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August 30, 2021

**Advice No. 5857**

(Southern California Gas Company – U 904 G)

**Advice No. 3839-E/3010-G**

(San Diego Gas & Electric Company – U 902 M)

**Advice No. 4483-G/6307-E**

(Pacific Gas and Electric Company – U 39 M)

**Advice No. 4577-E**

(Southern California Edison Company – U 338-E)

Public Utilities Commission of the State of California

**Subject: Joint Community Based Organization (CBO) Reporting Template of SoCalGas, SDG&E, SCE, and PG&E Pursuant to Decision (D.) 21-06-036 Ordering Paragraph (OP) 8**

**Purpose**

In accordance with Decision (D.) 21-06-036, Ordering Paragraph (OP) 8, Southern California Gas Company (SoCalGas), San Diego Gas & Electric Company (SDG&E), Southern California Edison (SCE), and Pacific Gas and Electric Company (PG&E) – jointly the investor-owned utilities (IOUs) – hereby submit to the California Public Utilities Commission (Commission or CPUC) this Advice Letter (AL) proposing a reporting template that displays the IOUs' CBO networks, as shown in Attachment A.<sup>1</sup>

**Background**

On March 4, 2020, Governor Newsom declared a State of Emergency related to the COVID-19 pandemic and followed up on March 19, 2020, with an executive order for Californians to shelter in place except to meet essential needs.<sup>2</sup> In response, on April

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<sup>1</sup> D.21-06-036 at OP 8.

<sup>2</sup> Executive Department of California, Proclamation of State of Emergency (March 4, 2020),

16, 2020, the Commission adopted Resolution (Res.) M-4842, Emergency Authorization and Order Directing Utilities to Implement Emergency Customer Protections to Support California Customers During the COVID-19 Pandemic.<sup>3</sup> Res. M-4842 ordered the utilities to submit Tier 2 ALs describing all reasonable and necessary actions to implement the Emergency Customer Protections and set the end date for the Emergency Customer Protections as April 16, 2021.<sup>4</sup>

On February 11, 2021, the CPUC approved Res. M-4849, which extended the Emergency Customer Protections to June 30, 2021, and ordered the creation of transition plans to facilitate the smooth transition for customers when the Emergency Customer Protections are lifted.<sup>5</sup>

On February 17, 2021, the Commission established an Order Instituting Rulemaking (OIR) to Address Energy Utility Customer Bill Debt Accumulated During the COVID-19 Pandemic, to consider the necessity of establishing special relief mechanism(s) for customers who could not pay their energy bills in full during the COVID-19 pandemic to provide them an opportunity to become current on their energy bills.<sup>6</sup>

On June 24, 2021, the Commission approved D.21-06-036, *Decision Addressing Energy Utility Customer Bill Debt Via Automatic Enrollment In Long Term Payment Plans*, which among other items, extended the disconnection moratorium for nonpayment until September 30, 2021, for Residential and Small Business Customers.<sup>7</sup> D.21-06-036 orders the IOUs to begin documenting their partnerships with CBOs and jointly develop a template displaying their current CBO networks, to help the hard-to-reach (HTR) customers navigate important relief programs. D.21-06-036 also orders the IOUs to submit their template to the Energy Division via a Tier 2 AL submittal within 60 days of the issuance of this decision.<sup>8</sup>

### **Overview of the Joint IOU CBO Network Reporting Template**

CBOs are present across the IOUs' service territory and have expertise in local culture and needs, securing benefits, services, and support. The Joint IOU CBO reporting template is a collaborative effort designed to strategically leverage the IOUs' partnerships with CBOs. The template incorporates the IOUs' current CBO networks, structures for compensating CBOs, CBO links, and benefits delivered to disadvantaged and vulnerable communities, Environmental and Social Justice Communities, small business customers, tribes, access and functional needs communities, and other HTR

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available at: <https://www.gov.ca.gov/wp-content/uploads/2020/03/3.4.20-Coronavirus-SOE-Proclamation.pdf>; California Executive Order N-33-20 (March 19, 2020), available at: <https://www.gov.ca.gov/wp-content/uploads/2020/03/3.19.20-attested-EO-N-33-20-COVID-19-HEALTH-ORDER.pdf>.

<sup>3</sup> Res. M-4842, available at:

<https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M333/K482/333482381.PDF>.

<sup>4</sup> *Id.* at 4.

<sup>5</sup> Res. M-4849 at OP 5.

<sup>6</sup> Rulemaking 21-02-014.

<sup>7</sup> D.21-06-036 at OP 1.

