO Joe Mosca), Product Strategy (CEO Joe Mosca), and Member Cities and Engagement (Director Jacquie Henderson). Presentations addressed rate competitiveness, power portfolio management, legislative engagement, product structure, and community outreach. Board members asked questions and engaged in discussion following each presentation.

Session 2: Where We're Going — Board Dialogue

The Board engaged in facilitated dialogue on three strategic topics. Input was captured on flip charts and is reflected in the themes summarized below.

1. Policy and Advocacy: The Board expressed support for proactive legislative engagement and interest in board members playing a more active, coordinated role in outreach to elected officials at the state and local levels. The Board emphasized the importance of strategic, targeted engagement rather than ad hoc efforts.
2. Product Direction: The Board expressed unanimous support for staff to conduct a comprehensive product evaluation study. Key interests included affordability, enrollment impacts, the connection between product structure and the planned cost-of-service analysis, and learning from other CCAs' experience with similar transitions.
3. Community Engagement and Expansion: The Board discussed strategies for strengthening OCPA's value proposition, improving communications with member city councils, and supporting thoughtful growth. Board members expressed interest in being more actively involved in community events and engagement activities.

Session 3: What We Heard — Synthesis and Parking Lot

The facilitator synthesized the Board's input and the Board identified additional items for follow-up consideration. Key areas of continued interest included:

- Board orientation and education sessions, including opportunities to learn from other CCAs
- Affordability as a central priority, including the timeline and scope of the cost-of-service study
- Strengthening OCPA's value proposition and communications strategy
- Opportunities for collaboration with other CCAs
- External dynamics affecting the energy landscape, including oil market impacts and data center demand
- Maintaining strong customer programs alongside financial sustainability

The Board expressed appreciation for the workshop format, the quality of staff presentations, and the collaborative atmosphere. Board members noted the organization's maturation since its founding and expressed strong alignment on strategic priorities.

Consistent with the agenda, the Board received staff presentations on OCPA's strategic position, participated in facilitated dialogue on strategic priorities, and provided input to inform the development of the FY 2026–27 Strategic Plan. Staff will use the board's input to prepare a Strategic Plan Framework for Board consideration at a future meeting.

Director Jung left the meeting at 1:27 p.m.

Actions Taken: No action was taken by the Board of Directors.

6. ADJOURNMENT

There being no further business to come before the Board, Chair Sonne adjourned the March 18, 2026, Orange County Power Authority Board Special meeting at 2:33 p.m.

Submitted by:

Lisette Chel Walker, Interm Board Clerk

ORANGE COUNTY POWER AUTHORITY
Staff Report – Item 7.3

To: Orange County Power Authority Board of Directors

From: Matt Chill, Regulatory Analyst

Approved By: Joe Mosca, Chief Executive Officer

Subject: LEGISLATIVE AND REGULATORY UPDATE

Date: April 13, 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, 2026. The deadline for spot bills was March 25, 2026. Now that the spot bill deadline has passed, OCPA has narrowed down the 115 bills it was tracking to 100

bills. A summary of all 100 bills is included as Attachment 1. In addition to the CalCCA-sponsored bills, OCPA is closely tracking two bills related to dynamic rates, which are rates that seek to more closely align customer rates with real-time wholesale electricity prices. OCPA is also closely tracking bills that pertain to Diablo Canyon Power Plant.

CalCCA Sponsored Legislation

As a reminder, 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). These bills are part of our strategy to address energy affordability concerns and ultimately drive down costs for OCPA customers' bills. No single effort or solution will solve the energy affordability challenges facing ratepayers throughout the state. Instead, meaningfully reducing the high cost of electricity bills in California will require many small-to-moderate enhancements, such as these, in combination.

Fact sheets are included as attachments 2 and 4 for AB 1138 and SB 1138, respectively. 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

Background: This bill 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.

Update: This bill is set to be heard at the Senate Energy, Utilities, and Communications Committee on April 7, 2026.

AB 1761

Background: This bill would require all data used to inform the PCIA calculation and other rate elements from the CPUC and investor-owned utilities (IOUs) be made available to all LSEs and ratepayer advocates on behalf of impacted customers.

Update: This bill was heard in the Assembly Utilities and Energy Committee on March 18, 2026 and passed with amendments on a 15-0 vote. Amendments were released on March 19, 2026. The bill will next be considered in the Assembly Appropriations Committee.

Dynamic Rates Bills

Background: AB 1787, authored by Assemblymember Schultz, and AB 710, authored by Assemblymember Irwin, would mandate the use of dynamic rates in some form. OCPA believes optional dynamic rates could provide benefits to certain customers (i.e., some commercial & industrial customers), but does not want to cede ratemaking autonomy to act in its customers' best

interests. AB 710 has passed through the Assembly with a 61-2 vote on January 26, 2026, while AB 1787 is progressing through Assembly committees.

Update: AB 1787 passed through the Assembly Utilities and Energy Committee on March 18, 2026 with amendments with a 13-0 vote. The next steps for the bill will be to pass the Assembly Appropriations Committee.

Diablo Canyon Bills

SB 931, introduced by Senator Laird, was originally slated to require greater stringency with flamethrower safety permits but was amended on March 25, 2026 to ensure continued funding for communities impacted by Diablo Canyon Power Plant. Specifically, this bill would ensure that the Community Impacts Mitigation Program is continued at full funding for the duration of Diablo Canyon's extended operations through 2030. This program funds initiatives intended to offset local impacts of the power plant such as fire protection, public safety response, and local schools.

Federal Matters

In early March, federal activity included the release of a Ratepayer Protection Pledge by the White House on March 4, 2026, signed by several large technology companies, committing to mitigating long-term electricity cost impacts associated with data center growth.

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.

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. A final Commission Decision on Track 2 is expected at the September 3, 2026 Voting Meeting.

The CPUC is just starting to kick off Track 3 of the proceeding, which deals with more general, structural change to the PCIA.

Update: CalCCA's reply brief for the Track 1 appeal is due on April 1, 2026.

In terms of Track 2, CalCCA filed the Rebuttal Testimony from Brian Dickman on March 23, 2026. The Joint IOUs also filed rebuttal testimony and basically reiterated their previous arguments. Cal Advocates also filed Rebuttal Testimony supporting CalCCA's proposal to provide value of Pre-2019 Banked RECs via the PCIA. Cal Advocates slightly disagreed with CalCCA on the amount of value that should be provided to these RECs, though, because they believe that the MPB would overvalue the Pre-2019 Banked RECs since they aren't all PCC1 RECs, which are RECs that bundle the "renewable attributes" of the RECs with the actual electricity delivery. They believe pre-2019 banked RECs better represent a blend of PCC1 and PCC3 RECs, which are unbundled RECs that do not include the physical delivery of energy. So, they assert that another methodology should be used to value them that appropriately derates their value.

On March 27, 2026, the CPUC released a Staff Report and Proposals on Pre-2019 Banked RECs. This staff report does not draw a conclusion regarding the balance of indifference between departed and bundled load. The CPUC acknowledges merits and challenges to the arguments of both CalCCA and the IOUs. The CPUC may end up choosing a proposal that finds a middle-ground and values the Pre-2019 Banked RECs for unbundled customers that paid for a share of them but not at the full RPS MPB. The CPUC Offers four Proposals for Valuing Pre-2019 Banked RECs:

1. Load-Share Weighted RPS MPB
2. Department of Energy (DOE) REC Value
3. 50/50 Split
4. Adjusted Weighting Mechanism

Next steps with Track 2 will be an Evidentiary Hearing on April 28, 2026 if the CPUC determines one is necessary. Following this will be opening briefs and opening comments on the CPUC's Staff Proposal due on May 22, 2026. Reply briefs and reply comments on the staff proposal will be due on June 5, 2026 with a proposed decision anticipated by July 31, 2026.

CalCCA submitted comments on Track 3 about the PCIA issues within scope and data access needs on March 27, 2026. CalCCA's primary argument within these comments is that it is essential that CCAs have equal access to data as the IOUs such that all parties submitting recommendations to enhance the PCIA are on equal footing to submit meaningful proposals.

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

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.

CalCCA's Track 1 Proposals recommend the CPUC:

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.

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

Update: The RA rulemaking is being reassigned from former CPUC President Alice Reynolds to John Reynolds, her successor.

Parties submitted comments on Track 1 proposals on March 6, 2026, and submitted reply comments on March 20, 2026. CalCCA's reply comments focused on responses to CalCCA's proposals, as well as referencing other party comments about the central procurement entities for Local RA.

Despite the CPUC's disappointing Report on Transactability, CalCCA filed its proposal for RA Slice of Day (SOD) Transactability on March 3, 2026. CalCCA pushed back on the CPUC's Transactability Report. CalCCA was the only party to file a proposal. Reply comments on this proposal are due by April 20, 2026.

The CPUC hosted a hybrid workshop on RA SOD Transactability on March 9, 2026. CalCCA similarly countered CPUC arguments against transactability at this workshop, but believes that implementation of Transactability is unlikely to occur at this time through regulatory pathways. SB 1138 is the most likely pathway towards RA SOD Transactability in the near-term.

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 RCPMP, if adopted, will occur in this new IRP rulemaking.

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.

On February 26, 2026, the CPUC voted unanimously (5-0) to approve a Procurement Order for 6,000 MW of clean capacity for LSEs throughout the state. 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

Update: On March 9, 2026, the CPUC approved CalCCA's joint request – supported by AReM, PG&E, SCE, SDG&E, Shell, and the UC Regents – to extend the deadline for LSE IRP filings from June 1, 2026 to August 10, 2026. Many LSEs found that completing these filings by the original deadline would have been difficult and burdensome. This extension will help provide needed relief to LSEs.

Shortly after this extension was granted, the CPUC released several updated workbooks that will enable OCPA and all Load Serving Entities (LSEs) to accurately complete their individual IRP filings.

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.

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: 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.

On March 2, 2026, CalCCA submitted comments on the PD to pause the delivery of the residential climate credit, which was slated for distribution in April. CalCCA's comments focused on potential concerns with customer confusion about why the Climate Credit is not being provided to them in April. CalCCA was also concerned about language in the PD that implies that the IOUs are the source of the Climate Credit.

On March 17, 2026, the CPUC released updates to the PD to pause the 2026 Climate Credit. The CPUC addressed one of CalCCA's concerns by updating language to clarify that the Climate

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.

Credit is distributed by utilities, but the money is not from the utilities, and instead comes from funds from the statewide Cap-and-Invest Program. Updates also emphasized that the full 2026 credits must be distributed this year for the 2026 IOU ERRA forecasts to remain accurate, and that ensuring customers receive the full credit amount in 2026 is a high priority. The CPUC also states that it is unnecessary to conduct proactive messaging via mass mailers or bill inserts since those would add costs and there is insufficient time to implement the materials. The CPUC voted to approve this revised decision (D.26-03-013) with a 5-0 vote on March 19, 2026.

The CPUC then released a PD on Phase 1A of the Climate Credit. This proposed decision would:

- Require the IOUs to distribute the credit in August and September due to these being two of the highest bill months for typical customers throughout California;
- Require the IOUs to update messaging on their websites with this info and are mandated to put messaging on-bill during these months listing the amount of savings and attributing those savings to the Climate Credit and the Cap-and-Invest Program.

The earliest This Phase 1A PD will be voted on is April 30, 2026. More wholesale Climate Credit change will occur at a later date via Phase 1B of the proceeding.

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: On March 10, 2026, the CPUC issued an Administrative Law Judge (ALJ) ruling proposing bridge-year funding for existing IOU demand response programs.

On March 26, 2026, the CPUC adopted Decision D.26-03-016 authorizing continuation of the Flex Alert paid media campaign for 2026 with a \$15 million budget, as was proposed via PD in February. This budget is lower than originally proposed within the December 30, 2025 staff proposal that suggested maintaining the same annual budget of \$22M.

Disconnections – R.18-07-005

Background: This proceeding was opened in 2018 to address rising disconnection rates from customer nonpayment of electric bills. The CPUC, within this proceeding, has issued several decisions instituting various rules and programs. CalCCA has been successful in ensuring CCA customers can participate in the various programs, including the Arrearage Management Plan (AMP) and the Percentage of Income Pilot Plan (PIPP), with CCA recovery of costs identical to the IOUs' recovery of costs.

Update: The CPUC hosted a hybrid workshop on March 11, 2026, which discussed the Arrearage Management Plan (AMP), Percentage of Income Payment Plan (PIPP), disconnection rate caps, and support for customers at risk of disconnection.

CalCCA then submitted comments on the remaining issues within the Disconnections proceeding on March 25, 2026. These comments recommend the CPUC:

- Open a successor rulemaking for consideration of the future of customer protections so that there is not a rush to solve all the remaining issues;
- Maintain the disconnection rate caps and reject the use of disconnections to reduce arrearages because they do not address underlying issues causing high arrearages;
- Reject the IOUs' recommendations to remove the prohibition on collecting deposits because doing so goes against the CPUC's ESJ Action Plan and is an inefficient way to reduce costs;
- Establish PIPP as a permanent program, with an evaluation of it after the four-year implementation period ends in 2026;
- Establish AMP as a permanent program with modifications (e.g., partial repayments count towards valid program payments);
- Reject the recommendation to require high-usage customers in PIPP to participate in an Energy Savings Assistance program;

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 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.⁶

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 a draft scoping order for the 2026 IEPR, including topics such as demand forecasting, large load treatment, and geothermal resource evaluation. CalCCA submitted comments on the Draft Scoping Order on March 25, 2026. Comments emphasized that the CEC should leverage CCA information about data centers and the CEC should be aware of and supportive of CalCCA's proposal within the RA proceeding to separate data center forecasting from the rest of the IEPR forecast since these loads are significant and it is worth spending the additional effort to maximize forecast accuracy for these new loads for RA cost allocation.

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.

⁶ 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.

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: On March 2, 2026, CAISO presented updates to its Interconnection Process Enhancements (IPE) 5.0 proposal, including progress on pathways for energy-only resources to achieve deliverability status.

South Coast Air Quality Management District Updates

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 NOx and SOx 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.

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 NOx ERCs, and there may be insufficient NOx 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 Rules 1146 & 1146.1 are the Landing Rules for Boilers, Process Heaters, and Steam Generators. They most importantly set NOx emission standards for Industrial, Institutional, and Commercial Boilers, Steam Generators, and Process Heaters. These rules have been implemented. As of 2018, NOx 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 2018.⁷

Now, SCAQMD is considering further strengthening Rules 1146 & 1146.1 by potentially requiring 5ppm as a NOx limit for all units or even reducing the emissions cap further.

Update: OCPA met with SCAQMD on March 13, 2026 to discuss findings of the recent Working Group Meeting, which discussed results of the technical feasibility and cost assessment. Though the SCAQMD only regulates scope 1 emissions, the conversation discussed potential opportunities for downstream emission reduction (e.g., scope 2 emissions) through CCA involvement and 100% renewable energy rates.

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.

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, Climate Credit, POLR, IRP, Large Load, Disconnections, DAC-GT, IEPR and RA proceedings
- Weekly CalCCA Legislative Policy meetings - including several Tiger teams such as Infrastructure, Diablo Canyon, Autonomy, and Affordability
- CalCCA Legislative Committee Meeting

⁷ 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.

- CalCCA Monthly CAISO meeting
- Stakeholder Policy meetings
- CalCCA Compliance meetings
- SCE ERRA Meetings
- 2026 Strategic Planning Workshop
- OCPA Staffer's Luncheon
- Legislative & Regulatory Committee Meeting
- CPUC Voting Meeting
- SoCalREN Advisory Committee Meeting
- 2026 Rate Design Team Meeting
- Meeting with SCAQMD about Rules 1146 & 1146.1
- DAC-GT Reviewing Representative Call

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 infraststructure	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 Utilites Comission: 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	Carillo	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.

Medium Priority

AB 1554	Calderon	Wildfire Fund	Wildfire Fund	Existing law establishes the California Earthquake Authority (CEA), administered under the authority of the Insurance Commissioner, to transact insurance in this state as necessary to sell policies of basic residential earthquake insurance. Existing law requires the CEA to annually report to the Legislature and the commissioner on the CEA's program operations, including the financial condition of the authority, and to post the report on the CEA's internet website. Existing law requires copies of a certified report examining the CEA's financial and program operations and verifying the annual report to be made public. This bill would additionally require the CEA to provide the annual report to the Senate Committee on Insurance and the Assembly Committee on Insurance. The bill would specify that the certified examination and verification report be posted on the CEA's internet website.	Re-referred to Com. on INS. on 3/3
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 1692	Pacheco	An act to amend Section 25000 of the Public Resources Code, relating to energy.	Administrative	This bill would make nonsubstantive changes to the provision naming the Warren-Alquist State Energy Resources Conservation and Development Act.	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	Nuclear	This bill would exempt a nuclear microreactor, as defined, from existing law that prohibits the State Energy Resources Conservation and Development Commission from certifying a nuclear fission thermal powerplant and states that nuclear fission plants are not a permitted land use in California unless certain conditions are met regarding the existence of technology pertaining to construction and operation of nuclear fuel rod processing and demonstrated technology or means for the disposal of high-level nuclear waste.	Re-referred to Com. on NAT. RES. March 17.

Medium Priority

AB 1774	Boerner	Electrical corporations: wildfire mitigation plans: expenditures.	Wildfire Fund	This bill would require the commission, before an electrical corporation is authorized to recover, collect, or expend ratepayer funds for new or ongoing wildfire mitigation programs, to require an independent audit of the electrical corporation’s wildfire mitigation expenditures incurred during the preceding 5 calendar years, as provided. The bill would require the commission to take certain actions, including disallowing recovery of the wildfire mitigation expenditures, if the commission determines that those expenditures are unreasonable, imprudent, or improperly incurred.	Re-referred to Com. on U. & E. March 23.
AB 1813	Ward	Commission: customer renewable energy subscription programs.	Renewables	Under existing law, the CPUC must evaluate all customer renewable energy subscription programs of the electrical corporations by March 31, 2024 to determine if the program has met its specified goals and determine whether it would be beneficial to establish a new tariff establishing a community renewable energy program. This bill would instead require the commission to evaluate those programs on or before March 31, 2027, and to establish the community renewable energy program, if applicable, on or before July 1, 2027. The bill would require each community choice aggregator and electric service provider to notify the commission whether it will participate in the program within 190 days, rather than 180 days, of the establishment of the program.	Re-referred to Com. on U. & E. March 23.
AB 1820	Schiavo	Electric vehicle charging stations: permit fees.	EV	This bill, until January 1, 2036, would prohibit a city, county, city or county, or charter city from charging a permit fee for an electric vehicle charging station that exceeds the estimated reasonable cost of providing the service for which the fee is charged, which cannot exceed \$100 plus \$15 per kilowatt for each kilowatt above 15kW for residential electric vehicle charging stations, and \$500 plus \$5 per kilowatt for each kilowatt between 51kW and 250kW, plus \$2 for every kilowatt above 250kW, for commercial electric vehicle charging stations, unless the city, county, city and county, or charter city provides substantial evidence of the reasonable cost to issue the permit as part of a written finding and an adopted resolution or ordinance, as provided.	Re-referred to Com. on L. GOV. March 17.

Medium Priority

AB 1821	Pacheco	California Public Records Act: fees and agency response time.	Data	This bill would require, if a single request exceeds 2 hours of search time, or if the total requests by a requestor exceed 10 hours of search time in one month, the requestor to also submit to the agency a payment of fees in an amount determined by the agency as reasonable to compensate the agency for the administrative time of completing the requests. The bill would exempt from that requirement a journalist, a newspaper, and an educational or noncommercial scientific institution, as specified. The bill would define “search” for purposes of that requirement to mean to review, either manually or by automated means, agency records for the purpose of locating those records that are responsive to a request.	Re-referred to Com. on JUD. March 17.
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.

Medium Priority

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.
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	Electrical corporations and gas corporations: rates: inflation-constrained rate case scenario: standard of review.	Rates	This bill would require the commission to require every electrical corporation or gas corporation, as part of every general rate case application, to submit an inflation-constrained rate case scenario in which cumulative increases in annual expenditures proposed to be authorized in that proceeding do not exceed the projected federal social security beneficiary cost-of-living adjustment, and to compare that inflation-constrained rate case scenario with the primary rate case plan submitted by the corporation.	Re-referred to Com. on U. & E. March 25.

Medium Priority

AB 2369	Rogers	Electricity: resource adequacy requirements: transmission facility planning.	RA	This bill would require that the resource adequacy program also achieve the objectives of recognizing a reliability contribution for energy-only resources that reflects the value of those resources in supporting grid reliability, maximizing the timely development and interconnection of certain energy resources, and promoting increased use of electrical grid infrastructure, as provided.	Re-referred to Com. on U. & E. March 23.
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.
AB 2459	Wallis	An act to add Section 65850.10 to the Government Code, relating to electricity.	EV	This bill would prohibit a local building authority from denying, withholding, or conditioning a certificate of occupancy to a nonprofit applicant solely on the basis that required vehicle charging stations are not fully operational, provided that certain conditions are met, including that the applicant has installed all vehicle charging infrastructure required by applicable law, regulation, or building code in the manner and to the specifications required.	Re-referred to Com. on L. GOV. March 23.

Medium Priority

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.
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.

Medium Priority

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.
AB 2516	Petrie-Norris	California Grid Manufacturing Initiative.	Infrastructure	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.	From printer. May be heard in committee March 23.

