

PUBLIC UTILITIES COMMISSION
505 Van Ness Avenue
San Francisco CA 94102-3298



Pacific Gas & Electric Company
ELC (Corp ID 39)
Status of Advice Letter 7193E
As of September 30, 2024

Subject: PG&E Advice Letter Detailing the Automated Response Technology Program, in Compliance with Decision 23-12-005

Division Assigned: Energy

Date Filed: 02-28-2024

Date to Calendar: 03-01-2024

Authorizing Documents: D2312005

Disposition:

Signed

Effective Date:

09-12-2024

Resolution Required: Yes

Resolution Number: E-5341

Commission Meeting Date: None

CPUC Contact Information:

edtariffunit@cpuc.ca.gov

AL Certificate Contact Information:

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PGETariffs@pge.com

PUBLIC UTILITIES COMMISSION
505 Van Ness Avenue
San Francisco CA 94102-3298



To: Energy Company Filing Advice Letter

From: Energy Division PAL Coordinator

Subject: Your Advice Letter Filing

The Energy Division of the California Public Utilities Commission has processed your recent Advice Letter (AL) filing and is returning an AL status certificate for your records.

The AL status certificate indicates:

- Advice Letter Number
- Name of Filer
- CPUC Corporate ID number of Filer
- Subject of Filing
- Date Filed
- Disposition of Filing (Accepted, Rejected, Withdrawn, etc.)
- Effective Date of Filing
- Other Miscellaneous Information (e.g., Resolution, if applicable, etc.)

The Energy Division has made no changes to your copy of the Advice Letter Filing; please review your Advice Letter Filing with the information contained in the AL status certificate, and update your Advice Letter and tariff records accordingly.

All inquiries to the California Public Utilities Commission on the status of your Advice Letter Filing will be answered by Energy Division staff based on the information contained in the Energy Division's PAL database from which the AL status certificate is generated. If you have any questions on this matter please contact the:

Energy Division's Tariff Unit by e-mail to
edtariffunit@cpuc.ca.gov



June 7, 2024

Advice 7193-E-A

(Pacific Gas and Electric Company ID U 39 E)

Public Utilities Commission of the State of California

Subject: Supplemental: PG&E Advice Letter Detailing the Automated Response Technology Program, in Compliance with Decision 23-12-005 and Decision 23-06-029

Purpose

Pacific Gas and Electric Company (PG&E) hereby submits this supplemental Tier 3 advice letter (AL), in compliance with Ordering Paragraph (OP) 25 of California Public Utilities Commission (Commission or CPUC) Decision (D.) 23-12-005, *Decision Directing Certain Investor-Owned Utilities' Demand Response Programs, Pilots, and Budgets for the Years 2024-2027* (Decision). The Decision required PG&E to submit a Tier 3 advice letter no later than February 28, 2024, detailing the full program characteristics of the Automated Response Technology (ART) program. This supplemental AL includes redlined tariff revisions to the E-ART Tariff ("the tariff"), in compliance with OP 30 of D.23-06-029, *Decision Adopting Local Capacity Obligations for 2024-2026, Flexible Capacity Obligations for 2024, and Program Refinements* from Rulemaking (R.) 21-10-002, to include additional availability requirements for Proxy Demand Response (PDR) resources. This supplemental AL is also submitted following a request from the Commission's Energy Division (ED) staff on May 28, 2024, and provides information incremental to PG&E's original ART AL (PGE Advice 7193-E).

Background

On December 20, 2023, the Commission issued D.23-12-005, *Decision Directing Certain Investor-Owned Utilities' Demand Response Programs, Pilots, and Budgets for the Years 2024-2027*. In D.23-12-005, the Commission noted that "PG&E's ART program is promising and has the potential to provide far greater return on ratepayer funds."¹ The Commission approved PG&E's ART program, and authorized PG&E to recover \$23.8 million for ART in 2024-2027.² PG&E is authorized to recover an additional \$20 million

¹ D.23-12-005, p. 63.

² D.23-12-005, OP 25.

for its ART program following submittal of a Tier 3 advice letter justifying additional budget for the ART program during the mid-cycle review process in 2025.³

In D.23-12-005, the Commission noted “PG&E’s proposal lacks in many specifics,”⁴ and noted PG&E would rely on the Request for Proposal (RFP) process to inform the program design.⁵ The Commission directed PG&E to submit a Tier 3 AL by February 28, 2024, detailing the program design, before proceeding with the ART program. To that end, PG&E provided the full details of the ART program in its Advice Letter 7193-E. In the interim, PG&E is authorized to utilize up to \$1.6 million of its allotted 2024 ART budget to transition customers from the Summer Reliability Smart Thermostat Control Pilot to the ART program. This initial \$1.6 million in funding was made available from January 1, 2024 to June 30, 2024, or until the ART program design is approved by the Commission.⁶

On May 28, 2024, PG&E received a request from ED to file a supplemental AL to 7193-E to clarify the original filing, as follows:

1. Confirm technology providers will offer support for more than one smart technology.
2. Provide additional detail regarding new systems needed to support ART and the timing of system development and availability.
3. Explain when ART will be expanded to other technologies beyond the smart thermostats transferred from the Summer Reliability Smart Control Thermostat program.
4. Identify how customers will know the different available incentives without having to solicit information from each Provider.
5. Clarify the meaning of “commission guidelines” in the “Subscription Limit” section of the tariff.
6. Explain how PG&E will avoid underutilization of all available smart customer devices in a situation where a Provider enrolls a customer in ART with one smart device (i.e smart controllable thermostat) without having access to the customer’s other smart devices (i.e battery storage device or EV charger).
7. Clarify in the tariff whether the customer is required to be on a time-varying rate and to also participate in CAISO markets.
8. Include the cap on the number of dispatches per day. If there are none, clarify in the tariff.
9. Include the cap on the number of consecutive days of dispatch. If there are none, clarify in the tariff.
10. Adopt the requirements of D.29-06-029, OP 30, to include additional availability requirements for PDR resources in the proposed tariff.

