

Orange County Power Authority
Policy No. 9 - New Customer Communities Policy
Revised: September 8, 2025

Purpose

It is the purpose of this New Customer Communities Policy to describe the process for interested cities and counties to become a member agency of OCPA and be provided retail electric service and other energy programs. The addition of new communities increases buying power and reaffirms the viability of community choice energy by providing local control, competitive rates, rate stabilization, renewable energy, and other incentives for cities and counties. It is within the interests of OCPA to explore the provision of retail electric service in new communities to further OCPA goals. The addition of new communities into OCPA will also increase the voice and status of OCPA in legislative and regulatory matters at the California Public Utilities Commission, California Energy Commission, California Air Resource Board, the California State Legislature and elsewhere.

New Member General Criteria

- A. The new member supports the mission, vision, goals, and objectives of OCPA, including energy efficiency, conservation, and greenhouse gas reduction as established in the OCPA Joint Powers Agreement, as amended, and OCPA policies.
- B. The new member commits to supporting OCPA through regulatory, legislative, and other policy support, where possible.
- C. Inclusion of the new member has policy and financial benefits to OCPA and does not have financial impacts to OCPA's stability or to current members or customers.

OCPA Membership Process

The following process is a general guide for analysis and potential admission of a new member pursuant to the Joint Powers Agreement and as administered by the OCPA Chief Executive Officer or designee. The sequence is based on lead time for necessary steps and regulatory deadlines.

- A. The prospective new member's governing body or management submits written interest in being considered as an OCPA member.
- B. OCPA staff evaluates the prospective member's interest and determines financial, operational, and other impacts to OCPA, if any.
- C. As part of OCPA's staff evaluation, a pro forma analysis should be conducted by OCPA to determine impacts, whereby OCPA or the prospective member must request the most current year(s) electricity data for their jurisdiction from the incumbent utility and provide or allow OCPA to review the data. The prospective member shall execute all necessary utility forms required for the release and review of such data.

- D. If the results of OCPA's staff evaluation are positive, the Chief Executive Officer or designee provides notice to existing OCPA members of the potential addition of a new member to ensure sufficient notice is provided pursuant to the Joint Powers Agreement.
- E. As required by the Joint Powers Agreement, the prospective member adopts a resolution of intent to join OCPA, adopts an ordinance authorizing OCPA's community choice aggregation program to be implemented within the member's jurisdiction, and executes the Joint Powers Agreement.
- F. OCPA staff presents the prospective membership, pro forma analysis, and any other analysis to the OCPA Board of Directors. The Board may then consider approval of a resolution adding the new member. Presentation of the pro forma analysis and other information on perspective membership may take place at the same meeting as formal approval of the resolution, or at a prior meeting of the Board.
- G. OCPA submits an amended Implementation Plan to the California Public Utilities Commission (CPUC) for certification no later than December 31 of the calendar year.