<sup>8</sup> *Id.* at OP 8.

populations. In addition, the CBO reporting template includes the number of people the CBOs serve each month and outlines the different cities reached. The template also annotates what Customer Assistance Program information has been disseminated to the public. Consistent with D.21-06-036, the IOUs will work with Energy Division to finalize and populate the template for additional refinement.<sup>9</sup> The Joint IOU CBO network template is presented in Attachment A of this AL.<sup>10</sup>

### **Association of California Community and Energy Services (ACCES)**

On July 23, 2021, ACCES provided recommendations for the development of the Joint IOU CBO network template. The IOUs reviewed ACCES's recommendations, which center on establishing collaborative case management agreements with CBOs to help low-income customers better manage their energy bills and obtain assistance with arrears accumulated during the COVID-19 pandemic.<sup>11</sup>

The IOUs appreciate ACCES's recommendations and acknowledge that the IOUs can increase collaboration with CBOs. The IOUs recognize that CBOs are key partners in helping customers become aware of, understand, and enroll in the growing number of assistance programs, such as the Arrearage Management Plan (AMP). The IOUs also understand that there are additional opportunities to compensate CBOs for their continued support of customers impacted by the COVID-19 pandemic, such as the ongoing coaching that ACCES recommends to help customers remain enrolled in debt relief programs.<sup>12</sup> The IOUs are open to exploring compensation for CBOs who provide outreach and education to help customers navigate the plethora of programs that exist to provide arrearage relief. For example, this could include exploring adding interested CBOs to participate in the Community Help and Awareness of Natural Gas and Electric Services (CHANGES) program operated by the Commission, which is offered by some CBOs to connect Limited English Proficient (LEP) customers who need help managing the energy issues they are facing.

Outside of statewide programs such as the California Alternate Rates for Energy (CARE) and Family Electric Rate Assistance (FERA) Capitation program, which provide funding to CBOs to enroll eligible customers into CARE or FERA, the IOUs employ varying compensation models for CBOs. The IOUs recommend that the Commission include discussion of ACCES's recommendations – along with IOU best practices for working with other CBOs – in an upcoming stakeholder workshop in this proceeding where the CBOs, IOUs and other stakeholders can come together to discuss any gaps or opportunities presented in the template. Workshop discussion can also help examine

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<sup>9</sup> D.21-06-036 at 42. (“After the IOUs make their filing, the Commission's Energy Division will work cooperatively with the energy utilities to finalize the template, populate the map and companion report, and present it to the LIOB at a future LIOB meeting for additional refinement.”)

<sup>10</sup> On August 11, 2021, the CPUC Executive Division sent an email providing comments to the IOU's CBO reporting template. The Executive Division's recommendations have been incorporated into the template.

<sup>11</sup> July 26, 2021, CPUC Executive Division E-mail with July 23, 2021, ACCES Proposal on the IOUs/CBOs partnership reporting template.

<sup>12</sup> ACCES Proposal at 2.

the various compensation models for CBOs that the IOUs currently utilize, lay the groundwork for a more holistic approach to compensate CBO's that work in each IOU's service area, and consider appropriate options for cost recovery. The workshop would also support the Commission's aim as articulated in the July 29, 2021, Assigned Commissioner's and Administrative Law Judge's Ruling Amending Scope to understand "if any, what outstanding barriers, gaps, improvements in documentation and partnerships remain with CBOs in order to make sure that the hardest-to-reach customers navigate important relief programs."<sup>13</sup>

The IOUs propose adding an item to the stakeholder workshop agenda for collaborative discussion among all interested parties of ways to improve collaboration between CBOs and IOUs, including the ACCES' recommendations.<sup>14</sup>

### **Protest**

Anyone may protest this AL to the Commission. The protest must state the grounds upon which it is based, including such items as financial and service impact, and should be submitted expeditiously. The protest must be made in writing and must be received within 20 days of the date of this AL, which is September 19, 2021. The address for mailing or delivering a protest to the Commission is:

CPUC Energy Division  
Attention: Tariff Unit  
505 Van Ness Avenue  
San Francisco, CA 94102

A copy of the protest should also be sent via e-mail to the attention of the CPUC's Energy Division Tariff Unit ([EDTariffUnit@cpuc.ca.gov](mailto:EDTariffUnit@cpuc.ca.gov)). Due to the COVID-19 pandemic and the shelter at home orders, SoCalGas is currently unable to receive protests or comments to this AL via U.S. mail or fax. Please submit protests or comments to this AL via e-mail to the addresses shown below on the same date it is mailed or e-mailed to the Commission.