³ D.23-12-005, OP 25.

⁴ D.23-12-005, pg. 65.

⁵ *PG&E’s Direct Testimony in Support of 2023-2027 Demand Response Programs*, A.22-20-005, at p. 2-21. <https://docs.cpuc.ca.gov/PublishedDocs/SupDoc/A2205002/6051/508571690.pdf>

⁶ D.23-12-005, OP 25.

11. Clarify whether the capacity payments under the “Rates” section in the tariff is to the Provider and explain how individual customers will be paid by their contracted Provider.
12. Identify the minimum CAISO PDR kW requirements for the program Providers.
13. Clarify Providers’ responsibility and timeline to provide notice of events to their customers.
14. Explain how PG&E will ensure program performance, given this is a resource adequacy (RA) eligible, voluntary program with no penalties.

PG&E herein provides additional details and clarifications on the ART program details, as requested.

Clarifying Details of the Automated Response Technology Program

Below, PG&E provides responses to the ED requests listed above, as well as the location in the E-ART tariff where these adjustments for clarity have been made, if applicable. These clarifications include ART program details incremental to those included in AL 7193-E.

ED Request #	Change Requested	Clarification	Tariff Section	Sheet #
1	Confirm technology providers will offer support for more than one smart technology.	A customer with more than one technology will be able to enroll any eligible smart technology that their Provider supports. Providers will be encouraged to contract with common technology manufacturers to ensure customers with multiple technologies can enroll them. PG&E cannot mandate third-party Providers to enter into contracts with specific technology vendors.	N/A	N/A
2	Provide additional detail regarding new systems needed to support ART and the timing of system development and availability.	PG&E will leverage its distributed energy resource management system (DERMS) beginning in 2025 to facilitate customer eligibility checks, enroll/disenroll operations, and dispatch events for the ART program. Development will begin in 2024 and continue in 2025. PG&E has the capability to dispatch the ART program as soon the ART tariff is approved and the first contract is executed.	N/A	N/A

3	Explain when ART will be expanded to other technologies beyond the smart thermostats transferred from the Summer Reliability Smart Control Thermostat program.	The ART program can expand to other technologies as soon as ART is approved.	N/A	N/A
4	Identify how customers will know the different available incentives without having to solicit information from each Provider.	Customers will have to research incentives offered under Provider programs. PG&E will not require Providers to report incentives that they pay or offer to customers. Providers may have different approaches to rewarding customers for their participation (which could change frequently), including gift cards, or a reward system that does not include traditional incentives. PG&E is unable to compile and provide a list of the Providers' incentives because this flexibility is left up to the Provider.	N/A	N/A
5	Clarify the meaning of "Commission guidelines" in the "Subscription Limit" section of the tariff.	The reference to "Commission guidelines," is meant to refer to the Commission's jurisdiction. PG&E revised the proposed E-ART tariff to now convey that Subscription Limits are subject to "CPUC authorization and funding."	Subscription Limit	1
6	Explain how PG&E will avoid underutilization of all available smart customer devices in a situation where a Provider enrolls a customer in ART with one smart device (i.e. smart controllable thermostat) without having access to the customer's other smart devices (i.e. battery storage device or EV charger).	<p>PG&E cannot dictate contractual relationships between Providers and technology manufacturers. There are a few strategies PG&E can implement to monitor for devices on the service premises which are operated by a different Provider than the Provider with the customer enrolled in ART.</p> <p>PG&E will actively solicit the participation of Providers with multiple technologies and will consider partnerships. PG&E will monitor customers on rates associated with EV and battery and not in the program but located at enrolled service premises. PG&E will conduct participant educational campaigns to promote higher load technology participation, when those options exist. And PG&E will conduct surveys of participants to query for other technologies in the home.</p>	N/A	N/A