Medium Priority

AB 2518	Sharp-Collins	San Diego Gas and Electric Company: energization pilot program.	IOU Program	This bill would require, until January 1, 2032, San Diego Gas and Electric Company (SDGE) to energize an affordable housing development project within 40 business days from the date on which SDGE determines the project to be construction ready, as defined, and to prioritize the energization of affordable housing development projects over other residential energization projects under specified circumstances, as provided.	Re-referred to Com. on U. & E. March 23.
AB 2543	Ransom	Emergency preparedness: electric vehicle charging infrastructure.	EV	This bill would require, on or before June 1, 2027, the Office of Emergency Services to, in consultation with the State Energy Resources Conservation and Development Commission establish a working group to evaluate the resilience of publicly available electric vehicle fast charging stations during and following a disaster. The bill would require, on or before January 1, 2028, the working group to issue guidelines to city and county emergency managers on how its recommendations may be incorporated into local	Re-referred to Com. on E.M. March 23.
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.

Medium Priority

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	Public Utilities Commission: commissioners: employment.	CPUC	This bill would prohibit a commissioner of the commission from being employed by an entity subject to regulation by the commission for a period of 5 years after the end of the commissioner’s term of office.	From printer. May be heard in committee March 23.
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.

Medium Priority

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 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 2700	Gallagher	Electricity: rate reduction: report.	Rates	This bill would require the commission to generate a report outlining recommendations to decrease the kilowatt-per-hour rate for electricity charged to ratepayers by not less than 30% by January 1, 2028. The bill would require the commission, in making those rate-reduction recommendations, to take certain actions, including to review, and evaluate the cost effectiveness of, certain public purposes programs and to audit electrical corporation wildfire mitigation plan costs, as specified. The bill would require the	Re-referred to Com. on U. & E. March 24.
AB 2710	Bauer-Kahan	Public utilities: electrical and gas corporations: financial distress: public assistance.	Spot Bill	This bill would prohibit an electrical corporation or gas corporation from receiving public assistance, as defined, to avoid or recover from financial distress, as defined, unless the commission finds that the corporation has agreed to certain terms and conditions, including a requirement that shareholders contribute equity capital equal to not less than 25% of the total amount of public assistance provided. The bill would require an electrical corporation or gas corporation receiving public assistance to provide quarterly public reports detailing compliance with the terms and conditions for the public assistance, as specified. The bill would require the commission, before approving the public assistance, to make certain findings, including a finding that the public assistance is necessary to maintain safe and reliable utility service to California residents and businesses.	Re-referred to Com. on U. & E. 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.
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	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.	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	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.	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	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.	In Assembly. Read first time. Held at Desk.

Medium Priority

SB 804	Archuleta	Hydrogen pipeline safety	Hydrogen	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. 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.	Read second time. Ordered to third reading.
SB 842	Stern	Energy: firm zero-carbon resources	Zero-Carbon Resources	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.	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	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.	Referred to Coms. on E., U & C. and JUD.
SB 875	Wiener	Public utilities: eminent domain.	Public Utilities	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.	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	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.	Referred to Com. on E., U & C.
SB 887	Padilla	California Environmental Quality Act: environmental leadership development projects: data centers.	CEQA / Data Centers	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.	Set for hearing March 18.

Medium Priority

SB 905	Becker	Electricity.	Spot Bill	This bill would require the Energy Commission, in consultation with the Public Utilities Commission (PUC), to develop and implement the Policy-Oriented and Wildfire Electric Reimbursement (POWER) Program to reduce the costs to ratepayers by providing reimbursement to electrical corporations and local publicly owned electric utilities for expenditures driven by public policy goals that provide a benefit to the general public, as provided. The bill would establish the Policy-Oriented and Wildfire Electric Reimbursement Fund in the State Treasury and would require that moneys in the fund, upon appropriation by the Legislature, be expended by the Energy Commission for the purpose of the program. The bill would require the commission, when developing and implementing the POWER Program, to do specified things, including establish guidance and criteria for allocating reimbursements from the fund that require, among other things, that the proportion of any expenditures by an electrical corporation that are reimbursed pursuant to the POWER Program are excluded from the electrical corporation's rate base and any asset funded by those reimbursed expenditures be funded without a return on equity, as provided. The bill would require the Energy Commission to annually report to the Legislature actual utility bill impacts in order to ensure the POWER Program is helping to reduce electricity costs for ratepayers. The bill would prohibit the Energy Commission from using more than 3% of the moneys appropriated for the program or \$5,000,000, whichever is less, for administrative and overhead costs each year.	Re-referred to Com. on E., U & C. March 25.
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	Referred to Com. on E., U & C.
SB 925	McNerney	Fusion energy: State Energy Resources Conservation and Development Commission: strategic	Nuclear	This bill would require the Energy Commission, in coordination with specified agencies, to develop a strategic plan for the development of fusion energy in California, as specified. The bill would require the Energy Commission to submit the strategic plan to the Legislature on or before December 31, 2028.	Re-referred to Coms. on E., U & C. and E.Q. March 25.
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.

Medium Priority

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.
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Medium Priority

SB 1011	McNerney	Energy: Utility Infrastructure AI Safety, Oversight, and Workforce Protection Act.	IOU Oversight	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.	Referred to Coms. on E., U & C. and P., D.T., & C.P.
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Medium Priority

SB 1097	Wiener	California Environmental Quality Act: electrical distribution: clean energy: exemptions: standard of review.	Transmission	This bill would exempt from CEQA projects that consist of the inspection, maintenance, repair, restoration, reconditioning, reconductoring with advanced conductors, replacement, or removal of a transmission wire or cable used to conduct electricity or other piece of equipment that is directly attached to the wire or cable and that meet certain requirements. If a lead agency determines that a project is exempt from CEQA pursuant to the above-described provision, the bill would require the lead agency to file a notice of exemption with the Office of Land Use and Climate Innovation and the county clerk in each county in which the project is located, as provided.	From committee with author's amendments. Read second time and amended. Re-referred to Com. on RLS. March 25.
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.	Rates	This bill would require an electrical corporation or gas corporation proposing to change a rate or to alter a classification, contract, practice, or rule that would result in a new rate, based directly or indirectly on its request for return on invested capital, to include in its proposal certain information, as provided. The bill would require the commission, in approving the rate change, to take into account, and make specific findings related to, certain considerations.	From committee with author's amendments. Read second time and amended. Re-referred to Com. on RLS. March 25.
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 1359	Stern	Gas Transition Responsibility and Electrification Act.	Gas Utility Decarboniza	This bill would require that the obligation of a gas corporation to furnish service under these provisions be interpreted consistent with the state’s greenhouse gas emission reduction mandates and policies promoting building electrification, and would authorize the commission to authorize the retirement or discontinuation of natural gas distribution infrastructure where the commission finds that continued operation is inconsistent with the public interest, as provided.	From committee with author's amendments. Read second time and amended. Re-referred to Com. on RLS. March 25.
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 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 [f](#) [t](#) [@](#) [in](#)

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



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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

Steven Halligan



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

www.ocpower.org [f](#) [t](#) [@](#) [in](#)

ORANGE COUNTY POWER AUTHORITY
Staff Report – Item No. 7.4

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- MARCH 2026

Date: March 31, 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 the Public Outreach update for January – March 2026.

BACKGROUND

Following is a summary of the Orange County Power Authority (OCPA) Public Outreach efforts for the months of January – March 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 Future Farmers of America 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 four news releases: OCPA Secured First Green Prepayment Bond, 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
- Sustain SoCal Regional Readiness and Resilience Event
- Asian Business Association of Orange County Lunar New Year Luncheon
- OCPA Multicultural Community Leaders Luncheon
- Fountain Valley State of the City
- Orange County Hispanic Chamber of Commerce Networking Event
- Diablo Canyon tour
- Annual Women in Tech Symposium 2.0

Educational Tools

- Collaboration underway with the Orange County Department of Education to develop a renewable energy curriculum for grades 4-12 that includes four lessons built on the Next Generation Science Education Standards.

Coming Soon

- Earth Month events and promotions
- April newsletter
- Tentpole events: CicloIrvine, Fountain Valley Summerfest, Buena Park Energy Fair

- OCPA Unplugged season 3
- Level Up campaign
- Website remediation for ADA compliance

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 – March 2026.



ORANGE COUNTY
POWER AUTHORITY
YOUR CLEAN ENERGY CHOICE

| AGENDA ITEM X.X

MARKETING AND COMMUNICATIONS UPDATE
JANUARY – MARCH 2026

MARCH 31, 2026



HIGHLIGHTS

Public Outreach

- Released “Powering the Communities We Call Home” campaign
- Produced ‘rate lock’ communications
- Developed materials to promote the Renter Energy Efficiency Program
- Created a flyer to promote the SB 253 Large Company Reporting Requirements
- Distributed February Newsletter
- Hosted the second annual “Picturing a Better Tomorrow” Art Contest

Community Outreach

- Hosted Environmental Roundtable
- Hosted Community Leaders Luncheon
- Hosted Annual Staffers Luncheon
- Toured Buena Park Middle School’s Ag Center, which received a Bright Futures Grant to develop blog and posts
- Attended and sponsored the Fountain Valley State of the City and Mayor’s Breakfast
- Hosted Orange County Hispanic Chamber of Commerce Networking Event

Digital Communications

- Published the Community Power Plan on the website
- Added OCPA renewable energy plan comparison to website
- Filmed testimonial videos with three customers
- Photographed community members for ownable stock photography
- Updating metatags on website, updated homepage carousel,
- Developed new landing page for Renter Energy Efficiency Program



HIGHLIGHTS (Cont.)

Multicultural Outreach

- Print advertorial in World Journal that educates about OCPA and discusses the 2026 rate lock

Recognition

- Named Top 10 Green Power Sales in the U.S. by the National Laboratory of the Rockies

Media Releases

- Orange County Power Authority Secured First Green Prepayment Bond
- Calpine Community Benefits Grant recipient announcement
- OCPA announces 2026 Board Chair and Vice Chair
- OCPA maintains rates for 2026

Educational Tools

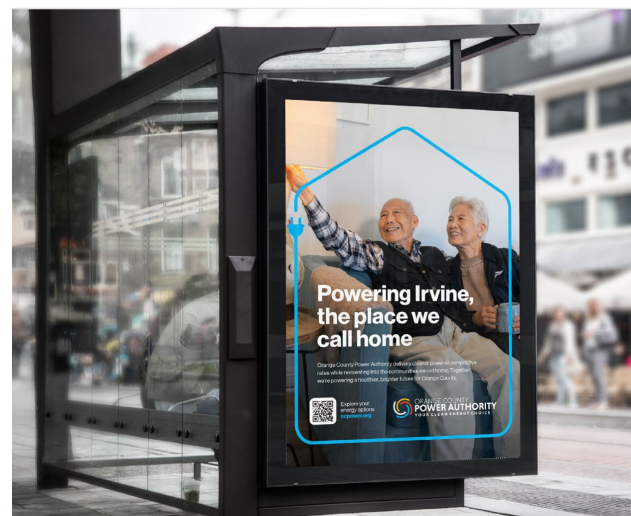
- Collaboration underway with the Orange County Department of Education to develop a renewable energy curriculum for grades 4-12 that includes four lessons built on the Next Generation Science Education Standards. Topics being considered include:
 - Universal lesson on energy, climate and community decisions
 - 4th grade lesson on renewable energy
 - 6th grade middle school lesson on environmental impact
 - High school lesson on siting a battery storage facility



PUBLIC OUTREACH

Brand Campaign Refresh

- Objective: Education
- Targeting: Cities of Buena Park, Irvine, Fullerton and Fountain Valley
- *NEW print, including multicultural publications, and bus shelter ads launch in market on 04.06.2026*





PUBLIC OUTREACH

- Released “Powering the Communities We Call Home” video campaign





PUBLIC OUTREACH

- Produced 'rate lock' communications (with several items still under development)

- Outreach presentation
- Plan comparison
- Website content
- Explainer video
- Social media posts
- Green Discount Program flyer
- CEO blog post
- Stakeholder one-sheet
- PCIA explainer pdf and FAQs



NEW

Green Discount Program Coming Soon

Orange County Power Authority (OCPA) will soon offer a new energy program designed to support low-income and cost-sensitive customers. This Green Discount Program will provide enrolled customers with up to 40% carbon-free energy at a generation rate of 7% less than Southern California Edison's equivalent generation rate.

The Green Discount Program will be available to non-solar (Net Energy Metering) residential customers, with participation priority given to customers enrolled in California Alternate Rates for Energy (CARE) and Family Electric Rate Assistance (FERA).

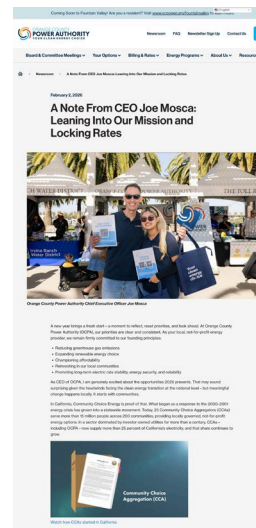
OCPA is committed to supporting households facing affordability challenges, and reinvesting in its communities to create long-term stability.

UP TO
40%

carbon-free energy
at a generation rate of
7% less than Southern
California Edison's
equivalent generation rate



For more information, call 1-866-262-7693
ocpower.org





PUBLIC OUTREACH

- 'Rate Lock' communications assets (continued)

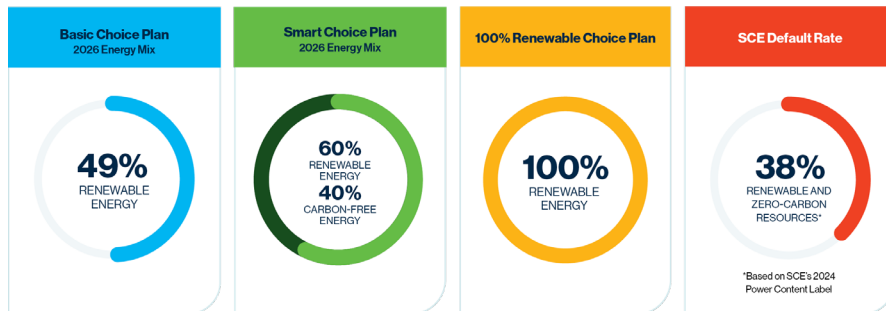
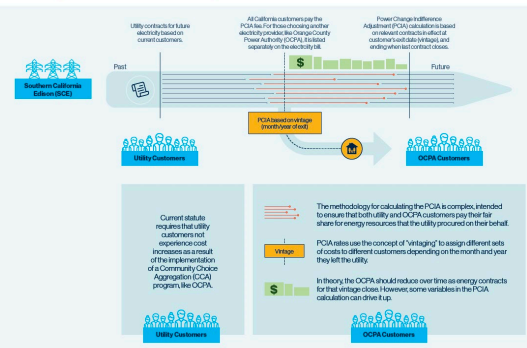
Average Residential Bill Comparison

With Orange County Power Authority, you have the power to choose the electricity service that's right for you.

Below is a snapshot of how OCPA rates compare today. OCPA's generation rates are locked in for 2026, giving customers stable and predictable pricing, while SCE's rates can change four to six times annually. OCPA's current average residential generation rate of 13.9 cents per kWh is about the same as SCE's average residential generation rate over the last 3 years.

Basic Choice Plan 2026 Energy Mix	Smart Choice Plan 2026 Energy Mix	100% Renewable Choice Plan	Southern California Edison
Basic Choice plan provides 49% renewable energy	Smart Choice plan provides 60% renewable energy and 40% carbon-free energy	100% Renewable Choice plan provides 100% renewable energy	Southern California Edison plans provide 38% renewable energy and zero-carbon resources *Based on SCE's 2024 Power Content Label
\$184.52 Average Cost	\$188.77 Average Cost	\$190.90 Average Cost	\$164.29 Average Cost
☒ Local Community Reinvestment	☒ Local Community Reinvestment	☒ Local Community Reinvestment	☒ Local Community Reinvestment
☒ Access to OCPA Rebates and Programs	☒ Access to OCPA Rebates and Programs	☒ Access to OCPA Rebates and Programs	☒ Access to OCPA Rebates and Programs
☒ Access to SCE Rebates and Programs	☒ Access to SCE Rebates and Programs	☒ Access to SCE Rebates and Programs	☒ Access to SCE Rebates and Programs
0.13862 Generation	0.14862 Generation	0.15362 Generation	0.12163 Generation
0.27014 SCE Electricity Delivery	0.27014 SCE Electricity Delivery	0.27014 SCE Electricity Delivery	0.27014 SCE Electricity Delivery
0.02541 Surcharges	0.02541 Surcharges	0.02541 Surcharges	(0.00522) Surcharges

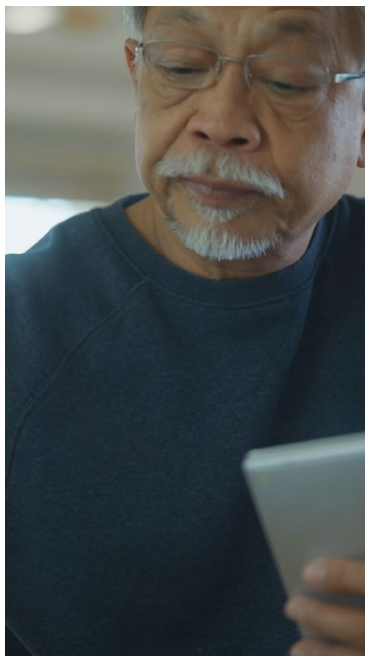
Understanding the Power Change Indifference Adjustment





PUBLIC OUTREACH

- A one-minute video explaining the 'rate lock' will be promoted on OCPA channels this month





PUBLIC OUTREACH

- Supported the Renter Energy Efficiency Program launch, including developing a flyer, landing page, social media, and a postcard mailer FERA and Medical Baseline customers

New No Cost Offer

Portable Heat Pump (Heating & Cooling) & Portable Battery

Available for renters, applications
open March 9 – April 5, 2026



Renter Energy Efficiency Program

Orange County Power Authority (OCPA) is bringing cooling and heating comfort directly to renters—with no landlord approval, no wiring changes, and no cost to you.

Using portable electric equipment will

- 01 Help improve your indoor air quality
- 02 Increase energy efficiency in your home
- 03 Reduce your environmental impact
- 04 Support a healthier Orange County

What's Included
While Supplies Last

- Portable heat pump for room-by-room cooling and heating
- Portable battery to help manage energy used and keep essential devices powered during a power outage

All equipment is plug-and-play and delivered directly to you.



Program Timeline

Application window:
March 12 – April 5, 2026

Eligible applicants will be added to an applicant pool and selected on a lottery basis, with priority given to CARE/FERA customers. Applicants not selected will be added to a waitlist for the next round of funding.

Who Should Apply

You may be a good fit if you:

- Rent your home (apartment or house)
- Want better comfort in specific rooms
- Have inconsistent heating and cooling across rooms
- Want more efficient room heating and cooling
- Have experienced power outages

Apply Online

Visit [URL] to check eligibility and apply.
Applications must be submitted by April 5, 2026.

Portable Battery



Portable Heat Pump



 POWER AUTHORITY
YOUR CLEAN ENERGY CHOICE

For more information, visit ocpower.org

f in @



PUBLIC OUTREACH

- SB 253 Large Company Reporting Requirements flyer
- February newsletter



Carbon Emissions Reporting for Large Companies Operating in California

Large corporations operating in California will soon be required to report their full carbon footprint, including emissions from purchased electricity (Climate Corporate Data Accountability Act – SB 253).

OCPA Customers Benefit from Simplified Compliance

Orange County Power Authority (OCPA) is a local, not-for-profit renewable energy provider that was founded to provide clean energy at stable rates to help reduce carbon emissions. OCPA offers an emission-free, 100% Renewable Choice energy plan that allows companies to report zero emissions from their OCPA electricity accounts. A 100% renewable energy plan is currently not available to Southern California Edison (SCE) commercial customers.

OCPA can work with customers directly, or with third-party compliance companies (with permission) to provide timely letters of verification for a company's kWh usage and associated emissions on the 100% Renewable Choice plan.

Easy Opt-Up Options for OCPA Customers

OCPA customers not on the 100% Renewable Choice plan can request a switch anytime. Within approximately one month, the electricity-related emissions from OCPA become zero. This significantly reduces the complexity of carbon accounting.

Call 866-262-7663 or info@ocpower.org to opt-up to 100% Renewable Choice today!

How to Become an OCPA Customer

Companies located within the member cities of Buena Park, Fullerton and Irvine, that currently receive service from SCE, but are interested in 100% renewable energy, can begin the process of re-enrolling with OCPA by contacting ocpower.org at info@ocpower.org. SCE requires anywhere from six months to a one-year waiting period to return to OCPA.

If your company is not located in a current OCPA member city and you would like the option of renewable energy through OCPA, contact your city council and let them know.

For more information, visit ocpower.org

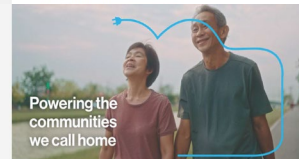


Living Our Mission: Locking in 2026 Rates

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:



Powering the communities we call home

Watch our new video »

From our everyday commutes to our favorite activities and beyond, energy powers it all – and OCPA is powering the communities we call home.



"Picturing a Better Tomorrow" Art Contest Deadline February 18

Spread the word! Our "Picturing a Better Tomorrow" art contest is coming to a close on February 18, 2025 at 5 p.m. We're inviting TK-6 students from across Buena Park, Fullerton, Fountain Valley and Irvine to artistically illustrate ways we can protect our planet, reduce reliance on fossil fuels and embrace renewable energy for a cleaner tomorrow.



