



Joseph Mock
Director
Regulatory Affairs

555 W. Fifth Street, GT14D6
Los Angeles, CA 90013-1011
Tel: 213.244.3718
Fax: 213.244.4957
JMock@socalgas.com

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.¹

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.² In response, on April

¹ D.21-06-036 at OP 8.

² 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.³ 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, 2021.⁴

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.⁵

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.⁶

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.⁷ 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.⁸

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

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>.

³ Res. M-4842, available at:

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

⁴ *Id.* at 4.

⁵ Res. M-4849 at OP 5.

⁶ Rulemaking 21-02-014.

⁷ D.21-06-036 at OP 1.

⁸ *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.⁹ The Joint IOU CBO network template is presented in Attachment A of this AL.¹⁰

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.¹¹

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.¹² 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

⁹ 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.")

¹⁰ 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.

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

¹² 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."¹³

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.¹⁴

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). 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
E-mail: Tariffs@socalgas.com

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

¹⁴ *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 and
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

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

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

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 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.

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.

/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 proposed¹: N/A

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

¹Discuss 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

Name: Ray 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

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

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	East Bay Community Energy Ellison	Pioneer Community Energy
Albion Power Company	Schneider & Harris LLP Energy	Public Advocates Office
	Management Service	
Alta Power Group, LLC	Engineers and Scientists of California	Redwood Coast Energy Authority
Anderson & Poole		Regulatory & Cogeneration Service, Inc.
		SCD Energy Solutions
Atlas ReFuel	GenOn Energy, Inc.	San Diego Gas & Electric Company
BART	Goodin, MacBride, Squeri, Schlotz & Ritchie	
	Green Power Institute	SPURR
Barkovich & Yap, Inc.	Hanna & Morton	San Francisco Water Power and Sewer
California Cotton Ginners & Growers Assn	ICF	Sempra Utilities
California Energy Commission	IGS Energy	
	International Power Technology	Sierra Telephone Company, Inc.
California Hub for Energy Efficiency	Intestate Gas Services, Inc.	Southern California Edison Company
Financing	Kelly Group	Southern California Gas Company
California Alternative Energy and	Ken Bohn Consulting	Spark Energy
Advanced Transportation Financing	Keyes & Fox LLP	Sun Light & Power
Authority	Leviton Manufacturing Co., Inc.	Sunshine Design
California Public Utilities Commission		Tecogen, Inc.
Calpine	Los Angeles County Integrated	TerraVerde Renewable Partners
	Waste Management Task Force	Tiger Natural Gas, Inc.
Cameron-Daniel, P.C.	MRW & Associates	
Casner, Steve	Manatt Phelps Phillips	TransCanada
Cenergy Power	Marin Energy Authority	Utility Cost Management
Center for Biological Diversity	McKenzie & Associates	Utility Power Solutions
		Water and Energy Consulting Wellhead
Chevron Pipeline and Power	Modesto Irrigation District	Electric Company
City of Palo Alto	NLine Energy, Inc.	Western Manufactured Housing
	NRG Solar	Communities Association (WMA)
City of San Jose		Yep Energy
Clean Power Research	OnGrid Solar	
Coast Economic Consulting	Pacific Gas and Electric Company	
Commercial Energy	Peninsula Clean Energy	
Crossborder Energy		
Crown Road Energy, LLC		
Davis Wright Tremaine LLP		
Day Carter Murphy		
Dept of General Services		
Don Pickett & Associates, Inc.		
Douglass & Liddell		