7	Clarify in the tariff whether the customer is required to be on a time-varying rate and to also participate in CAISO markets.	<p>It is not an ART program requirement for customers to be on a Time-Of-Use (TOU) rate. PG&E has revised the proposed E-ART tariff to insert, "Regardless of daily load shifting, all customers will be included in DR events."</p> <p>As stated in the tariff, PG&E will bid the ART program into the CAISO market.</p>	Rates	2
8	Include the cap on the number of dispatches per day. If there are none, clarify in the tariff.	PG&E has revised the proposed E-ART tariff to insert, "There is no limit on the number of dispatches in a day or consecutive days of dispatch."	Availability, Triggers & Notification	4
9	Include the cap on the number of consecutive days of dispatch. If there are none, clarify in the tariff.	PG&E has revised the proposed E-ART tariff to insert, "There is no limit on the number of dispatches in a day or consecutive days of dispatch."	Availability, Triggers & Notification	4
10	Adopt the requirements of D.23-06-029, OP 30, to include additional availability requirements for PDR resources in the tariff.	PG&E has revised the proposed E-ART tariff to insert language required by D.23-06-029, OP 30: "Schedule E-ART will be available for dispatch for the duration of CAISO Flex Alerts, Grid Warning, Alerts or Notices, or when the Governor's Office issues an emergency notice. Schedule-ART will be available for the duration of an Alert, Warning, or Notice that is issued prior and up to the 10 a.m. day-ahead market bid deadline."	Availability, Triggers & Notification	4
11	Clarify whether the capacity payments under the "Rates" section in the tariff is to the Provider, and explain how individual customers will be paid by their contracted Provider.	<p>PG&E has revised the proposed E-ART tariff to insert, "Incentive payments to participating customers are the responsibility of and at the discretion of Providers."</p> <p>PG&E also previously stated in the AL, "PG&E will conduct an analysis of each Provider's Portfolio once per month based on the active service agreements enrolled in PG&E's system in order to calculate Provider incentive payments, referred to as Capacity Payments."</p>	<p>Rates</p> <p>Capacity Payments</p>	6

12	Identify the minimum CAISO PDR kW requirements for the program Providers.	PG&E has revised the proposed E-ART tariff to insert a new last paragraph, "There is no minimum CAISO PDR kW requirements for ART Providers. CAISO PDR resources must meet a 100kW minimum size requirement and PG&E, as the Scheduling Coordinator, will combine customers from multiple Providers to achieve the requirement."	Customer Eligibility	3
13	Clarify Providers' responsibility and timeline to provide notice of events to their customers	PG&E revised the proposed E-ART tariff as follows, "For Day-Ahead market-events, PG&E will notify the Providers after awards are received, but no later than 5:00 pm the day before dispatch or as soon as reasonably possible. For Day-Ahead test events, PG&E will notify the Providers by 5:00 p.m. For Day-Of emergency and near emergency events, PG&E will notify Providers as soon as possible, but no later than 1 hour after being informed of dispatch. Notification to customers and the timeline to notify customers is the responsibility of the Providers.	Availability, Triggers & Notification	4
14	Explain how PG&E will ensure program performance, given this is a resource adequacy (RA) eligible, voluntary program with no penalties.	<p>To ensure program performance, functionality within the DERMS will conduct forecasting and performance measurement. Performance measurement will inform forecasting with continuous learning from previous events (actual market awards, and test events) to ensure forecast accuracy.</p> <p>In addition, annual Load Impact Protocols (LIP) will be used to improve upon expected MW delivery from the ART program. Providers will be given feedback to improve upon the MW portfolio expectations.</p>	N/A	N/A

PG&E provides the updated E-ART tariff for consideration in redline and clean form as Attachments A and B, respectively. This submittal completely replaces the E-ART tariff submitted in AL 7193-E.

Conclusion

PG&E appreciates the Commission's recognition of "the importance of ART in PG&E's portfolio".⁷ In order to support the swift launch of the ART program and enable the availability of this new offering during what is expected to be a hotter than average⁸ 2024 summer season, PG&E respectfully requests expeditious resolution of this AL and AL 7193-E: (1) approving launch of the ART program, and (2) authorizing the submission of additional ALs, if necessary, to conform ART program operations and the new ART tariff to a Resolution.

Protests

To expedite the launch of the ART program and ensure its availability to customers this summer, PG&E is requesting a shortened protest period. Anyone wishing to protest this submittal may do so by letter sent electronically via E-mail, no later than June 17, 2024, which is 10 days after the date of this submittal. Protests must be submitted to:

CPUC Energy Division
ED Tariff Unit
E-mail: EDTariffUnit@cpuc.ca.gov

The protest shall also be electronically sent to PG&E via E-mail at the address shown below on the same date it is electronically delivered to the Commission:

Sidney Bob Dietz II
Director, Regulatory Relations
c/o Megan Lawson
E-mail: PGETariffs@pge.com

Any person (including individuals, groups, or organizations) may protest or respond to an advice letter (General Order 96-B, Section 7.4). The protest shall contain the following information: specification of the advice letter protested; grounds for the protest; supporting factual information or legal argument; name and e-mail address of the protestant; and statement that the protest was sent to the utility no later than the day on which the protest was submitted to the reviewing Industry Division (General Order 96-B, Section 3.11).

Effective Date

Pursuant to General Order (GO) 96-B, Rule 5.3, and OP 25 of D.23-12-005, this advice letter is submitted with a Tier 3 designation. PG&E requests that this Tier 3 advice submittal become effective upon Commission approval.

⁷ D.23-12-005, p. 66.

⁸ National Oceanic and Atmospheric Administration (NOAA) Climate Prediction Center Seasonal Temperature Outlook issued May 16, 2024.

Notice

In accordance with General Order 96-B, Section IV, a copy of this advice letter is being sent electronically to parties shown on the attached list and the parties on the service list for A.22-05-002. Address changes to the General Order 96-B service list should be directed to PG&E at email address PGETariffs@pge.com. For changes to any other service list, please contact the Commission's Process Office at (415) 703-2021 or at Process_Office@cpuc.ca.gov. Send all electronic approvals to PGETariffs@pge.com. Advice letter submittals can also be accessed electronically at: <http://www.pge.com/tariffs/>.