PUBLIC OUTREACH

- Hosted the second annual “Picturing a Better Tomorrow” Art Contest for TK-6 Grade students to share their hopes and visions for a cleaner, greener future for our community





COMMUNITY OUTREACH

- Hosted Community Leaders Luncheon to share benefits of community clean energy and opportunities for partnerships



**ORANGE COUNTY
POWER AUTHORITY**
YOUR CLEAN ENERGY CHOICE

COMMUNITY LEADERS LUNCHEON

On behalf of Orange County Power Authority CEO Joe Mosca, you are warmly invited to a Community Leaders Luncheon hosted by the Orange County Power Authority (OCPA), Orange County's local, not-for-profit clean energy provider serving more than 177,000 residential and commercial customers in Buena Park, Irvine, and Fullerton, with Fountain Valley coming soon. Since 2022, OCPA customers have helped reduce over 2 billion pounds of carbon emissions by choosing renewable energy.

This special briefing will share how you can:

- Improve air quality and protect public health
- Protect our environment for future generations
- Help small businesses become more energy-efficient
- Bring practical sustainability resources back to their members
- Be part of long-term solutions that strengthen our communities
- Learn about and participate in grant and funding opportunities

DATE: Tuesday, February 24, 2026
TIME: 11:45 am – 1 pm
LOCATION: Melizhou Dongpo Restaurant
15383 Culver Drive, Irvine, CA 92604

Please RSVP by February 13 to:
Suzanne Choi - suzanna@tashirochoi.com

[f](#) [in](#) [@](#) [v](#)

Learn more about OCPA: ocpower.org



COMMUNITY LEADERS LUNCHEON

**ORANGE COUNTY
POWER AUTHORITY**
YOUR CLEAN ENERGY CHOICE



COMMUNITY OUTREACH

- Environmental Roundtable





COMMUNITY OUTREACH

- Staffers Luncheon





- # Survey Data Dashboard
- Explore what matters most to the people and businesses we serve.
- Use the arrow at the bottom – or the 1 and 2 on the side – to switch between Residential and Commercial. Check the boxes next to filters to remove a dataset from the results, or click ONLY next to a specific dataset to choose just that data to view.
- To review the document in [한국어](#), [español](#), [Tiếng Việt](#), [العربية](#), [Tagalog](#), [日本語](#), visit [this link](#).
- 1

2

Residential

☒ GCH Member Jurisdiction

☒ Age

☒ Annual Household Income

☒ Race/Ethnicity

☒ Housing Type

☒ Bureau Park

☒ Fountain Valley

☒ Fullerton

☒ Irvine

☒ Other

☒ <10

☒ 10-34

☒ 35-44

☒ 45-64

☒ 65+

☐ Prefer not to answer

☒ \$0-\$24,999

☒ \$25,000-\$49,999

☒ \$50,000-\$74,999

☒ \$75,000-\$99,999

☒ \$100,000-\$149,999

☒ \$150,000-\$199,999

☒ \$200,000+

☐ Prefer not to answer

☒ American Indian or Alaska Native

☒ Asian or Asian Indian

☒ Black or African American

☒ Hispanic/Latino

☒ Middle Eastern or North African

☒ Native Hawaiian or Other Pacific Islander

☒ White

☒ Other

☐ Prefer not to answer

☒ Single-family home

☒ Multi-family home

☒ Manufactured home

☒ Other

☒ Row

☒ Town

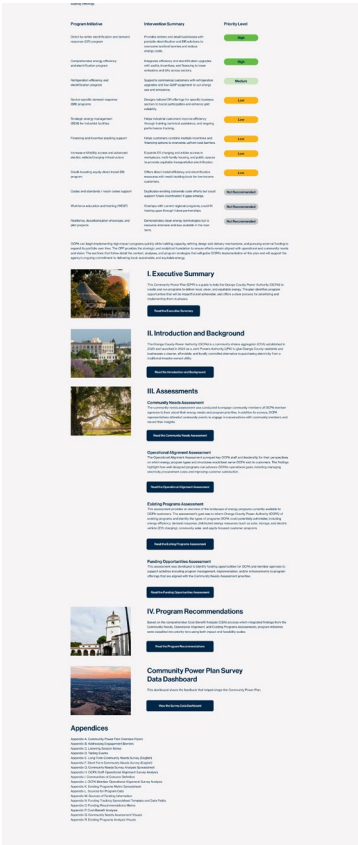
☒ Condo

☐ Prefer not to answer

POWER AUTHORITY
OF THE CITY OF IRVINE

Respondents
1,390

Clear All Filters
- Have you made any of the following energy improvements to your home?
- Respondents could select multiple options
- | | |
|---|-----|
| Installed energy-efficient technologies or appliances | 85% |
| I have not made any energy improvements | 15% |
| Installed charging for electric vehicle or another stored driving on electric vehicle | 36% |
| Installed solar panels and/or battery storage | 18% |
| Completed an energy audit | 10% |
| Other | 6% |
- Are you aware of any of the following types of local programs that may be available to you?
- Respondents could select multiple options
- | | |
|---|-----|
| Energy efficiency incentives | 43% |
| Electric vehicle and/or charging incentives | 42% |
| I am not aware of any local programs | 11% |
| Solar rebates and/or loans | 34% |





DIGITAL COMMUNICATIONS

- Filmed customer testimonial series, scheduled to come out early April, featuring:
 - A green business leader
 - A residential homeowner, family of four
 - A renter and small business owner





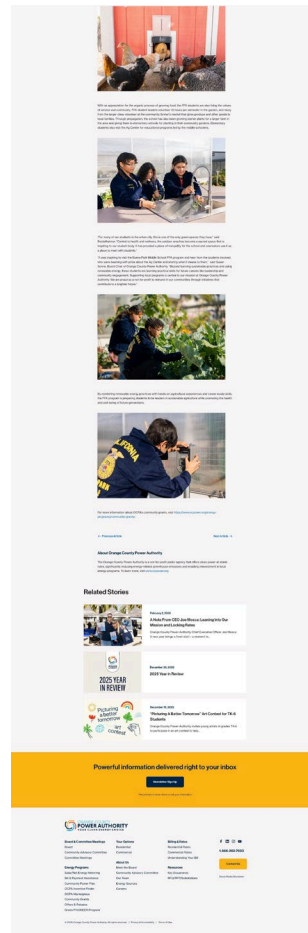
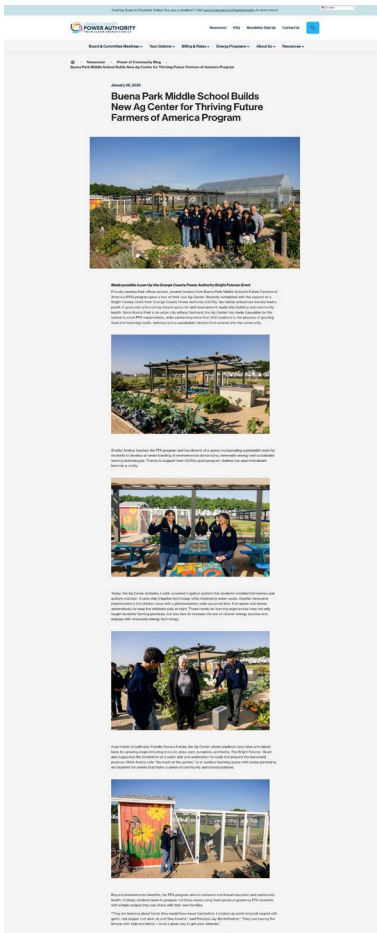
DIGITAL COMMUNICATIONS

- Photographed community members for ownable stock photography





- Toured the Buena Park Middle School's Future Farmers of America program, which received a Bright Futures Grant and published blog and social media post





RECOGNITION

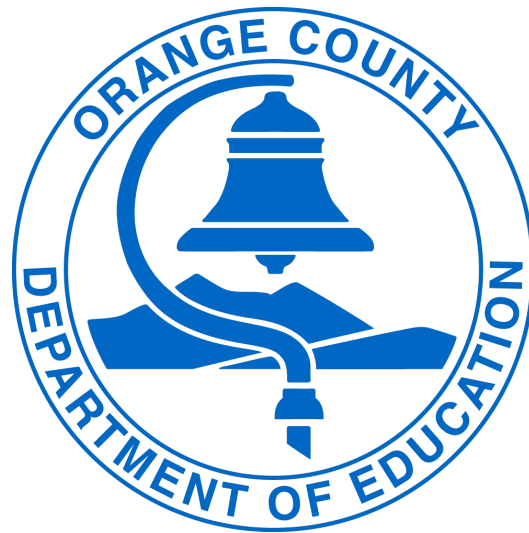
- Top 10 Green Power Sales in the U.S, by the National Laboratory of the Rockies





EDUCATIONAL TOOLS

- Collaboration is currently underway with the Orange County Department of Education to develop a renewable energy curriculum for grades 4-12 that includes four lessons built on the Next Generation Science Education Standards. Topics being considered include:
 - Universal lesson on energy, climate and community decisions
 - 4th grade lesson on renewable energy
 - 6th grade middle school lesson on environmental impact
 - High school lesson on siting a battery storage facility





COMING SOON

Public Outreach

- Celebrating Earth Month!
- April newsletter
- Art contest winner announcements and lobby update

Community Outreach

- CicloIrvine
- Fountain Valley Summerfest
- Buena Park LumiPalooza Energy Fair
- US Green Business Council Materials and Resources Trailer

Digital Communications

- OCPA Unplugged season 3
- Level Up campaign to encourage businesses to increase renewable energy plan
- Meet the Team series
- Development of landing page for income qualified and bill assistance programs
- Website remediation for ADA compliance

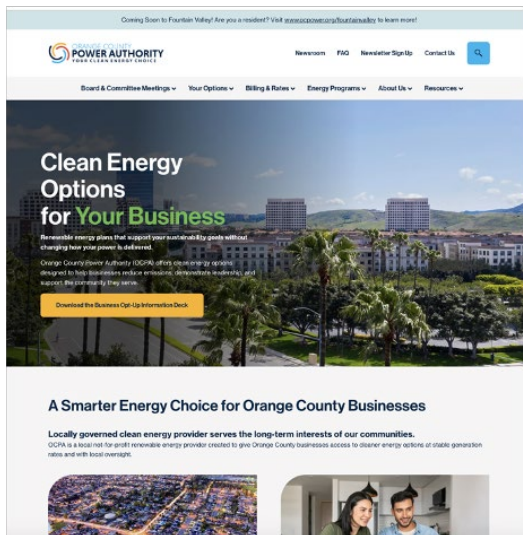




PUBLIC OUTREACH

NEW Irvine Commercial Customer Opt Up Campaign

- Objective: Education
- Targeting: Irvine



Landing Page



Flyer



Pitch Deck



Social Content

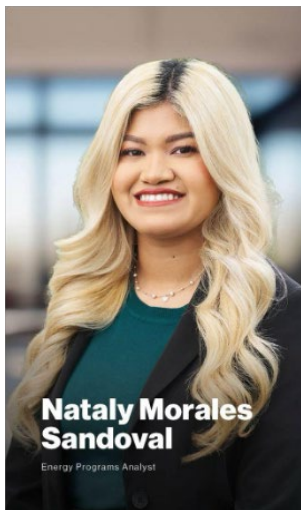


PUBLIC OUTREACH

NEW Meet the Team Video

- Objective: Education / Informational
- Targeting: Cities of Buena Park, Irvine, Fullerton and Fountain Valley

Planning in progress





Questions?



Recommended Action

Receive and file.

ORANGE COUNTY POWER AUTHORITY
Staff Report – Item 7.5

To: Orange County Power Authority Board of Directors

From: Joe Mosca, Chief Executive Officer

Subject: RISK OVERSIGHT COMMITTEE UPDATE

Date: April 13, 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: Promote transparency

RECOMMENDED ACTION

Receive and file.

BACKGROUND

The Risk Oversight Committee (ROC) was established via the Board-adopted Energy Risk Management Policy (Policy No. 11). Per the policy, members of the ROC will be selected by the Chief Executive Officer (CEO), who will serve as the Chair of the ROC. The ROC comprises the CEO, CFO, Director of Power Resources, Pacific Energy Advisors (PEA) representatives, and transactional counsel from the Authority's contracted law firm.

The ROC has the authority to:

- Meet at least once per quarter or as otherwise called to order by the ROC's Chair.
- No less than once per quarter, report to the Board regarding its meetings, deliberations, and other areas of concern.
- From time to time, adopt and/or adapt risk management guidelines defining internal controls, strategies, and processes for managing market risks incurred through our attendant upon wholesale trading, retail marketing, long-term contracting, CRR trading, and load and generation scheduling.

- Specify the permitted transaction categories and set risk limits for wholesale trading. The ROC will receive and review information and reports regarding risk management, wholesale trading transactions, and the administration of supply contracts.
- Have direct responsibility for enforcing compliance with this Policy. Any material violations of this Policy, as determined by the ROC, shall be reported to the Board for appropriate action.

The State Auditor recommended that the Board consider amending the Energy Risk Management Policy (Policy No. 11) to alter the membership of the ROC to include a limited subset of Board members in a manner that does not violate open meeting requirements of the Brown Act. Following review and discussion with the General Counsel, it was determined that formally adding Board members to the ROC through an amendment to the Energy Risk Management Policy would make the ROC meetings subject to the Brown Act, which is incompatible with the ROC's responsibilities for reviewing and analyzing market-sensitive information and prospective transactions, substantial aspects of which are confidential under CPUC rules and best practices for CCAs. As an alternative, the CEO has initiated a practice of inviting the Board Chair and Vice Chair to ROC meetings to observe. This is intended to provide additional Board oversight of the ROC without making Board members official members of the ROC under the Energy Risk Management Policy. This practice was initiated with the April 3, 2023, meeting and will continue for future meetings.

ANALYSIS AND DISCUSSION

The Risk Oversight Committee (ROC) met on Thursday, March 26, 2026, at 3:00 PM. Attendees included Joe Mosca, CEO; Tiffany Law, CFO; Louis Ting, Director of Power Resources; PEA consultants John Dalessi and Kirby Dusel; and Glen Price of Best, Best & Krieger. Susan Sonne, Chair of the Board of Directors, and James Mai, Vice Chair of the Board of Directors, attended the ROC meeting but only observed it.

The ROC discussed the following:

- Q1 2026 Market Update
 - Energy Position Reports
 - Market Exposure and Risk
 - Long-term Contracting Update
 - Portfolio Market Valuation
 - Counterparty Credit Exposure

There are no Policy violations to report.

The current ROC quarterly meeting schedule for 2026 is:

- March 26, 2026
- June 17, 2026
- September 24, 2026
- December 15, 2026

FISCAL IMPACT

None

ATTACHMENTS

None

ORANGE COUNTY POWER AUTHORITY
Staff Report – Item 7.6

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: April 13, 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, April 6, 2026, at 6:00 p.m., the Community Advisory Committee (CAC) held its regular monthly meeting. The meeting agenda included presentations on the OCPA Clean Energy Access (DAC-GT) Program, an organizational update from the Chief Executive Officer, upcoming public engagement activities, and staff updates on communications and customer programs. The meeting provided an opportunity for CAC members to receive timely updates, ask clarifying questions, and offer feedback intended to inform Board-level decision-making and ongoing staff work.

DISCUSSION/ANALYSIS

The CAC regular meeting on April 6, 2026, included the following presentations and updates:

Overview of the OCPA Clean Energy Access (DAC-GT) Program

Staff presented an overview of the Disadvantaged Communities Green Tariff (DAC-GT) Program, for which OCPA received approval from the California Public Utilities Commission (CPUC) in February 2026 to serve as program administrator. The program is designed to expand access to renewable energy for income-qualified residential customers living in disadvantaged communities who are unable to install rooftop solar.

Under the program, eligible customers will receive 100 percent renewable energy sourced from qualifying projects, along with a 20 percent discount on their total electric bill. Participation is intended to be long-term, with automatic enrollment planned to reduce barriers to access and increase participation among customers who may face challenges navigating traditional application processes. Program capacity is initially based on a 0.53 MW allocation, with implementation efforts underway and enrollment anticipated to begin in 2026.

Staff also provided context on the definition of disadvantaged communities as established by the CPUC, which includes areas experiencing economic, environmental, and public health burdens. The program is intended to advance energy equity by delivering both cost savings and clean energy access to these communities.

OCA Updates with CEO Joe Mosca

CEO Joe Mosca provided an organizational update, highlighting recent milestones, financial initiatives, and broader energy policy considerations affecting OCPA and the state. The update included discussion of OCPA's first Renewable Energy Prepayment Bond transaction, which closed in March 2026 through the California Community Choice Financing Authority. The \$929.4 million transaction is expected to reduce long-term energy procurement costs and generate approximately \$25.3 million in savings over the initial five-year period, supporting rate stability and customer affordability.

The CEO also provided an overview of ongoing statewide energy discussions, including the continued operation of the Diablo Canyon Nuclear Power Plant, which supplies a significant portion of California's electricity and has been extended through 2030 due to grid reliability considerations. Staff noted that future policy discussions may occur regarding potential extensions and emphasized the importance of representing community choice aggregator interests in those conversations.

The presentation also addressed common areas of public confusion regarding OCPA operations, including renewable energy procurement, rate structures, and financial planning. Staff emphasized the agency's commitment to transparency and encouraged CAC members to utilize available informational resources when engaging with the public.

Public Engagement for April and May 2026

Staff presented an overview of upcoming public engagement activities for April and May 2026, highlighting continued outreach across member jurisdictions through community events, business forums, and educational initiatives. Planned activities include participation in events such as the Orange County Hispanic Chamber of Commerce Estrella Awards in Anaheim, the Irvine Earth Day event, the Fullerton North Orange County Chamber of Commerce Business Mixer, and the Love Buena Park community event. Additional engagements in May include Irvine's third annual CieloIrvine active transportation event, for which OCPA is a presenting sponsor. These activities support OCPA's goals of increasing public awareness, strengthening relationships with community stakeholders, and providing accessible education on clean energy programs and customer options.

Updates from Staff

Staff provided updates on communications, programs, and community engagement activities. Communications efforts highlighted OCPA's recent announcement of its first Renewable Energy Prepayment Bond, emphasizing its role in achieving projected energy cost savings of approximately \$25.3 million over five years and reinforcing messaging around rate stability and long-term affordability. Staff also encouraged CAC members to engage with OCPA's newsroom, newsletters, and social media platforms to amplify public awareness.

Program updates included the launch of the Renter Energy Efficiency Program in Buena Park, Fullerton, and Irvine, with the application period running from March 12, 2026, through April 5, 2026. Staff reported strong interest across all member cities, with results to be shared following application review. Additional updates included the completion of the Energy Efficiency Kit Program, which distributed over 1,400 kits with a majority reaching income-qualified customers, and the soft launch of the state-funded Equitable Building Decarbonization Direct Install program.

Staff also highlighted ongoing and upcoming educational and partnership initiatives, including development of a customer-focused webinar on electricity rates and cost management, and a partnership with the U.S. Green Building Council to deploy a mobile BuildSMART Trailer showcasing energy-efficient technologies at community events. Community engagement highlights included participation in regional events such as State of the City programs, workforce and youth engagement activities, and business and technology forums.

FISCAL IMPACT

None

ATTACHMENT(S)

None

ORANGE COUNTY POWER AUTHORITY
Staff Report – Item 8.1

To: Orange County Power Authority Board of Directors

From: Joe Mosca, Chief Executive Officer

Subject: APPROVE RESOLUTION APPOINTING ROGELIO PALACIOS AS ORANGE COUNTY POWER AUTHORITY’S SECRETARY

Date: April 13, 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)

Adopt a resolution appointing Rogelio Palacios as Secretary for the Orange County Power Authority.

BACKGROUND

Article III of the Authority’s Bylaws establishes the position of Secretary as an officer of the Authority. The Bylaws provide that the Secretary shall be appointed by the Board and shall be responsible for maintaining the minutes and official records of the Authority.

The Secretary role is critical to ensuring:

- Compliance with the Brown Act and public records requirements
- Accurate documentation of Board actions
- Continuity, transparency, and institutional knowledge transfers

Earlier this year, staff conducted an open recruitment for the role of Executive Assistant/Board Clerk and are bringing a recommendation to the Board of Directors.

DISCUSSION/ANALYSIS

Staff recommends the appointment of Rogelio Palacios, who brings more than fifteen years of experience providing trusted executive-level administrative support, records management, and operational coordination in both public-sector and complex organizational environments.

Rogelio Palacios is a highly experienced executive administrative professional formerly serving as Executive Assistant to the Northwest Division Chief at CAL FIRE / Riverside County Fire. In this role, he supported executive leadership, coordinated complex schedules, prepared official correspondence, and acted as a liaison across departments and jurisdictions.

Key qualifications and strengths include:

- Senior leadership support in high-profile, public-facing organizations
- Extensive experience preparing, maintaining, and safeguarding official records
- Strong understanding of discretion, confidentiality, and procedural accuracy
- Proven ability to manage meeting logistics, executive calendars, and documentation
- Experience working across municipalities, leadership teams, and operational units

Throughout his career—spanning public safety and large nonprofit institutions—Mr. Palacios has demonstrated a consistent ability to anticipate leadership needs, ensure operational continuity, and support decision-making bodies with professionalism and precision. Appointing Mr. Palacios as Secretary will strengthen the Authority’s governance infrastructure and ensure high standards of accuracy, accountability, and administrative excellence.

FISCAL IMPACT

There is no additional fiscal impact associated with this appointment.