**For SoCalGas:** Attn: Ray B. Ortiz  
Tariff Manager - GT14D6  
555 West Fifth Street  
Los Angeles, CA 90013-1011  
Facsimile No.: (213) 244-4957  
E-mail: [ROrtiz@socalgas.com](mailto:ROrtiz@socalgas.com)  
E-mail: [Tariffs@socalgas.com](mailto:Tariffs@socalgas.com)

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<sup>13</sup> Rulemaking 21-02-014, Assigned Commissioner's and Administrative Law Judge's Ruling Amending Scope, at 8, July 29, 2021.

<sup>14</sup> *Id.* at ACCES Proposal.

**For SDG&E:** Attn: Greg Anderson  
Regulatory Tariff Manager  
8330 Century Park Court, CP31F  
San Diego, CA 92123-1548  
E-mail: [GAnderson@sdge.com](mailto:GAnderson@sdge.com) and  
[SDGETariffs@sdge.com](mailto:SDGETariffs@sdge.com)

**For SCE:** Attn: Shinjini C. Menon  
Managing Director, State Regulatory Operations  
Southern California Edison Company  
8631 Rush Street  
Rosemead, CA 91770  
Telephone: (626) 302-3377  
Facsimile: (626) 302-6396  
E-mail: [AdviceTariffManager@sce.com](mailto:AdviceTariffManager@sce.com)

Tara S. Kaushik  
Managing Director, Regulatory Relations  
c/o Karyn Gansecki  
Southern California Edison Company  
601 Van Ness Avenue, Suite 2030  
San Francisco, CA 94102  
Facsimile: (415) 929-5544  
E-mail: [Karyn.Gansecki@sce.com](mailto:Karyn.Gansecki@sce.com)

**For PG&E:** Attn: Sidney Bob Dietz II  
Director, Regulatory Relations  
c/o Megan Lawson  
Pacific Gas and Electric Company  
77 Beale Street, Mail Code B13U  
P.O. Box 770000  
San Francisco, CA 94177  
Facsimile: (415) 973-3582  
E-mail: [PGETariffs@pge.com](mailto:PGETariffs@pge.com)

### **Effective Date**

SoCalGas asserts this AL is subject to Energy Division disposition and should be classified as Tier 2 (effective after staff approval) pursuant to GO 96-B and the directive contained in OP 8 of D.21-06-036. Therefore, SoCalGas respectfully requests that this AL become effective for service on September 29, 2021, which is 30 calendar days after the date submitted.

**Notice**

A copy of this AL is being sent to SoCalGas' GO 96-B service list and the Commission's service lists in A.14-11-007, A.15-02-001, A.19-09-014, A.19-11-003, A.20-03-014, R.12-06-013, R.15-03-010, R.18-03-011, R.18-07-005, R.18-07-006, and R.21-02-014. Address change requests to the GO 96-B service list should be directed via e-mail to [Tariffs@socalgas.com](mailto:Tariffs@socalgas.com) or call 213-244-2837. For changes to all other service lists, please contact the Commission's Process Office at 415-703-2021 or via e-mail at [Process\\_Office@cpuc.ca.gov](mailto:Process_Office@cpuc.ca.gov).

An Excel workbook of the IOU CBO network template is available upon request. Parties interested in the Excel workbook should contact the Regulatory Affairs Tariffs department at [Tariffs@Socalgas.com](mailto:Tariffs@Socalgas.com).

*/s/ Joseph Mock*  
Joseph Mock  
Director – Regulatory Affairs

Attachments



# ADVICE LETTER SUMMARY

## ENERGY UTILITY



MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No.: Southern California Gas Company (U 904G)

Utility type:

- ELC       GAS       WATER  
 PLC       HEAT

Contact Person: Ray B. Ortiz

Phone #: (213) 244-3837

E-mail: ROrtiz@socalgas.com

E-mail Disposition Notice to: Tariffs@socalgas.com

### EXPLANATION OF UTILITY TYPE

ELC = Electric      GAS = Gas      WATER = Water  
 PLC = Pipeline      HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #: 5857, et al.