/S/

Sidney Bob Dietz II
Director, Regulatory Relations
CPUC Communications

Attachments:

Attachment A – Redlined E-ART Tariff (vs. Advice 7193-E)
Attachment B – Clean E-ART Tariff

cc: Service List A.22-05-002



ADVICE LETTER SUMMARY

ENERGY UTILITY



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

Company name/CPUC Utility No.: Pacific Gas and Electric Company (ID U39 E)

Utility type:

☒ ELC ☐ GAS ☐ WATER
☐ PLC ☐ HEAT

Contact Person: Kimberly Loo

Phone #: (279)789-6209

E-mail: PGETariffs@pge.com

E-mail Disposition Notice to: KELM@pge.com

EXPLANATION OF UTILITY TYPE

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

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #: 7193-E-A

Tier Designation: 3

Subject of AL: Supplemental: PG&E Advice Letter Detailing the Automated Response Technology Program, in Compliance with Decision 23-12-005

Keywords (choose from CPUC listing): Compliance, Demand Response

AL Type: ☐ Monthly ☐ Quarterly ☐ Annual ☒ One-Time ☐ Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #: D.23-12-005

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:

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:

No. of tariff sheets: 9

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: See Attachment B

Service affected and changes proposed¹: N/A

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

¹Discuss in AL if more space is needed.

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

California Public Utilities Commission
Energy Division Tariff Unit Email:
EDTariffUnit@cpuc.ca.gov

Contact Name: Sidnev Bob Dietz II. c/o Megan Lawson
Title: Director, Regulatory Relations
Utility/Entity Name: Pacific Gas and Electric Company

Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email: PGETariffs@pge.com

Contact Name:
Title:
Utility/Entity Name:

Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email:

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

Clear Form

Attachment A

Redlined E-ART Tariff (vs. Advice 7193-E)



ELECTRIC SCHEDULE E-ART
AUTOMATED RESPONSE TECHNOLOGY PROGRAM

Sheet 1

(N)
(N)

APPLICABILITY: The Automated Response Technology (ART) program is a voluntary residential demand response program that offers third-party "Providers" incentives for reducing energy consumption when requested by PG&E through the dispatch of smart technologies, also known as distributed energy resources (DERs). When aggregated together, DERs have the potential to serve as a virtual power plant (VPP) and provide valuable grid services. The ART program integrated into the California Independent System Operators (CAISO) wholesale market as a Proxy Demand Resource (PDR) and PG&E will bid the program resources at its sole discretion. The PDR models the physical characteristics of a resource supplied to the CAISO and is the basis for bidding, awards, dispatch, outages, and settlements. ART PDRs must comply with the current CAISO Tariff requirements on market participation.

(N)

TERRITORY: This Schedule (Schedule E-ART or Schedule) is available throughout PG&E's electric service area.

SUBSCRIPTION LIMIT: PG&E reserves the right to limit the number of Providers and enrolled customers that participate in Schedule E-ART, consistent with Commission [guidelines authorization and funding](#).

PROVIDER: Customers with smart technologies can enroll under this Schedule through a PG&E-contracted Provider. A Provider is a PG&E-contracted entity which can be chosen by a customer to act on behalf of the customer with respect to all aspects of this Schedule including, but not limited to (1) enrollment and disenrollment; (2) event notifications; (3) incentive payments; and (4) scheduling updates which may impact the customer.

PROVIDER CONTRACT TERM: The minimum term of a contract between PG&E and Providers is for a twelve (12)-month period. Customers enrolled in the ART program by a Provider will be disenrolled from ART upon the conclusion of that Provider's contract term, if not renewed.

(N)

(Continued)

Advice 7193-E
Decision D.23-12-005

Issued by
Shilpa Ramaiya
Vice President
Regulatory Proceedings and Rates

Submitted February 28, 2024
Effective
Resolution



ELECTRIC SCHEDULE E-ART
AUTOMATED RESPONSE TECHNOLOGY PROGRAM

Sheet 2

(N)
(N)

**PROVIDER'S
PORTFOLIO:**

Providers may use multiple types of smart technologies in their portfolios to reduce load when dispatched. ART Provider incentives are paid on a performance basis as measured at PG&E's meter level and aggregated to the Provider's portfolio based on actual events or test events.

(N)

Providers will integrate into PG&E's system via bi-directional Application Programming Interface (API) for the purpose of determining customer eligibility and for updates to the enrollment status. PG&E's system will provide confirmation of eligibility in a standard format via Application Programming Interface (API) and will provide updates to that eligibility should they change. PG&E will include the Sub-Load Aggregation Point (Sub-LAP) on a per customer basis. PG&E may provide a more granular level designation for particularly constrained distribution areas. Provider must ensure dispatch availability at these levels.

**REQUIREMENTS
FOR CUSTOMERS
ON A TIME
VARYING RATE:**

If a customer is on a time-varying rate, the Provider must implement a daily load-shifting strategy during the hours with time-varying rates using the automated technology. The customer has the option to opt out ~~out of~~ the daily load shifting strategy, which- cCurrently, this applies to TOU rates and in the future could apply to real time pricing (RTP). Regardless of daily load shifting, all customers will be included in DR events.