ATTACHMENT(S)

Attachment A – Resolution No. 2026-XX Appointment of Rogelio Palacios to Secretary

RESOLUTION NO. 2026-XX

**A RESOLUTION OF THE BOARD OF DIRECTORS OF
ORANGE COUNTY POWER AUTHORITY APPOINTING
THE SECRETARY**

A. Orange County Power Authority (“OCPA”) is a joint powers authority established on November 20, 2020, for the purpose of implementing a community choice aggregation program under Public Utilities Code Section 366.2.0.

A. The Board of Directors of OCPA desires to appoint a Secretary to perform the various administrative and other tasks necessary to conduct the Board’s and OCPA’s affairs pursuant to OCPA’s Joint Powers Agreement and applicable law.

B. Pursuant to Section 3.10.2 of the OCPA Joint Powers Agreement, the Board shall appoint a qualified person who is not on the Board to serve as Secretary.

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF DIRECTORS OF
ORANGE COUNTY POWER AUTHORITY, AS FOLLOWS:**

1. Pursuant to Section 3.10.2 of the OCPA Joint Powers Agreement, the Board hereby appoints Rogelio Palacios to serve as Secretary. Mr. Rogelio Palacios will serve as Secretary until the earlier of: (a) the end of his employment by OCPA, (b) his resignation as Secretary, or (c) until removed or replaced as Secretary by the Board.

2. This resolution shall take effect immediately upon its adoption.

ADOPTED AND APPROVED by the Board of Directors of Orange County Power Authority on this 13th day of April 2026.

ATTEST:

Susan Sonne, Chair
Board of Directors
Orange County Power Authority

Rogelio Palacios, Secretary
Board of Directors
Orange County Power Authority

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: APPROVE FIRST AMENDMENT WITH THE ENERGY COALITION

Date: April 13, 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

Authorize the CEO to negotiate, finalize, and execute an amendment to the Professional Services Agreement with The Energy Coalition (TEC) for technical assistance, program implementation, and grant support services, extending the term one year through September 17, 2027, increasing the not-to-exceed amount for services by \$240,000 to support ongoing technical assistance and program implementation, and adding a separate authorization for TEC to administer up to \$997,000 in passthrough program costs, such as purchasing electric program equipment on behalf of OCPA and providing program incentives to OCPA customers.

BACKGROUND

Orange County Power Authority (OCPA) engaged TEC to develop a comprehensive roadmap for customer energy programs, called the Community Power Plan (CPP), and to support program development and implementation resulting from the CPP.

Staff issued a Request for Proposal (RFP) for Technical Assistance & Program Support on April 15, 2024. This invitation to submit proposals was extensively distributed to 951 potential bidders on BidNet Direct, ensuring broad reach and fairness. The RFP was publicly available on the OCPA website, promoting transparency and equal opportunity for all interested parties. OCPA posted our

responses to 72 inquiries from potential vendors, demonstrating our commitment to clear communication. By the RFP's closing date, 90 potential vendors had downloaded the document. By May 25, 2024, OCPA received six (6) proposals in response to the RFP.

Proposals were evaluated based on minimum qualifications on a pass/fail basis, followed by a scored evaluation that included: understanding of the scope of work with a proposed process, approach, and timeline; consultant expertise and experience evaluated by specific staff skills, qualifications, and experience delivering comparable services; and pricing for proposed services. After a thorough and unbiased evaluation, TEC was determined to have the strongest proposal and was presented to the OCPA Board of Directors as the recommended contractor on September 17, 2024. The Board unanimously approved TEC's recommendation, after which OCPA entered into a Professional Services Agreement with TEC on September 17, 2024, to support the development of the CPP, provide technical assistance, and assist with program implementation and grant management. The agreement established an initial term of two years through September 17, 2026, with options to extend for up to three additional one-year terms. The total not-to-exceed for the services was \$500,000.

DISCUSSION/ANALYSIS

TEC's support of the Community Power Plan development spanned 15 months and included conducting a community needs assessment, evaluating existing programs, identifying existing funding opportunities, and developing a cost-benefit analysis to guide program prioritization. OCPA presented the final CPP to the Board and received approval on February 9, 2026. Following approval, a top-priority program identified in the CPP began development with technical support from TEC.

The Board-approved Programs budget for FY25/26 included an allocation of \$650,000 for a program resulting from the CPP. OCPA determined that of the two high-priority program categories identified in the CPP, the Direct-to-Renter Electrification and Demand Response program would be the most turnkey for near-term implementation. One key consideration for this determination was TEC's experience with this program category, having developed similar renter-focused electrification programs for the City of Pomona and the City of Santa Monica. This experience has informed key elements of OCPA's program design, procurement strategy, and customer delivery, helping to reduce implementation risk and accelerate deployment timelines.

The OCPA program provides eligible customers with both a portable high-efficiency heat pump HVAC unit and a portable battery, helping renters overcome barriers to making energy upgrades and improvements in their residence. Additionally, to gather data on the program's results, OCPA is offering participating customers a 25-dollar incentive to complete a survey before product delivery and another 25-dollar incentive to complete a survey after product delivery. The data gathered from the surveys will aid in 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. Findings from this initial phase will also inform how the program should be modified for future rounds of funding.

The Board-approved budget allocation for this program allows up to 300 customers to participate. TEC is supporting OCPA through the implementation of the REEP by fulfilling the survey incentives for customers, as well as ordering the products and coordinating their delivery. The survey incentives equate to 50 dollars per participant with most participants agreeing to submit both surveys, and the equipment totals approximately \$1,430 per participant.

The proposed contract amendment for the current term increases the not-to-exceed total by \$497,000 to allow for the purchase of the program appliances for customers, as well as fulfillment of the survey incentives. This new total also supports fulfillment of the \$1,000 rebates for participants in OCPA's Residential Battery Rebate Program, for which there are an anticipated 53 participants.

This contract amendment is not compensation to TEC, it is instead \$497,000 specifically allocated as passthrough costs previously accounted for in the OCPA Board-approved budget and Community Power Plan discussions. The passthrough costs included in the increased not-to-exceed total breakdown into the following estimates:

- Renter Energy Efficiency Program equipment: \$429,000
- Survey incentives: \$15,000
- Residential Battery Rebate Program rebates: \$53,000

OCPA is also requesting to exercise one of the three one-year contract extensions with TEC. The requested extension includes a Technical Support not-to-exceed amount of \$240,000 for TEC's ongoing support for design, implementation, reporting, and coordination of programs resulting from the CPP, as well as \$500,000 to support passthrough costs for implementation of future programs, including a future continuation of the REEP.

Together, the \$500,000 in passthrough program costs and amendment increase of \$240,000 related services result in a new total not-to-exceed of \$740,000 for this one-year agreement extension. Equipment procurement, customer incentives, and related program delivery costs are administered through the contract but are not retained by TEC as profit and must be billed at costs without markups. Passthrough funds will be used directly to support customer-facing programs in accordance with Board-approved program designs.

FISCAL IMPACT

The proposed amendment and one-year extension would increase the Agreement's total not-to-exceed amount from \$500,000 to \$1,737,000, an increase of \$1,237,000. Of this increase, \$497,000 is for current-term direct program delivery costs (passthrough costs), including REEP equipment, survey incentives, and Residential Battery Rebate Program rebates; \$240,000 is for Technical Support services during the extension term; and \$500,000 is for future direct program delivery costs (passthrough costs) during the extension term, including equipment and customer incentives for Board-approved programs. These direct program delivery costs are administered through the TEC contract and are not retained by TEC as compensation. Funding is consistent with OCPA's approved FY25/26 budget and anticipated FY26/27 budget.

ATTACHMENTS

Attachment A – First Amendment with The Energy Coalition – 4.13.2026

Attachment B – Professional Services Agreement with The Energy Coalition – 9.17.2024

Attachment C – Contractor Evaluation Form – 4.13.2026

Attachment D – Equipment procurement for Renter Energy Efficiency Program

**FIRST AMENDMENT TO PROFESSIONAL SERVICES AGREEMENT BETWEEN
ORANGE COUNTY POWER AUTHORITY AND
THE ENERGY COALITION**

THIS FIRST AMENDMENT (“**Amendment**”) is entered into effective as of April 13, 2026, (“**Amendment Effective Date**”), by and between the ORANGE COUNTY POWER AUTHORITY, a California joint powers authority (“**Authority**”) and THE ENERGY COALITION, a California-based nonprofit public benefit corporation (“**Consultant**”). Authority and Consultant are sometimes individually referred to herein as the “**Party**” and collectively as the “**Parties**.”

RECITALS

A. The Parties entered into that certain Professional Services Agreement between Authority and Consultant, dated September 17, 2024 (“**Agreement**”). The Agreement included an initial term of two (2) years, from September 17, 2024, through September 17, 2026, with the option to extend the Agreement for up to three (3) one-year terms, subject to satisfactory performance and mutual agreement.

B. Pursuant to the Agreement, Consultant provides professional services related to energy programs technical assistance, program implementation, and grant management.

AGREEMENT

NOW, THEREFORE, for good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, it is agreed by and between the Parties as follows:

1. **Amendment 1 to the Agreement.** The Parties hereby agree to amend the Agreement as follows:

a. Section 1.2. Section 1.2 of the Agreement is amended to extend the Term of the Agreement by one (1) year, from September 17, 2026, to September 17, 2027.

b. Section 3.1. Section 3.1 of the Agreement is amended as follows:

Consultant shall receive compensation, including authorized reimbursements, for all Services rendered under this Agreement at the rates set forth in Exhibit B, attached hereto.

The total compensation payable to Consultant for all Services shall not exceed Seven Hundred Forty Thousand Dollars (\$740,000) without written approval of Authority’s Board of Directors or Chief Executive Officer, as

appropriate. This amount reflects an additional not-to-exceed increase of Two Hundred Forty Thousand Dollars (\$240,000) beyond the previously authorized not-to-exceed amount.

In addition to the foregoing, Consultant may administer passthrough funding in an amount not-to-exceed Nine Hundred Ninety-Seven Thousand Dollars (\$997,000) for the purchase of electric program equipment, the provision of program incentives, or implementation of future programs requiring expenditures on behalf of the Authority, subject to prior written authorization by Authority for the program budget and, where required by the Authority, specific categories of expenditures. Passthrough funding shall be used solely for eligible program costs, shall not be considered compensation for Services, and shall be reimbursed at actual cost without markup, overhead, or profit to Consultant. All passthrough expenditures shall comply with Authority's procurement policies and any applicable laws, grant requirements, or funding conditions and shall be documented and subject to Authority's review, procurement, and audit requirements. Further, Consultant shall account for passthrough funding separately from compensation for Services and shall not commingle such funds with its own funds. Any rebates, discounts, credits, or other cost recoveries associated with passthrough expenditures shall be credited to Authority. Title to all equipment purchased with passthrough funding shall vest in Authority upon purchase, unless otherwise approved in writing. Consultant shall bear the risk of loss or damage until such equipment is delivered to the intended recipient.

Extra Work may be authorized as described in this Agreement and, if authorized, shall be compensated at the rates and in the manner set forth herein, provided that total compensation does not exceed the applicable not-to-exceed amounts unless further approved in writing by Authority.

2. **Capitalized Terms.** Any capitalized terms not defined herein shall have the meanings set forth in the Agreement.
3. **Counterparts.** This Amendment may be executed in two or more counterparts, each of which shall be deemed an original, but all of which together shall constitute but one and the same instrument.
4. **Full Force.** Except as expressly set forth herein, the Agreement shall remain unmodified and in full force and effect.

SIGNATURES ON FOLLOWING PAGE

IN WITNESS WHEREOF, the Parties have executed this First Amendment to the Professional Services Agreement between Orange County Power Authority and The Energy Coalition LLC as of the date first set forth above.

**ORANGE COUNTY POWER
AUTHORITY, a California joint powers
authority**

**THE ENERGY COALITION, a
California-based nonprofit**

By :

By :

Name:

Name:

Title:

Title:

ATTEST:

Board Clerk, Board of Directors
Orange County Power Authority

APPROVED AS TO FORM:

General Counsel

ORANGE COUNTY POWER AUTHORITY
PROFESSIONAL SERVICES AGREEMENT

This Professional Services Agreement ("**Agreement**") is made and entered into on September 17th, 2024, by and between ORANGE COUNTY POWER AUTHORITY, a California joint powers authority ("**Authority**") and The Energy Coalition, a California-based nonprofit ("**Consultant**"). Authority and Consultant are sometimes individually referred to as "**Party**" and collectively as "**Parties**."

RECITALS

A. Consultant desires to perform and assume responsibility for the provision of certain professional services required by Authority on the terms and conditions set forth in this Agreement. Consultant represents that it is experienced in providing support for the Community Power Plan, technical assistance, program implementation, and grant management, is licensed in the State of California, and is familiar with the plans of Authority.

B. Authority desires to engage Consultant to render such professional services for the Community Power Plan, technical assistance, program implementation, and grant management project ("**Project**") as set forth in this Agreement.

AGREEMENT

1. Scope of Services and Term.

1.1 General Scope of Services. Consultant promises and agrees to furnish to Authority all labor and services and incidental and customary work necessary to fully and adequately supply assist the Authority the implementation services necessary for the Project ("**Services**"). The Services are more particularly described in Exhibit A attached hereto, and which are stated in the proposal to Authority. All Services shall be subject to, and performed in accordance with, this Agreement, the exhibits attached hereto, and all applicable local, state and federal laws, rules and regulations.

1.2 Term. The term of this Agreement shall be from September 17, 2024 to September 17, 2026 unless earlier terminated as provided herein; provided, however, that Authority and Consultant may agree to extend this Agreement for up to three (3) additional one-year terms. Consultant shall complete the Services within the term of this Agreement and shall meet any other established schedules and deadlines.

2. Responsibilities of Consultant.

2.1 Control and Payment of Subordinates; Independent Contractor. The Services shall be performed by Consultant or under its supervision. Authority retains Consultant on an independent contractor basis and not as an employee. Consultant retains the right to perform similar or different services for others during the term of this Agreement. Any additional personnel

performing the Services under this Agreement on behalf of Consultant shall also not be employees of Authority and shall at all times be under Consultant's exclusive direction and control. Consultant shall pay all wages, salaries, and other amounts due such personnel in connection with their performance of Services under this Agreement and as required by law. Consultant shall be responsible for all reports and obligations respecting such additional personnel, including, but not limited to: social security taxes, income tax withholding, unemployment insurance, disability insurance, and workers' compensation insurance.

2.2 Schedule of Services. Consultant shall perform the Services expeditiously, within the term of this Agreement. Consultant represents that it has the professional and technical personnel required to perform the Services in conformance with such conditions. In order to facilitate Consultant's conformance with the Schedule, Authority shall respond to Consultant's submittals in a timely manner. Upon request of Authority, Consultant shall provide a more detailed schedule of anticipated performance to meet the Schedule of Services.

2.3 Conformance to Applicable Requirements. All work prepared by Consultant shall be subject to the approval of Authority.

2.4 Substitution of Key Personnel. Consultant has represented to Authority that certain key personnel will perform and coordinate the Services under this Agreement. Should one or more of such personnel become unavailable, Consultant may substitute other personnel of at least equal competence upon written approval of Authority. In the event that Authority and Consultant cannot agree as to the substitution of key personnel, Authority shall be entitled to terminate this Agreement for cause. As discussed below, any personnel who fail or refuse to perform the Services in a manner acceptable to Authority, or who are determined by the Authority to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project, or a threat to the safety of persons or property, shall be promptly removed from the Project by the Consultant at the request of the Authority. The key personnel for performance of this Agreement are as follows:

Craig Perkins

2.5 Authority's Representative. Authority hereby designates the Chief Executive Officer, or designee, to act as its representative for the performance of this Agreement ("**Authority's Representative**"). Authority's Representative shall have the power to act on behalf of Authority for all purposes under this Agreement. Consultant shall not accept direction or orders from any person other than Authority's Representative, or designee.

2.6 Consultant's Representative. Consultant hereby designates **Craig Perkins**, or his or her designee, to act as its Representative for the performance of this Agreement ("**Consultant's Representative**"). Consultant's Representative shall have full authority to represent and act on behalf of the Consultant for all purposes under this Agreement. The Consultant's Representative shall supervise and direct the Services, using his or her best skill and attention, and shall be responsible for all means, methods, techniques, sequences and procedures and for the satisfactory coordination of all portions of the Services under this Agreement.

2.7 Coordination of Services. Consultant agrees to work closely with Authority staff in the performance of Services and shall be available to Authority's staff, consultants and other staff at all reasonable times.

2.8 Standard of Care; Performance of Employees. Consultant shall perform all Services under this Agreement in a skillful and competent manner, consistent with the standards generally recognized as being employed by professionals in the same discipline in the State of California. Consultant represents and maintains that it is skilled in the professional calling necessary to perform the Services. Consultant warrants that all employees and sub- contractors shall have sufficient skill and experience to perform the Services assigned to them. Finally, Consultant represents that it, its employees and subcontractors have all licenses, permits, qualifications and approvals of whatever nature that are legally required to perform the Services, and that such licenses and approvals shall be maintained throughout the term of this Agreement. As provided for in the indemnification provisions of this Agreement, Consultant shall perform, at its own cost and expense and without reimbursement from Authority, any services necessary to correct errors or omissions which are caused by the Consultant's failure to comply with the standard of care provided for herein. Any employee of the Consultant or its subcontractors who is determined by Authority to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project, a threat to the safety of persons or property, or any employee who fails or refuses to perform the Services in a manner acceptable to Authority, shall be promptly removed from the Project by the Consultant and shall not be re-employed to perform any of the Services or to work on the Project.

2.9 Laws and Regulations. Consultant shall keep itself fully informed of and in compliance with all local, state and federal laws, rules and regulations in any manner affecting the performance of the Project or the Services, including all Cal/OSHA requirements, and shall give all notices required by law. Consultant shall be liable for all violations of such laws and regulations in connection with Services. If the Consultant performs any work knowing it to be contrary to such laws, rules and regulations and without giving written notice to Authority, Consultant shall be solely responsible for all costs arising therefrom. Consultant shall defend, indemnify and hold Authority, its officials, directors, officers, employees and agents free and harmless, pursuant to the indemnification provisions of this Agreement, from any claim or liability arising out of any failure or alleged failure to comply with such laws, rules or regulations.

2.10 Insurance.

2.10.1 Time for Compliance. Consultant shall not commence the Services under this Agreement until it has provided evidence satisfactory to Authority that it has secured all insurance required under this section, in a form and with insurance companies acceptable to Authority. In addition, Consultant shall not allow any subcontractor to commence work on any subcontract until it has provided evidence satisfactory to Authority that the subcontractor has secured all insurance required under this section.

2.10.2 Minimum Requirements. Consultant shall, at its expense, procure and maintain for the duration of the Agreement insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the Agreement by the Consultant, its agents, representatives, employees or subcontractors. Consultant shall also require all of its subcontractors to procure and maintain the same insurance for the duration of the Agreement. Such insurance shall meet at least the following minimum levels of coverage:

(A) Minimum Scope of Insurance. Coverage shall be at least as broad as the latest version of the following: (1) *General Liability*: Insurance Services Office Commercial General Liability coverage (occurrence form CG 0001 or exact equivalent); (2) *Automobile Liability*: Insurance Services Office Business Auto Coverage (form CA 0001, code 1 (any auto) or

exact equivalent); and (3) *Workers' Compensation and Employer's Liability*: Workers' Compensation insurance as required by the State of California and Employer's Liability Insurance.

(B) Minimum Limits of Insurance. Consultant shall maintain limits no less than: (1) *General Liability*: \$1,000,000 per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with general aggregate limit is used, either the general aggregate limit shall apply separately to this Agreement/location or the general aggregate limit shall be twice the required occurrence limit; (2) *Automobile Liability*: \$1,000,000 per accident for bodily injury and property damage; and (3) *Workers' Compensation and Employer's Liability*: Workers' Compensation limits as required by the Labor Code of the State of California. Employer's Liability limits of \$1,000,000 per accident for bodily injury or disease.

2.10.3 Professional Liability. Consultant shall procure and maintain, and require its subcontractors to procure and maintain, for a period of five (5) years following completion of the Services, errors and omissions liability insurance appropriate to their profession. Such insurance shall be in an amount not less than \$2,000,000 per claim. This insurance shall be endorsed to include contractual liability applicable to this Agreement and shall be written on a policy form coverage specifically designed to protect against acts, errors or omissions of the Consultant. "Covered Professional Services" as designated in the policy must specifically include work performed under this Agreement. The policy must "pay on behalf of" the insured and must include a provision establishing the insurer's duty to defend.

2.10.4 Insurance Endorsements. The insurance policies shall contain the following provisions, or Consultant shall provide endorsements on forms supplied or approved by Authority to add the following provisions to the insurance policies:

(A) General Liability.

(i) Commercial General Liability Insurance must include coverage for (1) Bodily Injury and Property Damage; (2) Personal Injury/Advertising Injury; (3) Premises/Operations Liability; (4) Products/Completed Operations Liability; (5) Aggregate Limits that Apply per Project; (6) Explosion, Collapse and Underground (UCX) exclusion deleted; (7) Contractual Liability with respect to this Agreement; (8) Broad Form Property Damage; and (9) Independent Consultants Coverage.

(ii) The policy shall contain no endorsements or provisions limiting coverage for (1) contractual liability; (2) cross liability exclusion for claims or suits by one insured against another; or (3) contain any other exclusion contrary to the Agreement.

(iii) The policy shall give Authority, its directors, officials, officers, employees, and agents insured status using ISO endorsement forms 20 10 10 01 and 20 37 10 01, or endorsements providing the exact same coverage.