Tier Designation: 2

Subject of AL: Joint Community Based Organization (CBO) Reporting Template of SoCalGas, SDG&E, SCE, and PG&E Pursuant to Decision (D.) 21-06-036 Ordering Paragraph (OP) 8

Keywords (choose from CPUC listing): Compliance

AL Type:  Monthly  Quarterly  Annual  One-Time  Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #: D.21-06-036

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL: No

Summarize differences between the AL and the prior withdrawn or rejected AL: N/A

Confidential treatment requested?  Yes  No

If yes, specification of confidential information:

Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information:

Resolution required?  Yes  No

Requested effective date: 9/29/21

No. of tariff sheets: 0

Estimated system annual revenue effect (%): N/A

Estimated system average rate effect (%): N/A

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected: N/A

Service affected and changes proposed<sup>1</sup>: N/A

Pending advice letters that revise the same tariff sheets: N/A

<sup>1</sup>Discuss in AL if more space is needed.

**Protests and all other correspondence regarding this AL are due no later than 20 days after the date of this submittal, unless otherwise authorized by the Commission, and shall be sent to:**

CPUC, Energy Division  
Attention: Tariff Unit  
505 Van Ness Avenue  
San Francisco, CA 94102  
Email: [EDTariffUnit@cpuc.ca.gov](mailto:EDTariffUnit@cpuc.ca.gov)

Name: Rav B. Ortiz  
Title: Regulatory Tariff Manager  
Utility Name: Southern California Gas Company  
Address: 555 West Fifth Street, GT14D6  
City: Los Angeles  
State: California Zip: 90013-1011  
Telephone (xxx) xxx-xxxx: (213) 244-3837  
Facsimile (xxx) xxx-xxxx: (213) 244-4957  
Email: [ROrtiz@socalgas.com](mailto:ROrtiz@socalgas.com)

Name: SoCalGas Tariffs  
Title:  
Utility Name: Southern California Gas Company  
Address: 555 West Fifth Street, GT14D6  
City: Los Angeles  
State: California Zip: 90013-1011  
Telephone (xxx) xxx-xxxx: (213) 244-2837  
Facsimile (xxx) xxx-xxxx: (213) 244-4957  
Email: [Tariffs@socalgas.com](mailto:Tariffs@socalgas.com)

**ATTACHMENT A**

**Advice No. 5857, et al.**

**Joint IOU CBO Network Template**



**PG&E Gas and Electric  
Advice Submittal List  
General Order 96-B, Section IV**

AT&T  
Albion Power Company

Alta Power Group, LLC  
Anderson & Poole

Atlas ReFuel  
BART

Barkovich & Yap, Inc.  
California Cotton Ginners & Growers Assn  
California Energy Commission

California Hub for Energy Efficiency  
Financing

California Alternative Energy and  
Advanced Transportation Financing  
Authority  
California Public Utilities Commission  
Calpine

Cameron-Daniel, P.C.  
Casner, Steve  
Cenergy Power  
Center for Biological Diversity

Chevron Pipeline and Power  
City of Palo Alto

City of San Jose  
Clean Power Research  
Coast Economic Consulting  
Commercial Energy  
Crossborder Energy  
Crown Road Energy, LLC  
Davis Wright Tremaine LLP  
Day Carter Murphy

Dept of General Services  
Don Pickett & Associates, Inc.  
Douglass & Liddell

East Bay Community Energy Ellison  
Schneider & Harris LLP Energy  
Management Service  
Engineers and Scientists of California

GenOn Energy, Inc.  
Goodin, MacBride, Squeri, Schlotz &  
Ritchie

Green Power Institute  
Hanna & Morton  
ICF

IGS Energy  
International Power Technology  
Intestate Gas Services, Inc.  
Kelly Group  
Ken Bohn Consulting  
Keyes & Fox LLP  
Leviton Manufacturing Co., Inc.

Los Angeles County Integrated  
Waste Management Task Force  
MRW & Associates  
Manatt Phelps Phillips  
Marin Energy Authority  
McKenzie & Associates

Modesto Irrigation District  
NLine Energy, Inc.  
NRG Solar

OnGrid Solar  
Pacific Gas and Electric Company  
Peninsula Clean Energy

Pioneer Community Energy

Public Advocates Office

Redwood Coast Energy Authority  
Regulatory & Cogeneration Service, Inc.  
SCD Energy Solutions  
San Diego Gas & Electric Company

SPURR  
San Francisco Water Power and Sewer  
Sempra Utilities

Sierra Telephone Company, Inc.  
Southern California Edison Company  
Southern California Gas Company  
Spark Energy  
Sun Light & Power  
Sunshine Design  
Tecogen, Inc.  
TerraVerde Renewable Partners  
Tiger Natural Gas, Inc.

TransCanada  
Utility Cost Management  
Utility Power Solutions  
Water and Energy Consulting Wellhead  
Electric Company  
Western Manufactured Housing  
Communities Association (WMA)  
Yep Energy