**CUSTOMER
ACCEPTANCE OF
TERMS &
CONDITIONS:**

Customers will be required to accept the program terms and conditions at the time of enrollment. Customers must submit disenrollment requests with their Provider and the Provider will transmit the disenrollment to PG&E via API. A customer will be automatically disenrolled in PG&E's system when their service account is no longer active and that disenrollment will be transmitted to the Provider via API. In the event of a CAISO location registration dispute with another supply-side program, the earliest enrollment date will dictate which program retains the customer. Any disputes arising between Provider and a customer shall be resolved by the Provider and customer.

(N)

(Continued)

Advice 7193-E
Decision D.23-12-005

Issued by
Shilpa Ramaiya
Vice President

Regulatory Proceedings and Rates

Submitted
Effective
Resolution

February 28, 2024



ELECTRIC SCHEDULE E-ART
AUTOMATED RESPONSE TECHNOLOGY PROGRAM

Sheet 3

(N)
(N)

**CUSTOMER
ELIGIBILITY:**

Schedule E-ART is available to PG&E residential customers receiving bundled service or Community Choice Aggregation (CCA) service and being billed on a PG&E residential rate schedule. An eligible customer must continue to take service under the provisions of its otherwise applicable schedule (OAS). Providers participating in Schedule E-ART must comply with the terms of this Schedule and associated agreements. Customers cannot simultaneously be enrolled in another supply-side demand response pilot or program offered by PG&E, third-party DR provider (DRP), CCA, or an event-based load modifying program offered by PG&E.

(N)

Customer enrollment is limited to one Provider per eligible customer service agreement. Multiple Providers are not able to enroll the same customer service agreement.

PG&E must be able to register customers' service agreements who are participating under Schedule E-ART into the CAISO Demand Response Registration System (DRRS), which requires Load Serving Entity (LSE) approval. If PG&E is unable to register the customer's service agreement and/or the customer's LSE does not allow the customer's service agreement to be registered, then the customer will be ineligible to participate under Schedule E-ART.

In accordance with CAISO requirements, at least 90 calendar days of historic interval meter data using metering equipment (including telephone line, cellular, or radio control communication device) must be submitted to CAISO for each service agreement, prior to that service agreement participating in Schedule E-ART. The meter data must be Revenue Quality Meter Data (RQMD).

There is no minimum CAISO PDR kW requirements for ART Providers. CAISO PDR resources must meet a 100kW minimum size requirement and PG&E, as the Scheduling Coordinator, will combine customers from multiple Providers to achieve the requirement.

**AVAILABILITY,
TRIGGERS &
NOTIFICATION:**

Schedule E-ART is available every month of the year, 24 hours-a-day, seven days a week.

Triggers shall be Day-Ahead, based on the California Independent System Operator (CAISO) market award dispatch, or Day-Of for PG&E system emergencies or near-emergencies for distribution service. Schedule E-ART will be available for dispatch for the duration of CAISO Flex Alerts, Grid Warning, Alerts or Notices, or the Governor's Office has an emergency notice. Schedule-ART be available for the duration of an Alert, Warning, or Notice that is issued prior and up to the 10 a.m. day-ahead market bid deadline.

Total demand response event hours per service agreement can be up to six (6) hours in a day. There is no limit on the number of dispatches in a day or on consecutive days of dispatch.

(Continued)



ELECTRIC SCHEDULE E-ART
AUTOMATED RESPONSE TECHNOLOGY PROGRAM

Sheet 3

(N)
(N)

All operating months begin and end at the beginning and ending of its corresponding calendar month.

|
(N)

For Day-Ahead market events, PG&E will notify the Providers ~~by 5:00 p.m. after awards are received, but no later than 5 p.m. the day before dispatch,~~ or as soon as reasonably possible. For Day-Ahead test events, PG&E will notify the Providers by 5:00 p.m. For Day-Of emergency and near emergency events, PG&E will notify Providers as soon as possible, but no later than 1 hour after being informed of dispatch. Notification to customers and the timeline to notify customers is the responsibility of the Providers.

(Continued)

Advice 7193-E
Decision D.23-12-005

Issued by
Shilpa Ramaiya
Vice President
Regulatory Proceedings and Rates

Submitted
Effective
Resolution

February 28, 2024



Oakland, California

57424-E

(N)
(N)

(N)

The day-of adjustment is the ratio of a) the average load of the first three of the four hours prior to the start of the event to b) the average load of the corresponding hours from the service agreement baseline, as discussed above. The day-of adjustment will be limited to +/- 40% of each individual service agreement baseline in the group. The day-of adjustment is applied by multiplying each hourly baseline value by the day-of adjustment. The day-of adjustment will be applied by default per Customer unless the Provider elects to opt-out of this adjustment. If more than one event occurs on the same day, the day-of adjustment from the event with the earliest start time will be used for the individual service agreement's events that day requiring a day-of adjustment.

b. Capacity Payments

$$(\dot{N})$$

(Continued)

February 28, 2024



ELECTRIC SCHEDULE E-ART
AUTOMATED RESPONSE TECHNOLOGY PROGRAM

Sheet 5

(N)
(N)

**CAPACITY
PRICES:**

The following are Capacity Prices by month as \$/kW values:

(N)

<u>Jan</u>	<u>Feb</u>	<u>Mar</u>	<u>Apr</u>	<u>May</u>	<u>Jun</u>	<u>Jul</u>	<u>Aug</u>	<u>Sep</u>	<u>Oct</u>	<u>Nov</u>	<u>Dec</u>
\$2.60	\$2.12	\$1.57	\$2.79	\$7.45	\$12.27	\$12.15	\$27.66	\$28.83	\$13.55	\$2.84	\$6.18

**CAPACITY
PAYMENTS:**

PG&E will conduct an analysis of each Provider's Portfolio once per month based on the active service agreements enrolled in PG&E's system in order to calculate Provider incentive payments, referred to as Capacity Payments. Capacity Payments will be based on event performance as measured with PG&E's meter data. In the absence of economic, emergency, or near emergency event performance, test event performance will be used.