(iv) The additional insured coverage under the policy shall be "primary and non-contributory" and will not seek contribution from Authority's insurance or self-insurance and shall be at least as broad as CG 20 01 04 13, or endorsements providing the exact same coverage.

(B) Automobile Liability. The automobile liability policy shall be endorsed to state that: (1) Authority, its directors, officials, officers, employees, agents and

volunteers shall be covered as additional insureds with respect to the ownership, operation, maintenance, use, loading or unloading of any auto owned, leased, hired or borrowed by the Consultant or for which the Consultant is responsible; and (2) the insurance coverage shall be primary insurance as respects Authority, its directors, officials, officers, employees, agents and volunteers, or if excess, shall stand in an unbroken chain of coverage excess of the Consultant's scheduled underlying coverage. Any insurance or self-insurance maintained by Authority, its directors, officials, officers, employees, agents and volunteers shall be excess of the Consultant's insurance and shall not be called upon to contribute with it in any way.

(C) Workers' Compensation and Employers Liability Coverage.

(i) Consultant certifies that it is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and Consultant will comply with such provisions before commencing work under this Agreement.

(ii) The insurer shall agree to waive all rights of subrogation against Authority, its directors, officials, officers, employees, agents and volunteers for losses paid under the terms of the insurance policy which arise from work performed by the Consultant.

(D) All Coverages. Defense costs shall be payable in addition to the limits set forth hereunder. Requirements of specific coverage or limits contained in this section are not intended as a limitation on coverage, limits, or other requirement, or a waiver of any coverage normally provided by any insurance. It shall be a requirement under this Agreement that any available insurance proceeds broader than or in excess of the specified minimum insurance coverage requirements and/or limits set forth herein shall be available to Authority, its directors, officials, officers, employees and agents as additional insureds under said policies. Furthermore, the requirements for coverage and limits shall be (1) the minimum coverage and limits specified in this Agreement; or (2) the broader coverage and maximum limits of coverage of any Insurance policy or proceeds available to the named insured; whichever is greater.

(i) The limits of insurance required in this Agreement may be satisfied by a combination of primary and umbrella or excess insurance. Any umbrella or excess insurance shall contain or be endorsed to contain a provision that such coverage shall also apply on a primary and non-contributory basis for the benefit of Authority (if agreed to in a written contract or agreement) before Authority's own insurance or self-insurance shall be called upon to protect it as a named insured. The umbrella/excess policy shall be provided on a "following form" basis with coverage at least as broad as provided on the underlying policy(ies).

(ii) Consultant shall provide Authority at least thirty (30) days prior written notice of cancellation of any policy required by this Agreement, except that the Consultant shall provide at least ten (10) days prior written notice of cancellation of any such policy due to non-payment of premium. If any of the required coverage is cancelled or expires during the term of this Agreement, the Consultant shall deliver renewal certificate(s) including the General Liability Additional Insured Endorsement to Authority at least ten (10) days prior to the effective date of cancellation or expiration.

(iii) The retroactive date (if any) of each policy is to be no later than the effective date of this Agreement. Consultant shall maintain such coverage continuously for a period of at least three years after the completion of the work under this Agreement.

Consultant shall purchase a one (1) year extended reporting period A) if the retroactive date is advanced past the effective date of this Agreement; B) if the policy is cancelled or not renewed; or C) if the policy is replaced by another claims-made policy with a retroactive date subsequent to the effective date of this Agreement.

(iv) The foregoing requirements as to the types and limits of insurance coverage to be maintained by Consultant, and any approval of said insurance by Authority, is not intended to and shall not in any manner limit or qualify the liabilities and obligations otherwise assumed by the Consultant pursuant to this Agreement, including but not limited to, the provisions concerning indemnification.

(v) If at any time during the life of the Agreement, any policy of insurance required under this Agreement does not comply with these specifications or is canceled and not replaced, Authority has the right but not the duty to obtain the insurance it deems necessary and any premium paid by Authority will be promptly reimbursed by Consultant or Authority will withhold amounts sufficient to pay premium from Consultant payments. In the alternative, Authority may cancel this Agreement. Authority may require the Consultant to provide complete copies of all insurance policies in effect for the duration of the Project.

(vi) Neither Authority nor any of its directors, officials, officers, employees or agents shall be personally responsible for any liability arising under or by virtue of this Agreement.

2.10.5 Separation of Insureds; No Special Limitations. All insurance required by this Section shall contain standard separation of insureds provisions. In addition, such insurance shall not contain any special limitations on the scope of protection afforded to Authority, its directors, officials, officers, employees, agents and volunteers.

2.10.6 Deductibles and Self-Insurance Retentions. Any deductibles or self-insured retentions must be declared to and approved by Authority. Consultant shall guarantee that, at the option of Authority, either: (1) the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects Authority, its directors, officials, officers, employees, agents and volunteers; or (2) the Consultant shall procure a bond guaranteeing payment of losses and related investigation costs, claims and administrative and defense expenses.

2.10.7 Acceptability of Insurers. Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, licensed to do business in California, and satisfactory to Authority.

2.10.8 Verification of Coverage. Consultant shall furnish Authority with original certificates of insurance and endorsements effecting coverage required by this Agreement on forms satisfactory to Authority. The certificates and endorsements for each insurance policy shall be signed by a person authorized by that insurer to bind coverage on its behalf and shall be on forms provided by Authority if requested. All certificates and endorsements must be received and approved by Authority before work commences. Authority reserves the right to require complete, certified copies of all required insurance policies, at any time.

2.10.9 Subcontractor Insurance Requirements. Consultant shall not allow any subcontractors to commence work on any subcontract until they have provided evidence satisfactory to Authority that they have secured all insurance required under this section. Policies of commercial general liability insurance provided by such subcontractors shall be endorsed to

name Authority as an additional insured using ISO form CG 20 38 04 13 or an endorsement providing the exact same coverage. If requested by Consultant, Authority may approve different scopes or minimum limits of insurance for particular subcontractors.

2.10.10 Safety. Consultant shall execute and maintain its work so as to avoid injury or damage to any person or property. In carrying out its Services, the Consultant shall at all times be in compliance with all applicable local, state and federal laws, rules and regulations, and shall exercise all necessary precautions for the safety of employees appropriate to the nature of the work and the conditions under which the work is to be performed. Safety precautions as applicable shall include, but shall not be limited to: (A) adequate life protection and life-saving equipment and procedures; (B) instructions in accident prevention for all employees and subcontractors, such as safe walkways, scaffolds, fall protection ladders, bridges, gang planks, confined space procedures, trenching and shoring, equipment and other safety devices, equipment and wearing apparel as are necessary or lawfully required to prevent accidents or injuries; and (C) adequate facilities for the proper inspection and maintenance of all safety measures.

3. **Fees and Payments.**

3.1 Compensation. Consultant shall receive compensation, including authorized reimbursements, for all Services rendered under this Agreement at the rates set forth in Exhibit B, attached hereto. The total compensation shall not exceed \$500,000 without written approval of Authority's Board of Directors or Chief Executive Officer, as appropriate. Extra Work may be authorized, as described below, and, if authorized, said Extra Work will be compensated at the rates and manner set forth in this Agreement.

3.2 Payment of Compensation. Consultant shall submit to Authority a monthly itemized statement which indicates work completed and hours of Services rendered by Consultant. The statement shall describe the amount of Services and supplies provided since the initial commencement date, or since the start of the subsequent billing periods, as appropriate, through the date of the statement. Authority shall, within 45 days of receiving such statement, review the statement and pay all approved charges thereon.

3.3 Reimbursement for Expenses. Consultant shall not be reimbursed for any expenses unless authorized in writing by Authority.

3.4 Extra Work. At any time during the term of this Agreement, Authority may request that Consultant perform Extra Work. As used herein, "**Extra Work**" means any work which is determined by Authority to be necessary for the proper completion of the Project, but which the Parties did not reasonably anticipate would be necessary at the execution of this Agreement. Consultant shall not perform, nor be compensated for, Extra Work without written authorization from Authority's Representative.

4. **Accounting Records**. Consultant shall maintain complete and accurate records with respect to all costs and expenses incurred under this Agreement. All such records shall be clearly identifiable. Consultant shall allow a representative of Authority during normal business hours to examine, audit, and make transcripts or copies of such records and any other documents created pursuant to this Agreement. Consultant shall allow inspection of all work, data, documents, proceedings, and activities related to the Agreement for a period of three (3) years from the date of final payment under this Agreement.

5. **General Provisions.**

5.1 Termination of Agreement.

5.1.1 Grounds for Termination. Authority may, by written notice to Consultant, terminate the whole or any part of this Agreement at any time and without cause by giving written notice to Consultant of such termination, and specifying the effective date thereof, at least seven (7) days before the effective date of such termination. Upon termination, Consultant shall be compensated only for those services which have been adequately rendered to Authority, and Consultant shall be entitled to no further compensation. Consultant may not terminate this Agreement except for cause.

5.1.2 Effect of Termination. If this Agreement is terminated as provided herein, Authority may require Consultant to provide all finished or unfinished Documents and Data and other information of any kind prepared by Consultant in connection with the performance of Services under this Agreement. Consultant shall be required to provide such documents and other information within fifteen (15) days of the request.

5.1.3 Additional Services. In the event this Agreement is terminated in whole or in part as provided herein, Authority may procure, upon such terms and in such manner as it may determine appropriate, services similar to those terminated.

5.2 Delivery of Notices. All notices permitted or required under this Agreement shall be given to the respective Parties at the following address, or at such other address as the respective parties may provide in writing for this purpose:

Consultant: Craig Perkins, President & Executive Director
The Energy Coalition
525 Technology Dr., Ste 350
Irvine, CA 92618

Authority:
Attn: Joseph M. Mosca, CEO
Orange County Power Authority
15642 Sand Canyon Avenue
P.O. Box 54283
Irvine, CA 92619

Such notice shall be deemed made when personally delivered or when mailed, forty-eight (48) hours after deposit in the U.S. Mail, first class postage prepaid and addressed to the Party at its applicable address. Actual notice shall be deemed adequate notice on the date actual notice occurred, regardless of the method of service.

5.3 Ownership of Materials and Confidentiality.

5.3.1 Documents & Data; Licensing of Intellectual Property. This Agreement creates a non-exclusive and perpetual license for Authority to copy, use, modify, reuse, or sublicense any and all copyrights, designs, and other intellectual property embodied in plans, specifications, studies, drawings, estimates, and other documents or works of authorship fixed in

any tangible medium of expression, including but not limited to, physical drawings or data magnetically or otherwise recorded on computer diskettes, which are prepared or caused to be prepared by Consultant under this Agreement ("**Documents & Data**"). Consultant shall require all subcontractors to agree in writing that Authority is granted a non-exclusive and perpetual license for any Documents & Data the subcontractor prepares under this Agreement. Consultant represents and warrants that Consultant has the legal right to license any and all Documents & Data. Consultant makes no such representation and warranty in regard to Documents & Data which were prepared by design professionals other than Consultant or provided to Consultant by Authority. Authority shall not be limited in any way in its use of the Documents & Data at any time, provided that any such use not within the purposes intended by this Agreement shall be at Authority's sole risk.

5.3.2 Intellectual Property. In addition, Authority shall have and retain all right, title and interest (including copyright, patent, trade secret and other proprietary rights) in all plans, specifications, studies, drawings, estimates, materials, data, computer programs or software and source code, enhancements, documents, and any and all works of authorship fixed in any tangible medium or expression, including but not limited to, physical drawings or other data magnetically or otherwise recorded on computer media ("**Intellectual Property**") prepared or developed by or on behalf of Consultant under this Agreement as well as any other such Intellectual Property prepared or developed by or on behalf of Consultant under this Agreement.

Authority shall have and retain all right, title and interest in Intellectual Property developed or modified under this Agreement whether or not paid for wholly or in part by Authority, whether or not developed in conjunction with Consultant, and whether or not developed by Consultant. Consultant will execute separate written assignments of any and all rights to the above referenced Intellectual Property upon request of Authority.

Consultant shall also be responsible to obtain in writing separate written assignments from any subcontractors or agents of Consultant of any and all right to the above referenced Intellectual Property. Should Consultant, either during or following termination of this Agreement, desire to use any of the above-referenced Intellectual Property, it shall first obtain the written approval of the Authority.

All materials and documents which were developed or prepared by the Consultant for general use prior to the execution of this Agreement and which are not the copyright of any other party or publicly available and any other computer applications, shall continue to be the property of the Consultant. However, unless otherwise identified and stated prior to execution of this Agreement, Consultant represents and warrants that it has the right to grant the exclusive and perpetual license for all such Intellectual Property as provided herein.

Authority further is granted by Consultant a non-exclusive and perpetual license to copy, use, modify or sub-license any and all Intellectual Property otherwise owned by Consultant which is the basis or foundation for any derivative, collective, insurrectional, or supplemental work created under this Agreement.

5.3.3 Confidentiality. All ideas, memoranda, specifications, plans, procedures, drawings, descriptions, computer program data, input record data, written information, and other Documents and Data either created by or provided to Consultant in connection with the performance of this Agreement shall be held confidential by Consultant. Such materials shall not, without the prior written consent of Authority, be used by Consultant for any purposes other than the performance of the Services. Nor shall such materials be disclosed to any person or entity not connected with the performance of the Services or the Project. Nothing furnished to Consultant which is otherwise known to Consultant or is generally known, or has become known, to the

related industry shall be deemed confidential. Consultant shall not use Authority's name or insignia, photographs of the Project, or any publicity pertaining to the Services or the Project in any magazine, trade paper, newspaper, television or radio production or other similar medium without the prior written consent of Authority.

5.3.4 Infringement Indemnification. Consultant shall defend, indemnify and hold Authority, its directors, officials, officers, employees, volunteers and agents free and harmless, pursuant to the indemnification provisions of this Agreement, for any alleged infringement of any patent, copyright, trade secret, trade name, trademark, or any other proprietary right of any person or entity in consequence of the use on the Project by Authority of the Documents & Data, including any method, process, product, or concept specified or depicted.

5.4 Cooperation; Further Acts. The Parties shall fully cooperate with one another and shall take any additional acts or sign any additional documents as may be necessary, appropriate or convenient to attain the purposes of this Agreement.

5.5 Attorney's Fees. If either Party commences an action against the other Party, either legal, administrative or otherwise, arising out of or in connection with this Agreement, the prevailing party in such litigation shall be entitled to have and recover from the losing party reasonable attorney's fees and all other costs of such action.

5.6 Indemnification.

5.6.1 To the fullest extent permitted by law, Consultant shall defend (with counsel of Authority's choosing), indemnify and hold the Authority, its officials, officers, employees, volunteers, and agents free and harmless from any and all claims, demands, causes of action, costs, expenses, liability, loss, damage or injury of any kind, in law or equity, to property or persons, including wrongful death, in any manner arising out of, pertaining to, or incident to any acts, errors or omissions, or willful misconduct of Consultant, its officials, officers, employees, subcontractors, consultants or agents in connection with the performance of the Consultant's services, the Project or this Agreement, including without limitation the payment of all damages, expert witness fees and attorney's fees and other related costs and expenses. Consultant shall defend, at Consultant's own cost, expense and risk, any and all such aforesaid suits, actions or other legal proceedings of every kind that may be brought or instituted against Authority, its directors, officials, officers, employees, agents or volunteers. Consultant shall pay and satisfy any judgment, award or decree that may be rendered against Authority or its directors, officials, officers, employees, agents or volunteers, in any such suit, action or other legal proceeding. Consultant shall reimburse Authority and its directors, officials, officers, consultants, employees, agents and/or volunteers, for any and all legal expenses and costs, including reasonable attorneys' fees, incurred by each of them in connection therewith or in enforcing the indemnity herein provided. Consultant's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by Consultant, the Authority, its officials, officers, employees, agents, or volunteers. This section shall survive any expiration or termination of this Agreement.

5.7 Entire Agreement. This Agreement contains the entire Agreement of the Parties with respect to the subject matter hereof, and supersedes all prior negotiations, understandings or agreements. This Agreement may only be modified by a writing signed by both Parties.

5.8 Governing Law. This Agreement shall be governed by the laws of the State of California. Venue shall be in Orange County, California.

5.9 Time of Essence. Time is of the essence for each and every provision of this Agreement.

5.10 Authority's Right to Employ Other Consultants. Authority reserves right to employ other consultants in connection with this Project.

5.11 Successors and Assigns. This Agreement shall be binding on the successors and assigns of the Parties.

5.12 Assignment or Transfer. Consultant shall not assign, hypothecate, or transfer, either directly or by operation of law, this Agreement or any interest herein without the prior written consent of Authority. Any attempt to do so shall be null and void, and any assignees, hypothecates or transferees shall acquire no right or interest by reason of such attempted assignment, hypothecation or transfer.

5.13 Construction; References; Captions. Since the Parties or their agents have participated fully in the preparation of this Agreement, the language of this Agreement shall be construed simply, according to its fair meaning, and not strictly for or against any Party. Any term referencing time, days or period for performance shall be deemed calendar days and not work days. All references to Consultant include all personnel, employees, agents, and subcontractors of Consultant, except as otherwise specified in this Agreement. All references to Authority include its elected officials, officers, employees, agents, and volunteers except as otherwise specified in this Agreement. The captions of the various articles and paragraphs are for convenience and ease of reference only, and do not define, limit, augment, or describe the scope, content, or intent of this Agreement.

5.14 Amendment; Modification. No supplement, modification, or amendment of this Agreement shall be binding unless executed in writing and signed by both Parties.

5.15 Waiver. No waiver of any default shall constitute a waiver of any other default or breach, whether of the same or other covenant or condition. No waiver, benefit, privilege, or service voluntarily given or performed by a Party shall give the other Party any contractual rights by custom, estoppel, or otherwise.

5.16 No Third Party Beneficiaries. There are no intended third party beneficiaries of any right or obligation assumed by the Parties.

5.17 Invalidity; Severability. If any portion of this Agreement is declared invalid, illegal, or otherwise unenforceable by a court of competent jurisdiction, the remaining provisions shall continue in full force and effect.

5.18 Prohibited Interests. Consultant maintains and warrants that it has not employed nor retained any company or person, other than a bona fide employee working solely for Consultant, to solicit or secure this Agreement. Further, Consultant warrants that it has not paid nor has it agreed to pay any company or person, other than a bona fide employee working solely for Consultant, any fee, commission, percentage, brokerage fee, gift or other consideration contingent upon or resulting from the award or making of this Agreement. For breach or violation of this warranty, Authority shall have the right to rescind this Agreement without liability. For the term of this Agreement, no member, officer or employee of Authority, during the term of his or her service with Authority, shall have any direct interest in this Agreement, or obtain any present or anticipated material benefit arising therefrom.

5.19 Equal Opportunity Employment and Subcontracting. Consultant represents that it is an equal opportunity employer and it shall not discriminate on the basis of race, gender, gender expression, gender identity, religion, national origin, ethnicity, sexual orientation, age, or disability in the solicitation, selection, hiring, or treatment of applicants, employees, subcontractors, vendors, or suppliers. Such non-discrimination shall include, but not be limited to, all activities

related to initial employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff or termination. Further, Consultant shall provide equal opportunity for subcontractors to participate in subcontracting opportunities.

5.20 Labor Certification. By its signature hereunder, Consultant certifies that it is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for Workers' Compensation, or to undertake self- insurance in accordance with the provisions of that Code, and agrees to comply with such provisions before commencing the performance of the Services.

5.21 Authority to Enter Agreement. Consultant has all requisite power and authority to conduct its business and to execute, deliver, and perform the Agreement. Each Party warrants that the individuals who have signed this Agreement have the legal power, right, and authority to make this Agreement and bind each respective Party.

5.22 Counterparts. This Agreement may be signed in counterparts, each of which shall constitute an original.

5.23 Subcontracting. Consultant shall not subcontract any portion of the work required by this Agreement, except as expressly stated herein, without prior written approval of Authority. Subcontracts, if any, shall contain a provision making them subject to all provisions stipulated in this Agreement.

[SIGNATURES ON FOLLOWING PAGE]

IN WITNESS WHEREOF, the Parties have made and executed this Agreement as of the date first written above.

**ORANGE COUNTY POWER AUTHORITY, a
California joint powers authority**

**THE ENERGY COALITION, a California-based
nonprofit**

By : Joseph M. Mosca
Name: Joseph M. Mosca
Title: Chief Executive Officer

By : Craig Perkins
Name: Craig Perkins
Title: Executive Director

ATTEST:

Pat Jacquez-Nares
Secretary Authority Board of Directors

APPROVED AS TO FORM:

William J. [Signature]
General Counsel

EXHIBIT “A”

SCOPE OF SERVICES

This Scope of Services is intended to recruit technical assistance and program support from consultants with the experience required to develop and implement a Community Power Plan (CPP). OCPA seeks to implement energy programs to invest back into OCPA member agencies and enhance environmental performance in the Orange County region. To help develop a comprehensive CPP and transition into program implementation, OCPA is seeking technical assistance and program support which may include, but is not limited to:

DEVELOPMENT OF A COMMUNITY POWER PLAN

One of the stated goals within the JPA establishing OCPA was to “provide a range of energy products and program options, available to all Parties and customers, that best serve their needs, their local communities, and support regional sustainability efforts.” As such, one of the primary reasons that member agencies elected to join OCPA was the expectation that the organization would develop and offer innovative programs as a means of both investing back into local communities and enhancing environmental performance in the Orange County region by helping our communities achieve their climate action goals.

The primary goal of the CPP is to take that broad expectation and refine it into both an overall community investment strategy based on a community needs assessment and a series of program offerings. The Community Power Plan will help OCPA:

- Address climate change by reducing energy-related greenhouse gas emissions;
- Conduct a Community Needs Assessment through a wide range of outreach efforts such as multi-lingual surveys, meetings, workshops, etc. by partnering with member agencies, local community-based organizations, and other key stakeholders;
- Utilize industry research to establish the feasibility of various programs, including the level of effort, implementation timeline, and associated expenditures or revenues;
- Collect an understanding of grants and plans that can augment the services of incentives that will benefit the community and businesses in our member cities in areas such as building decarbonization and zero emissions transportation;
- Prioritize the use and development of local, cost-effective renewable and distributed energy resources in ways that encourage and support local power development and storage;
- Produce economic benefits to the region, including local workforce development;
- Support a stable, skilled, and trained workforce; and,
- Pursue purposeful and focused investment in communities of concern and programs centered on economic, environmental, and social equity.

Under the direction of the Chief Executive Officer and in collaboration with OCPA staff and vendors, the selected proposer(s) will utilize the Community Needs Assessment to develop a

multifaceted plan that will pull together all potential programs and investments into a coherent framework that will allow for consistent analysis and calculations of costs, benefits, and measurements of effectiveness.

The selected firm will be expected to develop and provide a cost-benefit analysis that shows the impacts in the following areas:

- Customer savings (via either rate reduction, energy use reduction, or load shaping/shifting);
- Impact metrics for communities of concern;
- Economic impact (reinvestment of labor wages and customer savings back into the local economy);
- OCPA revenue impact (positive or negative);
- Overall investment impact (i.e., to what extent will an OCPA investment catalyze or complement investments to be made by others);
- Air pollutant impact;
- Incremental GHG impact; and
- Other impact metrics that may emerge during the CPP development process.

TECHNICAL ASSISTANCE

The Technical Assistance component will support collaborative and coordinated efforts with OCPA and its vendors to enhance OCPA's regulatory reporting and technical capabilities. Activities may include:

- Evaluate the energy needs of various OCPA customers or potential customers including cities, businesses, schools, and residents.
- Provide assistance to local organizations and businesses to help them support electrification and carbon-reduction goals.
- Support OCPA in the development of regulatory reporting and voluntary studies, including but not limited to power content label, energy supplier reports, new member agency CPUC implementation plans, emissions reporting, climate risk reporting, greenhouse gas reporting, and similar reports.
- Assist cities in developing climate action plans, energy programs, and grant applications and reports.
- Present technical findings to OCPA Board of Directors, member agencies, and key stakeholders upon request.

PROGRAM IMPLEMENTATION SUPPORT

Manage new and existing energy programs to augment OCPA program operations capacity.

Activities may include:

- Provide assistance for the administration of clean energy programs, including but not limited to those identified through the Community Power Plan.
- Manage day-to-day operations of OCPA energy programs when necessary.
- Under the direction of OCPA staff, coordinate engagements with key community stakeholders and organize forums to gather input from diverse stakeholders.
- Prepare administrative and operational reports on program utilization, program recipients, expenditures, emissions reductions, benefits to OCPA member agencies, and similar data points.
- Maintain records of all program information consistent with OCPA's records retention guidelines.

GRANT MANAGEMENT

Increase grant management capacity to provide more funding for CCP and energy programming in OCPA member agencies. Activities may include:

- Monitor and apply for grant funding consistent with OCPA's mission and goals on behalf of OCPA or its member agencies.
- Collaborate with OCPA and member agency staff to develop individual or collaborative grant applications.
- Manage regular contacts with funding administrators and manage reporting requirements, including progress and financial reports.

EXHIBIT “B”

COMPENSATION BILLING RATES

The Consultant will be compensated on a time and materials basis in accordance with the hourly rates set forth below in this Exhibit.

For the development of a Community Power Plan, the estimated cost is approximately \$229,447, and in no event shall exceed \$250,000 during the term of this Agreement, unless otherwise agreed to by the Parties.

For technical assistance, program implementation, and grant support services, costs shall not exceed \$20,000 during any single month, and shall not exceed \$250,000 during the term of this Agreement, unless otherwise agreed to in writing by the Parties.

Total compensation under this Agreement shall not exceed \$500,000 as set forth in Section 3.1, unless otherwise agreed to in writing by the Parties.

Estimated Budget for Community Power Plan

Development of a Community Power Plan		
Category	Total Estimated Hours	Total Estimated Cost
Staff: Planning	125	\$33,005
Staff: Existing Programs Assessment	112	\$23,020
Staff: Community Needs Assessment	164	\$33,780
Staff: Organizational Needs Assessment	136	\$26,800
Staff: Funding Opportunities Assessment	112	\$23,020
Staff: Cost-Benefit Analysis	142	\$30,040
Staff: Recommendations (Report Development)	125	\$26,425
Staff: Ongoing Coordination	86	\$19,357
Staff: Administrative and Overhead (Invoicing)	24	\$4,500
Materials and Expenses	--	\$6,200
Travel	--	\$3,300
Total		\$229,447

If the Authority requests Extra Work to be performed by the Consultant, compensation for the augmentation of staff will be paid at the rates listed below.

Annual adjustments to these hourly rates will incorporate a 5% increase, effective upon each anniversary of the Agreement effective date.

Breakout of Anticipated Roles by Position	
Position(s)	Anticipated Role
Executive, Vice President	Strategic advisement
Director, Assistant Director	Oversight, client management, regulatory reporting, grant application support
Program Manager	Scope lead, program and grant management, reporting
Program Analyst	Data analysis, Geographic Information System (GIS) support
Project Manager	Research, outreach, OCPA customer engagement and support

Technical Assistance		
Name	Position	Hourly Rate
Craig Perkins	Executive	\$355
Laurel Rothschild	Vice President	\$315
Rebecca Hausheer	Director	\$281
Meaghan Lavery	Director	\$281
Felicia Federico	Director	\$281
Julie Castro	Assistant Director	\$253
Tim Olsen	Assistant Director	\$253
Amy Whitehouse	Program Manager	\$234
Ivana Dorin	Program Manager	\$234
Code Bruder	Program Manager	\$234
Christina Vanciu	Program Analyst	\$181
Alina Bonto	Project Manager	\$181
Nenetzin Rodriguez	Project Manager	\$181
Elaina Lee	Project Manager	\$181
Orson Spence	Project Analyst	\$134
Amanda Butcher	Project Coordinator	\$103
Alex Binzen	Project Coordinator	\$103

Program Implementation Support		
Name	Position	Hourly Rate
Craig Perkins	Executive	\$355
Laurel Rothschild	Vice President	\$315
Rebecca Hausheer	Director	\$281
Meaghan Laverty	Director	\$281
Felicia Federico	Director	\$281
Julie Castro	Assistant Director	\$253
Tim Olsen	Assistant Director	\$253
Amy Whitehouse	Program Manager	\$234
Ivana Dorin	Program Manager	\$234
Code Bruder	Program Manager	\$234
Christina Vanciu	Program Analyst	\$181
Nenetzin Rodriguez	Project Manager	\$181
Elaina Lee	Project Manager	\$181

Energy Grants Management		
Name	Position	Hourly Rate
Craig Perkins	Executive	\$355
Laurel Rothschild	Vice President	\$315
Rebecca Hausheer	Director	\$281
Meaghan Lavery	Director	\$281
Julie Castro	Assistant Director	\$253
Tim Olsen	Assistant Director	\$253
Amy Whitehouse	Program Manager	\$234
Ivana Dorin	Program Manager	\$234
Code Bruder	Program Manager	\$234
Christina Vanciu	Program Analyst	\$181
Tyler Aguirre	Project Manager	\$181
Allison Hang	Project Manager	\$181
Alina Bonto	Project Manager	\$181
Nenetzin Rodriguez	Project Manager	\$181
Elaina Lee	Project Manager	\$181
Orson Spence	Project Analyst	\$134
Amanda Butcher	Project Coordinator	\$103
Alex Binzen	Project Coordinator	\$103



Contractor Performance Evaluation Form (For New Contract or Contract Amendment)

Contractor Name: The Energy Coalition (TEC)

Contract Amount: \$500,000

Contract Begin Date
(current contract term): 9/17/2024

Contract End Date
(current contract term): 9/17/2026

Evaluator - Name: Pranesh Venugopal

Evaluator - Title: Energy Programs Manager

Description of Services: Consultant will serve as technical assistance and program support to develop and implement a Community Power Plan (CPP) and transition into program implementation. OCPA is seeking technical assistance and program implementation support. Program implementation support includes administration of clean energy programs, including but not limited to those identified through the Community Power Plan, and managing day-to-day operations of OCPA energy programs.

Contractor Performance Rating Score System:

5: Outstanding; 4: Above Average; 3: Satisfactory; 2: Marginal; 1: Unsatisfactory

Please provide a score out of 5 for the following performance assessments:	Score
1. Contractor adherence to the terms of the contract	5
2. Quality of Contractor's work	4
3. Contractor personnel's knowledge of the contract requirements	4
4. Cooperation/communication with OCPA	5
5. Adherence to specified contract timelines	5
6. Ability to work within contract amount	5
7. Effectiveness of Contractor Project Manager	4
8. Accuracy and timeliness of invoices	5
Overall Score (average)	4.6
Overall Quality of Contractor's performance	Outstanding

Comments:

The Energy Coalition (TEC) is a highly-regarded consulting firm that has consistently delivered programs effectively from design through implementation for countless customers. They are incredibly detailed and comprehensive in their support, paying attention to intricate details to ensure quality and accountability. TEC works closely with OCPA to meet timelines and expectations. They also provide clear cost estimates and communicate early if there are any changes in scope or impacts to the budget. Their partnership and accountability have engendered strong trust from OCPA staff and Board members.

Would you do business with this Contractor again?

Yes

What would be the amended Contract Begin Date?

9/18/2026

What would be the amended Contract End Date?

9/17/2027

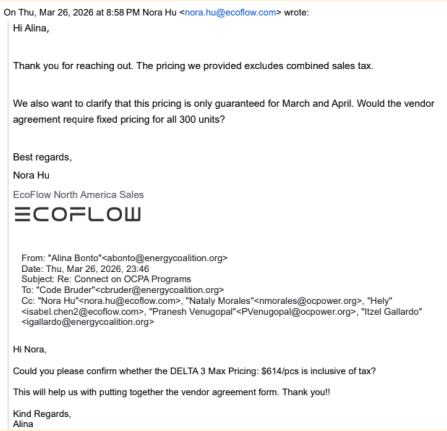
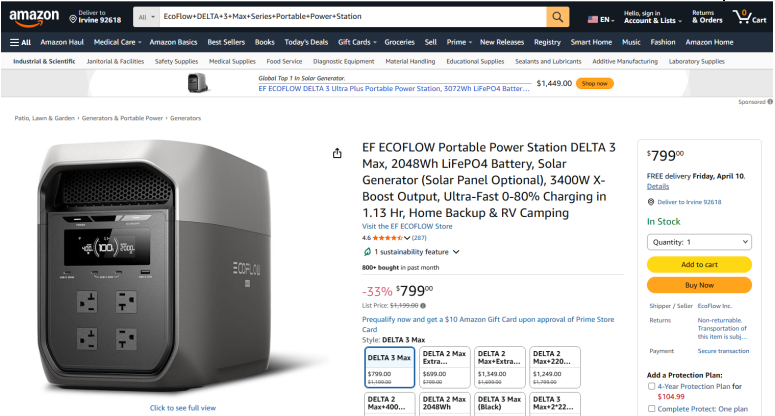
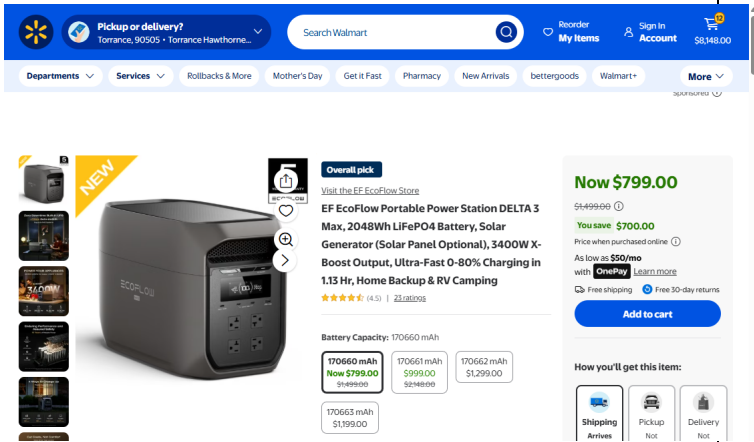
Will this new contract or contract amendment exceed \$100,000?

Yes

If yes, when will it be presented to the Board for approval?

4/13/2026

Equipment Procurement for Renter Energy Efficiency Program

Equipment	Price (excludes sales tax)	Source	Supporting Documentation	Image	Notes
EcoFlow DELTA 3 Max (Battery)	\$614.00	Nora Hu with EcoFlow North America Sales	email ; link		Bulk Pricing guaranteed for March & April
EcoFlow DELTA 3 Max (Battery)	\$799.00	Amazon	link		As of 4/7 on sale for \$799
EcoFlow DELTA 3 Max (Battery)	\$799.00	Walmart	link		4/7 on sale for \$799

ORANGE COUNTY POWER AUTHORITY
Staff Report – Item 8.3

To: Orange County Power Authority Board of Directors

From: Joe Mosca, Chief Executive Officer

Subject: APPROVE OCPA STRATEGIC PLAN FOR FISCAL YEAR 2026-27

Date: April 13, 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)

1. Approve the OCPA Strategic Plan for Fiscal Year 2026-27, as presented in Attachment A, establishing the Board’s strategic priorities and direction for the upcoming fiscal year.
2. Authorize the Chief Executive Officer to finalize the plan based on Board of Directors feedback, if applicable.

BACKGROUND

On March 18, 2026, the OCPA Board of Directors held its Annual Strategic Planning Workshop at the Portola Springs Community Center at 900 Tomato Springs in Irvine. The workshop was organized into three sessions: a review of OCPA’s current position across all major functional areas, a facilitated Board dialogue on strategic priorities, and a synthesis of Board input to guide staff in preparing the proposed plan.

Board members provided direction on priorities for the coming fiscal year. The themes that emerged most consistently included affordability as a central priority, strong support for a comprehensive product evaluation, interest in deeper legislative and regulatory engagement, and a desire for more structured Board education and involvement in community outreach.

DISCUSSION/ANALYSIS

Using the Board's direction from the workshop, staff developed the proposed Strategic Plan for FY 2026-27. The plan retains OCPA's five (5) established strategic goal areas while refining the objectives beneath them. The FY 2025-26 plan contained 27 objectives at varying levels of specificity. The proposed plan consolidates these to 13 objectives at a consistent level of strategic focus, making it easier for the Board to track progress.

The operational detail from the prior plan's objectives has not been lost—it has moved into a staff work plan that maps each strategic objective to specific tasks, responsible parties, and timelines. This new approach gives the Board a clearer strategic plan while giving staff a more actionable operational plan.

The proposed plan maintains OCPA's five established goal areas:

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

Under each goal area, objectives have been refined to reflect current Board priorities and organizational capacity.

Key Changes from FY 2025-26

The most significant changes in the proposed plan reflect the Board's workshop direction:

- Cost-of-Service and Product Evaluation Study: A new objective (2.1) formalizes the Board's unanimous support for a comprehensive study to inform product and rate structure decisions. The Board emphasized the importance of understanding best practices from other CCAs and incorporating lessons into the study.
- Legislative and Regulatory Engagement: Objectives under Goal 5 now include structured Board member engagement in advocacy, with training and tools to support effective outreach to legislators and city councils.
- Board Education and Orientation: Board members expressed a desire for ongoing learning opportunities. The plan incorporates this through regular study sessions and orientation programming.
- Objective Consolidation: From twenty-seven (27) objectives to thirteen (13) at a consistent strategic level. Operational tasks are maintained in the staff work plan and will inform quarterly Board progress reports.

Attachments Overview

The proposed Strategic Plan is supported by two attachments that are intended to provide clarity, continuity, and transparency for the Board's consideration.

- **Attachment A** presents the proposed FY 2026–27 Strategic Plan, including OCPA’s mission, vision, strategic goals, and refined strategic-level objectives. This attachment reflects the substance of what staff is requesting the Board approve today — the strategic direction and priorities for the upcoming fiscal year with a side-by-side comparison of the previous objectives.
- **Attachment B** provides a detailed status and transition summary of the FY 2025–26 Strategic Plan objectives. It is included to demonstrate continuity, accountability, and how previously adopted Board priorities have been completed, carried forward, consolidated, or operationalized in the proposed FY 2026–27 plan.
- **Attachment C** provides the most recent monthly status report for the FY 2025–26 Strategic Plan, reflecting implementation progress as of April 13, 2026. The report presents a comprehensive, objective-by-objective accounting of staff-level activities, including completion status, responsible departments, and narrative progress updates aligned with each adopted strategic goal. This attachment is included to demonstrate organizational accountability and continuity as OCPA transitions from the FY 2025–26 Strategic Plan to the proposed FY 2026–27 plan. It shows that the majority of FY 2025–26 strategic objectives have been completed or are well underway, and identifies those objectives that are being carried forward, reframed, or operationalized in the proposed plan.
- **Attachment D** presents the draft FY 2026–27 Staff Work Plan that supports implementation of the proposed Strategic Plan. The work plan translates each Board-adopted strategic objective into discrete staff-level tasks, including responsible owners, anticipated timelines, and current status, and serves as the primary internal management and accountability tool for execution.

Progress Reporting

Progress toward the adopted strategic objectives will be tracked through detailed staff work plans and reported to the Board regularly through an agenda item on the Consent Calendar. Staff will provide a monthly, high-level dashboard summarizing progress for each strategic objective, including overall status and key milestones, to support Board oversight and transparency.

Content Approval and Final Presentation

Board approval of the Strategic Plan at this time is requested for content and strategic direction only. Following Board approval, staff will finalize formatting, design, and branding elements to ensure consistency with OCPA’s visual identity and communication standards prior to public distribution and posting on the agency website. No substantive changes to the approved content will be made without returning to the Board.

FISCAL IMPACT

The strategic plan itself does not authorize specific expenditures. Individual initiatives with fiscal impact will be brought to the Board through the normal budget process.

ATTACHMENT(S)

Attachment A – Proposed OCPA Strategic Plan for Fiscal Year 2026-27

Attachment B – FY 2025–26 Strategic Plan Objectives — Status and Transition to FY 2026–27

Attachment C – FY 2025–26 Strategic Plan Monthly Status Report as of 4.13.2026

Attachment D – OCPA Strategic Plan 2026-27 Staff Work Plan

OCPA Strategic Plan

2026-2027

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Mission & Vision

Mission

Provide renewable energy at competitive rates and equitably reinvest to support sustainable communities.

Vision

Our vision is to think globally and act locally by empowering our communities with choice, transforming the energy landscape, driving a sustainable future, and ensuring that no community is left behind in this transition to renewable energy.

Board of Directors

Name	Role	City
Susan Sonne	Board Chair	Buena Park
James Mai	Vice Chair	Irvine
Fred Jung	Board Member	Fullerton
Glenn Grandis	Board Member	Fountain Valley
Kathleen Treseder	Board Member	Irvine

Alternate Board Members

Name	City
Lamiya Hoque	Buena Park
Shana Charles	Fullerton
William Go	Irvine
Betty Martinez Franco	Irvine
Ted Bui	Fountain Valley

CEO Message

As we enter the 2026–2027 planning year, the energy landscape continues to evolve at an unprecedented pace. Volatile power markets, increasing regulatory complexity, shifting state and federal policy, climate-driven system stress, and global geopolitical forces all shape the cost and availability of electricity in California. In this environment, certainty is hard to come by—but disciplined planning, strong governance, and local control matter more than ever.

Community Choice Aggregation was created for moments like this. CCAs are uniquely positioned to be nimble, responsive, and accountable to the communities they serve. At the Orange County Power Authority (OCPA), our not-for-profit structure allows us to prioritize customer value, affordability, and long-term stability over short-term market reactions. We exist to deliver reliable, clean energy at competitive rates while reinvesting locally and equitably in the communities we serve.

This Strategic Plan reflects OCPA’s continued maturation as a public power provider. As our organization grows, so too must the rigor of our planning. For the 2026–2027 cycle, we intentionally refined this plan from approximately 27 strategic-level objectives to 13 clearer, higher-impact objectives, supported by more specific staff-level tasks beneath them. This shift improves focus, accountability, and transparency—ensuring that our Board sets direction at the right altitude while staff execution is grounded in measurable, operational actions.

At its core, this plan is designed to deliver a high level of value and rate certainty for our customers. Through disciplined cost-of-service analysis, prudent procurement strategies, and strong financial and risk management practices, OCPA is focused on navigating uncertainty without losing sight of affordability. We are committed to thoughtful rate design, responsible reserve management, and long-term planning that protects customers from unnecessary volatility while maintaining flexibility in a rapidly changing market.

Our strategic priorities remain consistent and community-centered:

Enriching and Growing the OCPA Community by building trusted partnerships, engaging residents and local leaders, and pursuing responsible growth that strengthens our collective buying power and long-term stability.

Prioritizing Fiscal Sustainability and Affordability by aligning rates with true costs, strengthening financial resilience, and positioning OCPA for future credit readiness—always with customer impacts at the forefront of decision-making.

Designing and Deploying Community-Aligned Customer Programs that reflect the diverse needs of our communities, with a strong emphasis on equity, accessibility, and measurable outcomes for underserved populations.

Energizing Our Community with Renewable Energy Sources through diversified, cost-effective portfolios; local and regional clean energy partnerships; and programs that advance California's clean energy goals while supporting grid reliability.