The analysis will begin on the first business day of a new month and will include service agreements enrolled through the last day of the prior month. The analysis will conclude by the 15th of the calendar month. Capacity Payments will be issued by PG&E by the last business day the calendar month. For service agreements with incomplete meter data, PG&E will issue a second payment once meter data is available and settlement for those service agreements is calculated. The following are the steps associated with Capacity Payment Calculation:

- Service agreement meter data will be compared to a customer's CSEB to determine the reduction in delivered energy to an enrolled customer's PG&E meter and defined as the load impact.
- The load impact for each event hour that a customer participated in will be assessed and averaged across the entire month to determine the Measured Average Hourly Load Impact. In instances where a customer's Measured Average Hourly Load Impact increases, the value for that customer will be zero.
- To determine Capacity Payments per Provider, Measured Average Hourly Load Impact per customer will be aggregated for the Provider's portfolio.

Monthly Capacity Price (per kW) x Aggregate Measured Average Hourly Load Impact

(N)

(Continued)

Advice 7193-E
Decision D.23-12-005

Issued by
Shilpa Ramaiya
Vice President
Regulatory Proceedings and Rates

Submitted February 28, 2024
Effective
Resolution



ELECTRIC SCHEDULE E-ART
AUTOMATED RESPONSE TECHNOLOGY PROGRAM

Sheet 6

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**PROGRAM
TESTING:**

PG&E will have the option to call up to one test event per month for resources that do not receive a market award in the given month, including weekends. The test event will be called to demonstrate capacity for the purpose of calculating Capacity Payments. A test event will not exceed three hours in duration. A test event would occur from the 20th day to the last day of a calendar month if unfavorable weather and grid conditions are forecast.

(N)

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TIALITY:**

PG&E will consider interactions and strategies with Provider to be confidential information, when PG&E and or the provider determines that the information exchanged constitutes or include confidential information. PG&E shall protect this confidential information from public disclosure, and shall not disclose such confidential information to unauthorized third parties, except for PG&E's employees, agents, counsel, accountants, advisors, individual customers who authorize the release of their customer information pursuant to an approved process (such as Electric Rule 24), utility contractors, or Commission staff/contractors who have a need to know such information and have agreed to keep such information confidential and except as provided otherwise in this section, or by operation of state law or regulation, or federal law or regulation.

PG&E will provide the Commission with confidential Provider information under Commission procedures for identifying and claiming confidential treatment. Release of confidential Provider information to utility and Commission contractors will be subject to such parties' agreement to protect the information from unauthorized use or public disclosure on terms consistent with PG&E and the Commission's rules and state or federal law or regulation.

(N)

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58118-E	ELECTRIC SCHEDULE E-ART AUTOMATED RESPONSE TECHNOLOGY PROGRAM Sheet 2	
58119-E	ELECTRIC SCHEDULE E-ART AUTOMATED RESPONSE TECHNOLOGY PROGRAM Sheet 3	
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ELECTRIC SCHEDULE E-ART
AUTOMATED RESPONSE TECHNOLOGY PROGRAM

Sheet 1

(N)
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APPLICABILITY: The Automated Response Technology (ART) program is a voluntary residential demand response program that offers third-party "Providers" incentives for reducing energy consumption when requested by PG&E through the dispatch of smart technologies, also known as distributed energy resources (DERs). When aggregated together, DERs have the potential to serve as a virtual power plant (VPP) and provide valuable grid services. The ART program integrated into the California Independent System Operators (CAISO) wholesale market as a Proxy Demand Resource (PDR) and PG&E will bid the program resources at its sole discretion. The PDR models the physical characteristics of a resource supplied to the CAISO and is the basis for bidding, awards, dispatch, outages, and settlements. ART PDRs must comply with the current CAISO Tariff requirements on market participation.

(N)

TERRITORY: This Schedule (Schedule E-ART or Schedule) is available throughout PG&E's electric service area.

SUBSCRIPTION LIMIT: PG&E reserves the right to limit the number of Providers and enrolled customers that participate in Schedule E-ART, consistent with Commission authorization and funding.

PROVIDER: Customers with smart technologies can enroll under this Schedule through a PG&E-contracted Provider. A Provider is a PG&E-contracted entity which can be chosen by a customer to act on behalf of the customer with respect to all aspects of this Schedule including, but not limited to (1) enrollment and disenrollment; (2) event notifications; (3) incentive payments; and (4) scheduling updates which may impact the customer.

PROVIDER CONTRACT TERM: The minimum term of a contract between PG&E and Providers is for a twelve (12)-month period. Customers enrolled in the ART program by a Provider will be disenrolled from ART upon the conclusion of that Provider's contract term, if not renewed.