Raising Awareness of Community Energy and Advocating for Our Customers by equipping Board members and stakeholders with the tools, knowledge, and frameworks needed to engage constructively in regulatory and policy discussions that directly affect customer affordability and choice.

This plan is also a commitment to discipline. As a public agency, OCPA remains focused on spending responsibly, investing in critical services, and ensuring that every initiative advances our mission. Growth, innovation, and advocacy must always be grounded in transparency, measurable value, and the trust placed in us by our customers and member communities.

I am proud of the progress OCPA has made and confident in the direction outlined in this Strategic Plan. By staying focused, adaptable, and guided by our public purpose, we are well positioned to navigate uncertainty and continue building a cleaner, more affordable, and more resilient energy future for Orange County.

Thank you for your continued trust and partnership.

Joseph M. Mosca

Chief Executive Officer

Strategic Goals

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

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Strategic Objectives — Side-by-Side Comparison

Goal 1: Enrich & Grow the OCPA Community

OCPA engages with local leaders, community organizations, and educational institutions to help foster a deeper understanding of renewable energy and the benefits of CCAs. Staff continuously build and maintain relationships with key stakeholders to ensure ongoing support and collaboration.

2025-26 Objectives (Current)	2026-27 Objectives (Proposed)
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.	1.1 Expand awareness of OCPA through targeted outreach to prospective member cities and regional organizations • Present to 2 groups/quarter in OC region • Present to stakeholders in 2+ prospective cities annually • Develop stakeholder engagement talking points
1.2 Present OCPA to key stakeholders in at least two (2) prospective member cities to promote OCPA's mission and benefits.	1.2 Develop educational programs and partnerships promoting renewable energy understanding across age groups • Develop school partnerships and curriculum support • Launch youth ambassador/internship program • Establish curriculum for community academy program(s)
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.	
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.	

Goal 2: Prioritize Fiscal Sustainability & Affordability

OCPA maintains a robust financial strategy that ensures affordable rates and fiscal health. Staff regularly review and adjust financial plans to adapt to market changes, regulatory shifts, legislative mandates, and optimize cost-saving opportunities.

2025-26 Objectives (Current)	2026-27 Objectives (Proposed)
2.1 Ensure affordable rates for OCPA customers while covering all expenses and advancing equitable renewable energy initiatives. ▪ Maintain 2026 Basic Choice rates below SCE's equivalent generation rates to ensure competitiveness. ▪ Design OCPA's 2026 rates to fully cover operational expenses, debt obligations, and reserve contributions. ▪ Monitor SCE's 2026 generation rates and Power Charge Indifference Adjustment (PCIA) updates. ▪ Develop a comprehensive energy cost mitigation plan for FY2025/26, including scenario analysis for rate volatility and a review of existing power procurement contracts. ▪ Benchmark OCPA rates against other CCAs in the SCE service area to ensure industry competitiveness.	2.1 Deliver a financially sustainable 2027 rate and product framework grounded in cost-of-service analysis, product pathway evaluation, and disciplined cost management • Launch cost-of-service and product pathway workplan, including consultant management, kickoff, data request, and internal coordination • Evaluate feasible product pathways and provide procurement, compliance, cost, and portfolio inputs to support COS and rate design • Integrate product pathway analysis into the COS study and rate design framework • Complete draft COS model, revenue requirement analysis, and initial Board briefing • Develop rate design scenarios and evaluate financial, affordability, and competitiveness impacts • Refine rate design scenarios and complete customer rate impact and bill impact tools • Present preliminary procurement and portfolio findings that inform product feasibility and Board consideration • Conduct public meetings and return final rate design and product framework for Board action
2.2 Strengthen Financial Resilience and Credit Rating Preparation. ▪ Accumulate an operating reserve of 30-50% of total FY2025/26 budgetary operating expenses, prioritizing liquidity for operational flexibility. ▪ Develop a detailed roadmap for obtaining a credit rating by 2027.	2.2 Advance credit rating readiness and innovative financing strategies to position OCPA for a potential public credit rating process in 2028 • Evaluate additional prepayment and other innovative financing opportunities • Develop a credit rating readiness roadmap and complete 2027 rate and product decisions that strengthen financial sustainability • Strengthen procurement, hedging, portfolio risk management, and core financial/risk policies to support credit readiness • Maintain positive net income, monitor customer retention, strengthen member/customer stability narrative, and rebuild reserves toward Board targets

	• Prepare rating materials, conduct mock review, brief the Board, and determine whether to pursue a formal public rating process • Launch formal rating process, if approved
2.3 Explore innovative financing to optimize long-term power procurement costs and educate the board on options. ▪ Conduct a feasibility study for green prepayment bonds, assessing market conditions, OCPA's financial readiness, and alignment with power procurement goals. ▪ Host a prepay transaction workshop for the Board to evaluate green bond options, incorporating case studies of successful CCA bond issuances and a clear comparison of costs and benefits.	
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.	

Goal 3: Design & Deploy Community-Aligned Customer Programs

OCPA collaborates with member cities to identify and address energy program needs. Staff develop and implement customer programs that meet specific needs while enhancing energy efficiency and sustainability in member communities. OCPA tracks and applies for relevant state and federal funding to support local member cities while also creating local grant funding opportunities to support community initiatives.

2025-26 Objectives (Current)	2026-27 Objectives (Proposed)
3.1 Finalize the Community Needs Assessment for the Community Power Plan and present the findings and next steps.	3.1 Implement customer programs informed by the Community Power Plan, with focus on equity and underserved populations • Implement 3 new programs based on the Community Power Plan • Provided enhanced program opportunities to underserved populations • Build relationships with new CBOs representing diverse ratepayers in member cities to further OCPA messaging reach
3.2 Develop three (3) new customer programs consistent with the needs identified in the Community Needs Assessment of the OCPA Community Power Plan.	3.2 Grow grant and program participation year-over-year • Expand grant offerings with 25% YoY growth target • Measurably increase participation in long-term programs in subsequent timeframes
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.	3.3 Strengthen community outreach to provide customers with access to OCPA programs and resources • Develop a website landing page that encompasses the breadth of low-income resources available to OCPA customers • Establish a network of organizations, platforms, and contacts to support promotion of OCPA programs and resources
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.	

Goal 4: Energize Our Community with Renewable Energy Sources

OCPA invests in and develops local renewable energy projects to enhance grid sustainability. OCPA monitors and mitigates risks to ensure the stability and growth of its energy portfolio. Staff collaborate with technology partners and other CCAs to innovate and share resources.

2025-26 Objectives (Current)	2026-27 Objectives (Proposed)
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.	4.1 Maintain a diversified, cost-effective power portfolio with risk management protocols that adapt to market conditions • Establish risk matrix for hedging opportunities, determine feasibility based on Enterprise Risk Management Policy • Release the long-term power products solicitation and evaluate bi-lateral offers concurrently • Identify and release joint procurement for resources based on alignment of priorities with other CCA's • Benchmark renewable energy and GHG emissions against other LSEs and statewide metrics • Utilize Integrated Resource Plan filing as the roadmap for OCPA's renewable energy future, and GHG reduction goals to meet or surpass statewide goals
4.2 Establish precise metrics and effective tools to proficiently identify, avoid, and mitigate market and credit risks for OCPA.	4.2 Advance local generation and storage programs through partnerships with member agencies and clean technology providers • Issue CPUC-approved solicitation for the DAC-GT program per CPUC Resolution E-5435 to implement OCPA's proposed 10% discount rate for CARE and FERA customers • Outreach with customers, developers, clean tech companies, to garner strategies and pathways, including develop a RFI based on engagement outcomes
4.3 Create local partnerships with clean technology companies to advance emerging long-term energy storage and technologies.	4.3 Collaborate with other CCAs on joint procurement, shared resources, and knowledge exchange • Execute Edison Electric Institute (EEI) agreement with Clean Power Alliance for energy trading • Execute EEI agreement with Clean Energy Alliance for Prepay and other energy trading efforts • Execute EEI with Dynasty Power • Execute agreements with additional CCA partners and counterparties • Outreach to CCA counterparts, identify CCA practices, and benchmarking relevant metrics
4.4 Forge partnerships with other CCAs to acquire shared resources, mitigate	

development risks, and capitalize on economies of scale.	
4.5 Create a more sustainable electric grid with measurable milestones above California's renewable energy goals.	
4.6 Create partnerships with member agencies to identify local development opportunities.	
4.7 Release at least two (2) long-term solicitations for renewable energy resources.	

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Goal 5: Raise Awareness of Community Energy & Advocate for Our Customers

OCA continuously engages with the community through diverse events and educational efforts to raise awareness about OCA and the benefits of renewable and carbon-free energy. Staff foster strong relationships with elected policymakers, local businesses, and culturally representative organizations to ensure inclusive outreach. OCA monitors and participates in technical policy matters, advocating for regulatory and legislative initiatives that support OCA's mission and the well-being of its customers, placing a priority on affordability and clean energy.

2025-26 Objectives (Current)	2026-27 Objectives (Proposed)
5.1 Develop a toolkit of materials for Board member use in engaging with prospective cities about OCA.	5.1 Strengthen community engagement through culturally-inclusive events, networking, and business outreach • Sponsor or facilitate small business mixer • Continue building culturally representative outreach partnerships • Increase OCA Board member engagement in community events
5.2 Host at least two (2) independent pop-up events in member cities per quarter.	5.2 Advance regulatory and legislative advocacy to enhance affordability for our customers, protect our customers' interests, and support CCA-favorable policy outcomes • Develop stakeholder mapping document for OCA staff, board members, and community advisory committee to enable strategically targeted outreach and advocacy • Create Policy Risk Assessment Guide to analyze rulemaking and policy impacts on OCA customer affordability, OCA operations, and other areas to inform OCA regulatory priorities • Develop and update accomplishment tracker to illustrate impact of advocacy wins via promotional materials • Develop and release an Energy Policy 101 resource to improve baseline understanding of energy policy and regulatory frameworks among stakeholders • Coordinate Board member legislative visits for OCA-related priorities in Sacramento/DC
5.3 Sponsor and help facilitate a small business mixer to build community and opportunities for education about OCA and renewable energy solutions.	5.3 Equip Board members with tools, training, and structured support for effective policy engagement • Develop Board member resources for prospective city engagement • Develop study sessions for Board members and other key stakeholders (Geopolitical and global energy updates; ERRRA forecast + rates primer; summer outlook/CPUC benchmarks; PCIA; Energy costs (full stack costs and revenue model) • Enhance Board member communications on community engagement and governance-related items

5.4 Develop education curricula for elected officials and their staff; provide this training opportunity annually.	
5.5 Develop working relationships with culturally representative organizations to ensure representative and equitable outreach in the top threshold languages.	
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.	
5.7 Develop and implement a regulatory monitoring framework to ensure all departments are consistently informed about regulatory changes and their implications.	
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.	

FY 2025–26 Strategic Plan Objectives — Status and Transition to FY 2026–27

This attachment provides a side-by-side accounting of the FY 2025–26 Strategic Plan objectives, their most recent implementation status, and how each objective transitions into the proposed FY 2026–27 Strategic Plan.

The table below is intended to serve as a continuity and accountability tool—showing where work was completed, where efforts are ongoing, and how previously adopted priorities are carried forward, refined, or consolidated in the next planning cycle. No core area of work was eliminated; rather, objectives were intentionally reorganized to improve clarity and focus.

Notable Changes for the FY 2026–27 planning cycle:

- The number of strategic-level objectives was intentionally reduced from 27 to 13 to focus the Board on the most consequential policy and governance decisions.
- Detailed implementation actions were moved to staff-level tasks, which will be tracked through regular reporting.
- Related or overlapping objectives were combined or relocated to align responsibility with the appropriate functional area and reduce duplication.

This refinement allows OCPA to remain nimble and responsive to changing market, regulatory, and financial conditions, while maintaining strong Board oversight and public transparency.

Each FY 2025–26 objective falls into one of the following categories, as shown in the table:

- **Completed** – The objective was fully achieved during the FY 2025–26 period and does not require continuation as a standalone strategic objective.
- **Carried Forward** – The objective continues into FY 2026–27 with substantially the same intent, sometimes with refined scope or updated timing.
- **Merged or Reframed** – Multiple related objectives were consolidated into a single, clearer strategic objective, with specific actions tracked at the staff level.
- **Relocated** – The work continues but is aligned under a different strategic goal to better reflect accountability and implementation responsibility.
- **Operationalized** – The objective has been fully embedded into ongoing agency practices or internal controls and no longer requires strategic-level tracking.

FY25–26 Objective #	FY 2025–26 Objective (Original Language)	Most Recent Status	Transition Status	FY 2026–27 Location / Notes
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.	Completed	Carried Forward (Reframed)	Incorporated into Proposed Objective 1.1 (Expand awareness through targeted outreach); presentation frequency retained as staff-level task.
1.2	Present OCPA to key stakeholders in at least two (2) prospective member cities to promote OCPA's mission and benefits.	Completed	Merged	Consolidated into Proposed Objective 1.1 , which includes outreach to stakeholders in 2+ prospective cities annually.
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.	Completed	Carried Forward (Expanded)	Elevated to Proposed Objective 1.2 , with staff-level tasks covering youth programs, curriculum development, internships, and elected-official education.
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	Relocated	Work continues under Proposed Objective 3.1 (underserved populations) and 3.3 (outreach tools and resource landing page).
2.1	Ensure affordable rates for OCPA customers while covering all expenses and advancing equitable renewable energy initiatives.	Completed	Carried Forward (Strengthened)	Reframed as Proposed Objective 2.1 , focusing on cost-of-service analysis, rate design scenarios, and long-term affordability.
2.2	Strengthen Financial Resilience and Credit Rating Preparation.	In Progress	Carried Forward (Re-timed)	Continued as Proposed Objective 2.2 , with reserve rebuilding and credit readiness shifted to a more appropriate timeline.
2.3	Explore innovative financing to optimize long-term power procurement costs and educate the board on options.	Completed	Carried Forward (Next Phase)	Embedded in Proposed Objective 2.2 as ongoing evaluation and use of prepayment and innovative financing strategies.
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.	Completed	Carried Forward (Next Phase)	Continued under Proposed Objective 4.2 via DAC-GT program implementation and local generation solicitation.
3.1	Finalize the Community Needs Assessment for the Community Power Plan and present the findings and next steps.	Completed	Carried Forward (Implementation Phase)	Transitioned to Proposed Objective 3.1 , which focuses on implementing programs informed by the Community Power Plan.

3.2	Develop three (3) new customer programs consistent with the needs identified in the Community Needs Assessment of the OCPA Community Power Plan.	Completed	Carried Forward	Explicitly included in Proposed Objective 3.1 (implement 3 additional new programs with equity focus).
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.	Completed	Carried Forward	Continued as Proposed Objective 3.2 (new 25% year-over-year growth target).
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	Carried Forward	Continued as Proposed Objective 3.3 (low-income resource landing page and outreach).
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	Partially Carried / Reframed	Broadened under Proposed Objective 4.1 to emphasize DAC-GT and local generation/storage partnerships; storage scale now tracked at staff level.
4.2	Establish precise metrics and effective tools to proficiently identify, avoid, and mitigate market and credit risks for OCPA.	In Progress	Carried Forward	Continued as Proposed Objective 4.2 (risk matrix, hedging feasibility, portfolio risk management).
4.3	Create local partnerships with clean technology companies to advance emerging long-term energy storage and technologies.	In Progress	Merged	Integrated into Proposed Objective 4.2 through partnerships with clean-tech providers.
4.4	Forge partnerships with other CCAs to acquire shared resources, mitigate development risks, and capitalize on economies of scale.	Completed	Carried Forward	Continued as Proposed Objective 4.4 (joint procurement, EEI agreements, shared resources).
4.5	Create a more sustainable electric grid with measurable milestones above California’s renewable energy goals.	Completed	Merged	Embedded within Proposed Objective 4.2 (benchmarking renewable and GHG performance above statewide metrics).
4.6	Create partnerships with member agencies to identify local development opportunities.	In Progress	Merged	Integrated into Proposed Objective 4.1 (local generation partnerships with member agencies).
4.7	Release at least two (2) long-term solicitations for renewable energy resources.	In Progress	Carried Forward	Included in Proposed Objective 4.2 (long-term power products solicitation and joint procurement).

5.1	Develop a toolkit of materials for Board member use in engaging with prospective cities about OCPA.	Completed	Carried Forward	Continued as staff-level task under Proposed Objective 5.3 (Board tools and training).
5.2	Host at least two (2) independent pop-up events in member cities per quarter.	Completed	Reframed	Incorporated into Proposed Objective 5.1 (culturally inclusive events and outreach); frequency tracked operationally.
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	Carried Forward	Explicitly included in Proposed Objective 5.1 .
5.4	Develop education curricula for elected officials and their staff; provide this training opportunity annually.	In Progress	Carried Forward	Continued under Proposed Objective 1.2 (education curricula) and reinforced in Proposed Objective 5.3 (Board/stakeholder education).
5.5	Develop working relationships with culturally representative organizations to ensure representative and equitable outreach in the top threshold languages.	Completed	Carried Forward (Less Prescriptive)	Continued in Proposed Objective 5.1 ; language specificity tracked at staff level.
5.6	Enhance OCPA's legislative and regulatory advocacy efforts by developing an advocacy roadmap.	Completed	Carried Forward (Reframed)	Expanded as Proposed Objective 5.2 (advocacy, stakeholder mapping, policy risk tools).
5.7	Develop and implement a regulatory monitoring framework to ensure all departments are consistently informed about regulatory changes and their implications.	Completed	Operationalized	No longer a standalone strategic objective; treated as an internal control supporting Proposed Objective 5.2 .
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 Progress	Carried Forward	Explicit staff-level task under Proposed Objective 5.2 .

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.	Completed	06/08/2026	Director of Communications & External Affairs	4/8/2025	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. For 1Q26, OCPA presented on nine occasions, including Coastline ROP, the Women in Cleantech Forum, and the Laguna Beach Environmental Sustainability Committee.
#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	4/8/2025	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.	Completed	06/01/2026	Director of Communications & External Affairs	4/8/2025	Curriculum development in partnership with the OC Department of Education is almost complete with an anticipated launch of 3Q26, 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	12/1/2025	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. Continued to new SP Plan.
#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	4/8/2026	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. - continued below

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).

On March 19, 2026, OCPA successfully closed its first Renewable Energy Prepayment Bond transaction through the California Community Choice Financing Authority (CCCFA), marking a major milestone in the agency's strategy to manage power supply costs, strengthen rate stability, and support long-term customer affordability. The \$929.4 million Clean Energy Project Revenue Bonds, Series 2026D (Green Bonds), were priced on March 9, 2026, and are expected to deliver an estimated 12.45% discount in energy costs for power covered by the program, generating approximately \$25.3 million in total savings over the initial five-year period. These savings are expected to be locked in through 2031, when the bonds will be repriced pursuant to the transaction structure. Despite heightened global financial market volatility, OCPA successfully executed the transaction and secured meaningful savings during the current reset period.

The bonds received an Aa2 rating from Moody's and a Green Bonds designation from Kestrel Verifiers, reflecting the transaction's strong credit quality and alignment with recognized green financing standards. The financing supports the prepayment of a 30-year supply of EPS-compliant energy for OCPA, including approximately 2.1 million MWh of prepaid energy during the initial reset period, and represents OCPA's first prepayment transaction. This transaction adds an important financing tool to OCPA's long-term procurement strategy by helping reduce energy costs, mitigate market volatility, and support long-term clean energy and customer affordability objectives. Morgan Stanley served as the sole managing underwriter, Energy Prepay XI, LLC served as the prepaid energy supplier, and the bond issuance was completed through CCCFA.

#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. Following approval, the OCPA team initiated internal planning for the program's initial implementation. As an early milestone, the team has begun preparations to launch an RFP to solicit a new solar or solar-plus-storage project located within DAC areas to support the program over the long term. Before issuing the RFP, OCPA intends to file an Advice Letter with the CPUC by April 7 to obtain approval of its DAC-GT solicitation materials.
#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.	Completed	02/09/2026	Director of Communications & External Affairs	4/8/2026	The Community Power Plan was adopted by the OCPA Board of Directors on February 9, 2026
#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.	Completed	04/01/2026	Director of Communications & External Affairs	4/8/2028	The Renter Energy Efficiency program launched in March 2026. 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.	Completed	06/01/2026	Director of Communications & External Affairs	6/3/2025	OCPA program and grant engagement continue to grow. This goal will continue on the new SP Plan.
#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	4/8/2025	The landing page is being designed now with the goal of going live at the end of April.
#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.	Completed	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.	Completed	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. OCPA transacted for new energy storage projects and was awarded a top clean energy provider award by the NREL.

#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. As a best practice, this objective is also on the next SP Plan.
#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.	Completed	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.	In progress	02/01/2026	Director of Communications & External Affairs	4/8/2026	OCPA partnered with the Asian Business Association Collective for Community Power Plan data gathering, partnered 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, and executed a contract with Ebee Connect for translation services.
#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		Continued to new SP Plan
#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	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 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. Recognized by Asian business association, Filipino American chamber of commerce, and the Iranian American chamber of commerce for sustainable and community impact.
#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	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.
#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	4/8/2026	New framework is in place.
#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	4/8/2026	Continued to new SP Plan

Goal Area	Strategic Objective	Task	Owner	Due Date	Status
Goal 1: Enrich & Grow the OCPA Community	Obj 1.1 — Expand awareness of OCPA through targeted outreach to prospective member cities and regional organizations				
		Present to 2 groups/quarter in OC region	Jacquie Henderson	Ongoing	Not Started
		Present to stakeholders in 2+ prospective cities annually	Jacquie Henderson	Jun-27	Not Started
		Develop stakeholder engagement talking points	Jacquie Henderson	Jul-26	Not Started
Goal 1: Enrich & Grow the OCPA Community	Obj 1.2 — Develop educational programs and partnerships promoting renewable energy understanding across age groups				
		Develop school partnerships and curriculum support	Jacquie Henderson	Jun-27	Not Started
		Launch youth ambassador / internship program	Jacquie Henderson	Sep-26	Not Started
		Establish curriculum for community academy program(s)	Jacquie Henderson	Mar-27	Not Started
Goal 2: Fiscal Sustainability & Affordability	Obj 2.1 — Deliver a financially sustainable 2027 rate and product framework grounded in cost-of-service analysis, product pathway evaluation, and disciplined cost management				
		Launch cost-of-service and product pathway workplan, including consultant management, kickoff, data request, and internal coordination	Tiffany Law	Apr-2026	Not Started
		Evaluate feasible product pathways and provide procurement, compliance, cost, and portfolio inputs to support COS and rate design	Louis Ting	Apr-May 2026	Not Started
		Integrate product pathway analysis into the COS study and rate design framework	Tiffany Law	May-Jun 2026	Not Started
		Complete draft COS model, revenue requirement analysis, and initial Board briefing	Tiffany Law	Jun-2026	Not Started
		Develop rate design scenarios and evaluate financial, affordability, and competitiveness impacts	Tiffany Law	Jun-Aug 2026	Not Started
		Refine rate design scenarios and complete customer rate impact and bill impact tools	Tiffany Law	Aug-Sep 2026	Not Started
		Present preliminary procurement and portfolio findings that inform product feasibility and Board consideration	Louis Ting	Sep-2026	Not Started
		Conduct public meetings and return final rate design and product framework for Board action	Tiffany Law	Nov-Dec 2026	Not Started
Goal 2: Fiscal Sustainability & Affordability	Obj 2.2 — Advance credit rating readiness and innovative financing strategies to position OCPA for a potential public credit rating process in 2028				
		Evaluate additional prepayment and other innovative financing opportunities	Tiffany Law	Q4 2026	Not Started
		Develop a credit rating readiness roadmap and complete 2027 rate and product decisions that strengthen financial sustainability	Tiffany Law	Q4 2026	Not Started
		Strengthen procurement, hedging, portfolio risk management, and core financial/risk policies to support credit readiness	Tiffany Law & Louis Ting	Q2 2027	Not Started
		Maintain positive net income, monitor customer retention, strengthen member/customer stability narrative, and rebuild reserves toward Board targets	Tiffany Law; Joe Mosca & Jacquie Henderson	2026-29	Not Started
		Prepare rating materials, conduct mock review, brief the Board, and determine whether to pursue a formal public rating process	Tiffany Law	Q1 2028	Not Started
		Launch formal rating process, if approved	Tiffany Law	Q2-Q3 2028	Not Started
Goal 3: Design & Deploy Community-Aligned Customer Programs	Obj 3.1 — Implement customer programs informed by the Community Power Plan, with focus on equity and underserved populations				
		Implement 3 new programs based on the Community Power Plan	Jacquie Henderson	Apr-27	Not Started
		Provided enhanced program opportunities to underserved populations	Jacquie Henderson	Ongoing	Not Started
		Build relationships with new CBOs representing diverse ratepayers in member cities to further OCPA messaging reach	Jacquie Henderson	Ongoing	Not Started
Goal 3: Design & Deploy Community-Aligned Customer Programs	Obj 3.2 — Grow grant and program participation year-over-year				
		Expand grant offerings with 25% YoY growth target	Jacquie Henderson	Jun-27	Not Started
		Measurably increase participation in long-term programs in subsequent timeframes	Jacquie Henderson	Ongoing	Not Started
Goal 3: Design & Deploy Community-Aligned Customer Programs	Obj 3.3 — Strengthen community outreach to provide customers with access to OCPA programs and resources				
		Develop a website landing page that encompasses the breadth of low-income resources available to OCPA customers	Jacquie Henderson	Sep-26	Not Started
		Establish a network of organizations, platforms, and contacts to support promotion of OCPA programs and resources	Jacquie Henderson	Ongoing	Not Started
Goal 4: Energize Our Community with Renewable Energy Sources	Obj 4.1 — Maintain a diversified, cost-effective power portfolio with risk management protocols that adapt to market conditions				

Goal 4: Energize Our Community with Renewable Energy Sources	Obj 4.2 — Advance local generation and storage programs through partnerships with member agencies and clean technology providers	Establish risk matrix for hedging opportunities, determine feasibility based on ERMP	Louis Ting	Jun-27	In Progress
		Release the long-term power products solicitation and evaluate bi-lateral offers concurrently	Louis Ting	Mar-27	In Progress
		Identify and release joint procurement for resources based on alignment of priorities with other CCA's	Louis Ting	Jun-27	In Progress
		Benchmark renewable energy and GHG emissions against other LSEs and statewide metrics	Louis Ting	Ongoing	In Progress
		Utilize Integrated Resource Plan filing as the roadmap for OCPA's renewable energy future, and GHG reduction goals to meet or surpass statewide goals	Louis Ting	Aug-26	In Progress
Goal 4: Energize Our Community with Renewable Energy Sources	Obj 4.3 — Collaborate with other CCAs on joint procurement, shared resources, and knowledge exchange	Issue CPUC-approved solicitation for the DAC-GT program per CPUC Resolution E-5435 to impleement OCPA's proposed 10% discount rate for CARE and FERA customers	Louis Ting	Jun-27	In Progress
		Outreach with customers, developers, clean tech companies, to garner strategies and pathways, including develop a RFI based on engagement outcomes	Louis Ting	Jun-27	In Progress
Goal 5: Raise Awareness of Community Energy & Advocate for Our Customers	Obj 5.1 — Strengthen community engagement through culturally-inclusive events, networking, and business outreach	Execute EEI agreement with Clean Power Alliance for energy trading	Louis Ting	Jun-26	In Progress
		Execute EEI agreement with Clean Energy Alliance for Prepay and other energy trading efforts	Louis Ting	Jun-26	In Progress
		Execute EEI with Dynasty Power	Louis Ting	Jun-26	In Progress
		Execute agreements with additional CCA partners and counterparties	Louis Ting	Ongoing	In Progress
		Outreach to CCA counterparts, identify CCA practices, and benchmarking relevant metrics	Louis Ting	Jun-27	In Progress
Goal 5: Raise Awareness of Community Energy & Advocate for Our Customers	Obj 5.2 — Advance regulatory and legislative advocacy to enhance affordability for our customers, protect our customers' interests, and support CCA-favorable policy outcomes	Sponsor or facilitate small business mixer	Jacque Henderson	Sep-26	Not Started
		Continue building culturally representative outreach partnerships	Jacque Henderson	Ongoing	Not Started
		Increase OCPA Board member engagement in community events	Jacque Henderson	Ongoing	Not Started
Goal 5: Raise Awareness of Community Energy & Advocate for Our Customers	Obj 5.3 — Equip Board members with tools, training, and structured support for effective policy engagement	Develop stakeholder mapping document for OCPA staff, board members, and community advisory committee to enable strategically targeted outreach and advocacy	Regulatory and Legislative Manager	Sep-26	Not Started
		Create Policy Risk Assessment Guide to analyze rulemaking and policy impacts on OCPA customer affordability, OCPA operations, and other areas to inform OCPA regulatory priorities	Regulatory and Legislative Manager	Dec-26	Not Started
		Develop and update accomplishment tracker to illustrate impact of advocacy wins via promotional materials	Regulatory and Legislative Manager	Dec-26	Not Started
		Develop and release an Energy Policy 101 resource to improve baseline understanding of energy policy and regulatory frameworks among stakeholders	Regulatory and Legislative Manager	Dec-26	Not Started
		Coordinate Board member legislative visits for OCPA related priorities in Sacramento/DC (strategic assignments)	Regulatory and Legislative Manager	Ongoing	Not Started
Goal 5: Raise Awareness of Community Energy & Advocate for Our Customers		Develop Board member resources for prospective city engagement	Jacque Henderson	Dec-26	Not Started
		Develop study sessions for Board members and other key stakeholders (Geopolitical and global energy updates; ERRA forecast + rates primer; summer outlook/CPUC benchmarks; PCIA; Energy costs (full stack costs and revenue model)	Joe Mosca	Sep-26	Not Started

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: April 13, 2026

Green Prepayment Bonds Update

On March 19, 2026, OCPA successfully closed its first Renewable Energy Prepayment Bond transaction through the California Community Choice Financing Authority (CCCFA), marking a major milestone in the agency’s strategy to manage power supply costs, strengthen rate stability, and support long-term customer affordability.

The \$929.4 million Clean Energy Project Revenue Bonds, Series 2026D (Green Bonds), were priced on March 9, 2026, and are expected to deliver an estimated 12.45% discount in energy costs for power covered by the program, generating approximately \$25.3 million in total savings over the initial five-year period. This 12.45% discount is among the strongest publicly announced prepayment savings rates in the CCA industry over the past 12 months and exceeds the historical 8% to 12% range often cited for these transactions. These savings are expected to be locked in through 2031, when the bonds will be repriced pursuant to the transaction structure. Despite heightened global financial market volatility, OCPA successfully executed the transaction and secured meaningful savings during the current reset period.

The bonds received an Aa2 rating from Moody’s and a Green Bonds designation from Kestrel Verifiers, reflecting the transaction’s strong credit quality and alignment with recognized green financing standards. The financing supports the prepayment of a 30-year supply of EPS-compliant energy for OCPA, including approximately 2.1 million MWh of prepaid energy during the initial reset period, and represents OCPA’s first prepayment transaction. This transaction adds an important financing tool to OCPA’s long-term procurement strategy by helping reduce energy costs, mitigate market volatility, and support long-term clean energy and customer affordability objectives.

Morgan Stanley served as the sole managing underwriter, Energy Prepay XI, LLC served as the prepaid energy supplier, and the bond issuance was completed through CCCFA.

Media release: [Orange County Power Authority Secures First Green Prepayment Bond, Locking In \\$25.3 Million In Energy Cost Savings Over Initial Five Years - Orange County Power Authority](#)

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.

Irvine Capital Loan Repayment Update

On October 13, 2025, the Board approved an early paydown of the Irvine Capital Loan and directed staff to proceed in accordance with the recommended repayment schedule.

In accordance with that direction, OCPA made the first accelerated repayment on November 10, 2025, totaling \$913,892.11, which included \$250,000 in principal and \$663,892.11 in accrued interest. OCPA made the second quarterly repayment on March 31, 2026, totaling \$342,702.67, which included \$250,000 in principal and \$92,702.67 in accrued interest.

Three additional quarterly repayments remain scheduled under the approved repayment plan. Based on the current schedule, OCPA is projected to fully repay the loan by January 1, 2027, with total repayments of \$8,433,975.23, including \$7,527,841.00 in principal and \$906,134.23 in accrued interest.

Payment Period	Principal Amount	*Accrued Interest Not to Exceed Amount	*Aggregate Principal and Interest Amount
Period No. 1: No earlier than November 10, 2025, and no later than December 31, 2025	\$250,000.00	\$663,892.11	\$913,892.11
Period No. 2: No earlier than January 1, 2026, and no later than March 31, 2026	\$250,000.00	\$92,702.67	\$342,702.67
Period No. 3: No earlier than April 1, 2026, and no later than June 30, 2026	\$250,000.00	\$57,766.30	\$307,766.30
Period No. 4: No earlier than July 1, 2026, and no later than September 30, 2026	\$2,500,000.00	\$56,315.34	\$2,556,315.34
Period No. 5: No earlier than October 1, 2026, and no later than January 1, 2027	\$4,277,841.00	\$35,457.81	\$4,313,298.81
Total	\$7,527,841.00	\$906,134.23	\$8,433,975.23

Tour of Diablo Canyon Nuclear Power Plant

On Friday, our Director of Power Resources, Louis Ting, Regulatory Analyst Matt Chill, and I joined staff and board members from several CCAs and CalCCA for a tour of the Diablo Canyon Nuclear Power Plant (DCPP).

DCPP is the last operating nuclear power plant in California and produces roughly 8-10% of the state's electricity, making it a very important part of California's electric generation fleet. The plant was originally scheduled to be decommissioned in 2024 (Unit 1) and 2025 (Unit 2). However, due to grid reliability concerns and rising electricity costs, California passed legislation to extend operations through 2030. The extension is funded through charges shared by all CAISO ratepayers. There is now a discussion about potentially extending the plant's operation beyond 2030 by 5 to 20 years. CalCCA has been working to develop guiding principles for how we would engage in these discussions, ensuring that our ratepayers remain a top priority in any legislation. While no legislation has been introduced yet, there is reason to believe proposals may be forthcoming.

The tour itself was extremely informative. DCPP sits on thousands of acres of pristine Central Coast property, including approximately 14 miles of beautiful California coastline. During our tour, we were able to access several areas within both the property and the facility. We reviewed a wide range of operations, including the seawater intake and outfall systems, environmental protection measures, generators, the control center, the reactors, the onsite storage areas for the spent fuel, and the multiple layers of security across the site.

We spent over an hour meeting with senior members of the PG&E staff who operate the facility. They shared valuable insights into the costs of running the plant, the anticipated capital investments that may be necessary in the future, and the regulatory permits needed to maintain compliance.

The tour was highly beneficial, offering an up-close view of how the facility is managed and what is required to operate this facility. Diablo Canyon supplies electricity to around 4 million Californians—approximately 3 million homes—accounting for about 8 to 10% of the state's total electricity needs.

OCPA Load Management Standards Plan Update

On March 19, 2024, the Board approved the OCPA Load Management Standards (LMS) Plan and authorized staff to submit the plan to the California Energy Commission (CEC), including any future updates required by the CEC.

Over the past year, staff worked closely with CEC staff to further refine and update the plan. The updated plan demonstrates OCPA's continued compliance with the CEC's Load Management Standards through the provision of Rate Identification Numbers (RINs) on customer bills and the upload of hourly rate tables for each Time-of-Use (TOU) rate to the CEC's Market Informed Demand Automation Server (MIDAS). The plan also documents OCPA's research on residential load shifting and concludes that participation in dynamic rates would require a level of energy sophistication and monitoring effort that would be burdensome for most residential customers.

Based on discussions with CEC staff, OCPA proposes to satisfy LMS requirements by offering a dynamic rate to large commercial and industrial customers. This would initially be implemented as a limited pilot program. Staff has also developed an implementation timeline with target milestones leading to the launch of the pilot in late 2027 or early 2028.

The updated plan was reviewed by CEC staff and docketed with the CEC on March 13, 2026. CEC staff currently anticipates bringing the updated plan forward for CEC Board approval in May 2026.

Communications & External Affairs Updates

Communications

- A mailer promoting OCPA's renter program was sent to customers enrolled in FERA and Medical Baseline this week, approximately 3,000 households. One anecdote we received was from a Medical Baseline resident who expressed a deep need for the program due to needing to keep their body temperature regulated and ensure their medical devices remain active during power outages. They said having our equipment and not having to use the expensive central air system is "a Godsend."
- OCPA's Community Engagement Manager Linda Kramer was honored at the [Women Making A Difference Event](#), nominated for Costa Mesa by the 5th District Supervisor Katrina Foley. She received well-deserved recognition for climate advocacy, community support, and green business promotion. Irvine winners included Senait Forthal of OC Goes Solar, Annette Walker, President of City of Hope, Makana Nova, Orange County Coastal Resource Manager, and Dr. Ravita Reddy, CEO of EVGateway.
- OCPA hosted its annual Staffers Luncheon on March 19, where we connected with City Staff from our member cities as well as representatives from local Assembly member and Senator offices. We shared information on the latest programs, which the majority of attendees agreed to share in their respective newsletters and social media channels.
- The Renter Energy Efficiency Program was included in the [ACC-OC Policy Pulse email](#).
- The OCPA [Board of Directors webpage](#) has been updated with the new group photo and also now lists city alternates.

Community Engagement & External Affairs

- CFO Tiffany Law represented OCPA on a panel at last week's Women in Tech 2.0 Symposium in Irvine. Hosted by Quantum eMotion, the event provided an opportunity for OCPA's thought leadership and showcased an incredible executive.
- OCPA participated in the first Fullerton Youth Government Day at City Hall. City staff from eight departments provided demonstrations, and OCPA was able to share information on the Renter Energy Efficiency Program and cleantech jobs.
- Staff attended the North OC Chamber of Commerce monthly Board meeting in Buena Park, where we learned of upcoming events for OCPA to attend and connect with stakeholders.

- Staff also attended a legislative/regulatory update with Assemblymember Phillip Chen in Brea. Assemblymember Chen was receptive to the CCA information provided and supportive of the legislation OCPA is tracking, which supports LSE transparency and affordability.
- OCPA tabled at the Buena Park School District Career Fair, where staff shared information on clean energy and environmental career jobs. We also used the opportunity to promote the Renter Energy Efficiency Program. BP School District Governing Board Members Rhodia Shead and Michael Jensen stopped by the OCPA booth to discuss cleantech jobs and home electrification.
- OCPA attended the Fountain Valley Chamber's "Connect" event featuring Mayor Jim Cunneen, where we engaged with numerous stakeholders in attendance.
- Staff attended the Orange County Business Council (OCBC) Government Affairs Committee meeting featuring Assemblymember Diane Dixon, who focused her remarks on government regulation, particularly in the healthcare sector.
- OCPA attended the Irvine State of the City event, representing OCPA and engaging with a range of local stakeholders, city staff, and community leaders ahead of the presentation.
- Staff participated in the CSUF Campus Tour event hosted by CSUF Sustainability and Facilities Management. The tour included industry guests from South Coast AQMD, students, and the Orange County Power Authority. We learned that CSUF is actively looking for a way to have a microgrid and battery storage to manage the use of extra solar generation when classes are low in the summer.
- OCPA staff met with the newly forming Orange County Women's Business Chamber last week to learn about their mission and connect with members. We are exploring an advisory role on the Power and Energy Committee.
- OCPA attended the Fountain Valley State of the City event, which we sponsored. We engaged with local elected officials, staff, and community stakeholders in attendance.
- Staff attended the Coastline ROP Program to give an introduction on OCPA and cleantech jobs with students from Irvine, Costa Mesa, Newport Beach, and Tustin. The students had many questions about types of renewable energy and storage, local climate actions, and pathways to gain experience in the cleantech and environmental field.
- OCPA also attended the online State and Local Energy and Climate Coordination Quarterly Meeting. We heard updates from CARB on local opportunities for Energy Efficiency Programs, and the CPUC on decommissioning gas lines in priority communities.

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 is live! [Here is a link to the landing page](#), and here is a link to the explainer video: [English](#) / [Spanish](#). The mailer hit mailboxes this week, from which we're seeing an increased number of applications. Please let us know if you need any additional materials to promote the program to your communities. The application closes on April 5th.
- ***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*** Energy 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. Orange County United Way will be supporting the community outreach based on a formal RFQ process, and will include mention of this program in the Renter Energy Efficiency Program mailer going out next week.
- Residential Battery Rebate Program: To-date, 51 applications have been approved, 28 claims have been requested, 20 claims have been approved, and 16 rebates have been sent. Program applications will be accepted until May 2026.

Human Resources Updates

Recruitment

- **External Affairs Manager**: The position is still open, and we will begin recruitment in the coming weeks. More details will be provided soon. The OCPA website is regularly updated with all active job openings. Please feel free to share information about our available positions and recruitment efforts.
- **Regulatory & Legislative Manager**: Panel interviews have concluded this week, with final interviews anticipated in the coming weeks.
- **Rates & Revenue Manager**: The position remains open, with phone screens scheduled.

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
3/9/2026	Monday	Fullerton Collaborative	OCAPA 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	Sustainability Campus Tour	Fullerton	10:00 AM	11:00 AM
3/12/2026	Thursday	Buena Park Middle School	Career Night	Buena Park	5:00 PM	7:00 PM
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	OCAPA 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
4/8/2026	Wednesday	Laguna Beach Cultural Arts Center	Earth Month Film Festival	Orange County (All)	6:30 PM	9:00 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

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
4/18/2026	Saturday	City of Irvine	Earth Day Event	Irvine	11:00 AM	2:00 PM
4/20/2026	Monday	Orange County Women's Business Chamber	Board Installation Lunch-Invitation Only	Orange County (All)	n/a	n/a
4/22/2026	Wednesday	City of Irvine/Councilmember Liu	Solar and Power Town Hall	Irvine	6:00 PM	7:30 PM
4/22/2026	Wednesday	Irvine Valley College	Earth Day Event	Irvine	11:00 AM	2:00 PM
4/24/2026	Friday	Rivian Theatre Laguna Beach	Earth Night Event	Orange County (All)	6:30 PM	9:00 PM
4/30/2026	Thursday	City of Irvine/OC Goes Solar	Electrification Event	Irvine	n/a	n/a
5/2/2026	Saturday	City of Irvine	CicloIrvine	Irvine	11:00 AM	4:30 PM

Attachments:

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

Attachment B – Renter Energy Efficiency Program Flyers (English, Spanish, Vietnamese, Korean, Chinese simplified)

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	Orange County's United Way	03/01/2026-02/29/2028	\$50,000	Community Outreach and Engagement Subcontractor	
2	SDI Presence LLC	03/31/2026-03/31/2027	\$66,261	Managed IT Services and In-Person IT Support 1-year extension	