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Sheet 2

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**PROVIDER'S
PORTFOLIO:**

Providers may use multiple types of smart technologies in their portfolios to reduce load when dispatched. ART Provider incentives are paid on a performance basis as measured at PG&E's meter level and aggregated to the Provider's portfolio based on actual events or test events.

(N)

Providers will integrate into PG&E's system via bi-directional Application Programming Interface (API) for the purpose of determining customer eligibility and for updates to the enrollment status. PG&E's system will provide confirmation of eligibility in a standard format via Application Programming Interface (API) and will provide updates to that eligibility should they change. PG&E will include the Sub-Load Aggregation Point (Sub-LAP) on a per customer basis. PG&E may provide a more granular level designation for particularly constrained distribution areas. Provider must ensure dispatch availability at these levels.

**REQUIREMENTS
FOR
CUSTOMERS ON
A TIME VARYING
RATE:**

If a customer is on a time-varying rate, the Provider must implement a daily load-shifting strategy during the hours with time-varying rates using the automated technology. The customer has the option to opt out of the daily load shifting strategy, which currently applies to TOU rates and in the future could apply to real time pricing (RTP). Regardless of daily load shifting, all customers will be included in DR events.

**CUSTOMER
ACCEPTANCE
OF TERMS &
CONDITIONS:**

Customers will be required to accept the program terms and conditions at the time of enrollment. Customers must submit disenrollment requests with their Provider and the Provider will transmit the disenrollment to PG&E via API. A customer will be automatically disenrolled in PG&E's system when their service account is no longer active and that disenrollment will be transmitted to the Provider via API. In the event of a CAISO location registration dispute with another supply-side program, the earliest enrollment date will dictate which program retains the customer. Any disputes arising between Provider and a customer shall be resolved by the Provider and customer.

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ELECTRIC SCHEDULE E-ART
AUTOMATED RESPONSE TECHNOLOGY PROGRAM

Sheet 3

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**CUSTOMER
ELIGIBILITY:**

Schedule E-ART is available to PG&E residential customers receiving bundled service or Community Choice Aggregation (CCA) service and being billed on a PG&E residential rate schedule. An eligible customer must continue to take service under the provisions of its otherwise applicable schedule (OAS). Providers participating in Schedule E-ART must comply with the terms of this Schedule and associated agreements. Customers cannot simultaneously be enrolled in another supply-side demand response pilot or program offered by PG&E, third-party DR provider (DRP), CCA, or an event-based load modifying program offered by PG&E.

Customer enrollment is limited to one Provider per eligible customer service agreement. Multiple Providers are not able to enroll the same customer service agreement.

PG&E must be able to register customers' service agreements who are participating under Schedule E-ART into the CAISO Demand Response Registration System (DRRS), which requires Load Serving Entity (LSE) approval. If PG&E is unable to register the customer's service agreement and/or the customer's LSE does not allow the customer's service agreement to be registered, then the customer will be ineligible to participate under Schedule E-ART.

In accordance with CAISO requirements, at least 90 calendar days of historic interval meter data using metering equipment (including telephone line, cellular, or radio control communication device) must be submitted to CAISO for each service agreement, prior to that service agreement participating in Schedule E-ART. The meter data must be Revenue Quality Meter Data (RQMD).

There is no minimum CAISO PDR kW requirements for ART Providers. CAISO PDR resources must meet a 100kW minimum size requirement and PG&E, as the Scheduling Coordinator, will combine customers from multiple Providers to achieve the requirement.

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Oakland, California

58120-E

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For Day-Ahead market events, PG&E will notify the Providers after awards are received, but no later than 5 p.m. the day before dispatch, or as soon as reasonably possible. For Day-Ahead test events, PG&E will notify the Providers by 5:00 p.m. For Day-Of emergency and near emergency events, PG&E will notify Providers as soon as possible, but no later than 1 hour after being informed of dispatch. Notification to customers and the timeline to notify customers is the responsibility of the Providers.

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ELECTRIC SCHEDULE E-ART
AUTOMATED RESPONSE TECHNOLOGY PROGRAM

Sheet 5

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**CUSTOMER
SPECIFIC
ENERGY
BASELINE:**

To participate under Schedule E-ART, a customer must have ten calendar days of meter data prior to the first day of program enrollment to calculate a valid Customer Specific Energy Baseline (CSEB).

(N)

Each provider's portfolio will have its own CSEB based on the aggregated CSEBs of each customer within the resource. The CSEB on any given day during the program is the sum total of the individual baselines of each service agreement in the portfolio. The program will utilize a 5-in-10 baseline with an optional same-day adjustment. For events that occur on weekdays, each individual service agreement baseline is the average load for each corresponding hour over the five (5) out of ten (10) past similar weekdays prior to an event with the highest energy consumed over the event period. The load during each corresponding hour of the five days will be averaged to calculate a baseline for each hour. For events that occur on weekends, each individual service agreement baseline is the weighted average load for each corresponding hour over the three (3) out of five (5) past similar weekends prior to an event with the highest energy consumed over the event period, with weights of 50-, 30-, and 20-percent applied to the baseline days in order by most recent. Similar weekdays will include Monday through Friday and similar weekends will include Saturday, Sunday, and NERC holidays. Days prior to the event in which the customer was: 1) subject to an event; 2) subject to an outage; or 3) was interrupted will be excluded from the baseline.

The day-of adjustment is the ratio of a) the average load of the first three of the four hours prior to the start of the event to b) the average load of the corresponding hours from the service agreement baseline, as discussed above. The day-of adjustment will be limited to +/- 40% of each individual service agreement baseline in the group. The day-of adjustment is applied by multiplying each hourly baseline value by the day-of adjustment. The day-of adjustment will be applied by default per Customer unless the Provider elects to opt-out of this adjustment. If more than one event occurs on the same day, the day-of adjustment from the event with the earliest start time will be used for the individual service agreement's events that day requiring a day-of adjustment.

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ELECTRIC SCHEDULE E-ART
AUTOMATED RESPONSE TECHNOLOGY PROGRAM

Sheet 6

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RATES: The payments to Providers under this rate schedule will be determined from the following components:

(N)

a. Capacity Prices

b. Capacity Payments

Incentive payments to participating customers are the responsibility of and at the discretion of Providers.

CAPACITY PRICES: The following are Capacity Prices by month as \$/kW values:

<u>Jan</u>	<u>Feb</u>	<u>Mar</u>	<u>Apr</u>	<u>May</u>	<u>Jun</u>	<u>Jul</u>	<u>Aug</u>	<u>Sep</u>	<u>Oct</u>	<u>Nov</u>	<u>Dec</u>
\$2.60	\$2.12	\$1.57	\$2.79	\$7.45	\$12.27	\$12.15	\$27.66	\$28.83	\$13.55	\$2.84	\$6.18

CAPACITY PAYMENTS: PG&E will conduct an analysis of each Provider's Portfolio once per month based on the active service agreements enrolled in PG&E's system in order to calculate Provider incentive payments, referred to as Capacity Payments. Capacity Payments will be based on event performance as measured with PG&E's meter data. In the absence of economic, emergency, or near emergency event performance, test event performance will be used.

The analysis will begin on the first business day of a new month and will include service agreements enrolled through the last day of the prior month. The analysis will conclude by the 15th of the calendar month. Capacity Payments will be issued by PG&E by the last business day the calendar month. For service agreements with incomplete meter data, PG&E will issue a second payment once meter data is available and settlement for those service agreements is calculated.

- Service agreement meter data will be compared to a customer's CSEB to determine the reduction in delivered energy to an enrolled customer's PG&E meter and defined as the load impact.
- The load impact for each event hour that a customer participated in will be assessed and averaged across the entire month to determine the Measured Average Hourly Load Impact. In instances where a customer's Measured Average Hourly Load Impact increases, the value for that customer will be zero.
- To determine Capacity Payments per Provider, Measured Average Hourly Load Impact per customer will be aggregated for the Provider's portfolio.

Monthly Capacity Price (per kW) x Aggregate Measured Average Hourly Load Impact

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**PG&E Gas and Electric
Advice Submittal List
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AT&T	East Bay Community Energy	Pacific Gas and Electric Company
Albion Power Company	Ellison Schneider & Harris LLP	Peninsula Clean Energy
Alta Power Group, LLC	Electrical Power Systems, Inc.	Pioneer Community Energy
	Fresno	
Anderson & Poole	Engineers and Scientists of California	Public Advocates Office
Atlas ReFuel BART		Redwood Coast Energy Authority
	GenOn Energy, Inc.	Regulatory & Cogeneration Service, Inc.
BART	Green Power Institute	Resource Innovations
Buchalter		Rockpoint Gas Storage
Barkovich & Yap, Inc.	Hanna & Morton LLP	SCD Energy Solutions
Braun Blaising Smith Wynne, P.C.		San Diego Gas & Electric Company
	ICF consulting	SPURR
California Community Choice Association	iCommLaw	San Francisco Water Power and Sewer
California Cotton Ginners & Growers Association	International Power Technology	Sempra Utilities
California Energy Commission	Intertie	Sierra Telephone Company, Inc.
California Hub for Energy Efficiency	Intestate Gas Services, Inc.	Southern California Edison Company
California Alternative Energy and Advanced Transportation Financing Authority		Southern California Gas Company
California Public Utilities Commission	Kelly Group	Spark Energy
Calpine	Ken Bohn Consulting	Sun Light & Power
Cameron-Daniel, P.C.	Keyes & Fox LLP	Sunshine Design
Casner, Steve		Stoel Rives LLP
Center for Biological Diversity	Leviton Manufacturing Co., Inc.	Tecogen, Inc.
Chevron Pipeline and Power	Los Angeles County Integrated	TerraVerde Renewable Partners
City of Palo Alto		Tiger Natural Gas, Inc.
City of San Jose	Waste Management Task Force	TransCanada
Clean Power Research	MRW & Associates	
Coast Economic Consulting	Manatt Phelps Phillips	Utility Cost Management
Commercial Energy	Marin Energy Authority	Utility Power Solutions
Crossborder Energy	McClintock IP	
Crown Road Energy, LLC	McKenzie & Associates	Water and Energy Consulting
Communities Association (WMA)	Modesto Irrigation District	Wellhead Electric Company
Davis Wright Tremaine LLP		Western Manufactured Housing Communities Association (WMA)
	NOSSAMAN LLP	
Day Carter Murphy	NRG Solar	Yep Energy
Dept of General Services		
Douglass & Liddell	OnGrid Solar	
Downey Brand LLP		
Dish Wireless L.L.C.		