
April 6, 2026

ADVICE 5784-E
(Southern California Edison Company - U 338-E)

ADVICE 7884-E
(Pacific Gas and Electric Company – U 39-E)

ADVICE 4818-E
(San Diego Gas & Electric Company – U 902-E)

ADVICE 291-E
(Liberty Utilities (CalPeco Electric) LLC – U 933-E)

ADVICE 542-E
(Bear Valley Electric Service Inc – 913-E)

ADVICE 790-E
(PacifiCorp d/b/a Pacific Power – U 901-E)

PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA
ENERGY DIVISION

SUBJECT: Establishment of the Joint Investor-Owned Utilities Technical Assistance Program Handbook Pursuant to Decision 25-12-005

PURPOSE

In compliance with Ordering Paragraph (OP) 2 of the Track 1 Decision (D.)25-12-005 in the Transportation Electrification Policy and Infrastructure (TEPI) Rulemaking (R.23-12-008), Southern California Edison Company (SCE) hereby submits the draft Technical Assistance (TA) Services Program Handbook, listed as Attachment 1 and attached hereto, on behalf of the joint investor-owned utilities (IOUs).¹

BACKGROUND

¹ Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), Liberty Utilities (CalPeco Electric) LLC, Bear Valley Electric Service Inc., and PacifiCorp d/b/a Pacific Power.

In November 2022, the CPUC issued Decision (D.) 22-11-040 in the Development of Rates and Infrastructure for Vehicle Electrification (DRIVE) Rulemaking (R. 18-12-006), which adopted a long-term TE policy framework that included a five-year, third-party administered statewide transportation electrification (TE) infrastructure rebate program referred to as Funding Cycle One Behind-the-Meter (FC1 BTM) TE Rebate Program, an IOU-administered Technical Assistance (TA) Program, and a pilot program called Locally Invested Transportation Equity (LITE), with a total budget of \$1 billion over five years.

On February 28, 2024, pursuant to OP 6 of D.22-11-040, the IOUs hosted a virtual public workshop to inform and discuss the scope of the Technical Assistance (TA) Services program. OP 6 also required the IOUs to develop a workshop report covering the TA Services workshop and serve the report on the service list along with a draft Program Handbook and additional FC1 BTM TE Rebate Program workshop reports.

On December 20, 2023, the CPUC opened the TEPI Rulemaking and closed the DRIVE Rulemaking.

On April 12, 2024, a Scoping Memo and Ruling in the TEPI Rulemaking was issued and among other items, paused the implementation of the FC1 BTM TE Rebate Program pending a reassessment by the Commission to determine whether ratepayer support for the FC1 BTM TE Rebate Program, including Marketing, Education and Outreach (ME&O) and the LITE program was needed or whether ratepayer funds needed to be refocused to “resolve the most impactful barriers to accelerating transportation electrification, such as upgrades to utilities’ distribution grid.”² The Ruling also clarified that Track 1 would not reassess other parts of D.22-11-040, such as the TA Services program.

On December 4, 2025, D.25-12-005 was issued. OP 2 ordered the utilities to (1) resume implementation of the TA Services Program, now separated from the paused FC1 BTM Rebate Program, with an authorized budget of \$36 million over three years, (2) hold a new public workshop for development of the TA Program Handbook, and (3) submit the draft TA Program Handbook via a Tier 3 Advice Letter. The Decision also directed the large IOUs to choose one utility as the program administrator for the purpose of coordinating the submitting the TA Program Handbook Tier 3 advice letter and clarified that all IOUs will implement TA Services for their own territories.³

On December 16, 2024, Energy Division granted SDG&E’s request, submitted on behalf of the IOUs and pursuant to Rule 16.6 of the Commission’s Rules of Practice and Procedure, to extend the deadline for submitting a workshop report for the February 2024 TA Services workshop to 90 days following a final decision in Track 1 of the TEPI Rulemaking. The IOUs served this workshop report on March 4, 2026, noting that the workshop and implementation requirements established under D.22-11-040 were

² See ALJ Ruling Initiating Track 1 and Inviting Party Comment, p. 2.

³ D.25-12-005, p. 16.

originally designed to work alongside the now-paused FC1 BTM TE Rebate Program and may not be fully applicable to current TA Services Program planning.⁴

On January 30, 2026, the Commission issued an email Ruling clarifying that the utilities would submit a workshop report within 60 days of the February 3, 2026 TA Services workshop.⁵

On February 3, 2026, the IOUs held a second virtual workshop to solicit stakeholder feedback for the development of the TA Program Handbook. A copy of the workshop report is included in this advice letter as Attachment 2.

DISCUSSION

Pursuant to D.25-12-005, SCE is serving as the program administrator for the purpose of coordinating the submittal of the draft TA Program Handbook on behalf of the IOUs. Once this advice letter is approved by the Commission, each IOU will implement the TA Services program for their own service territories.⁶ Future changes to the TA Program Handbook will be made in accordance with D.25-12-005.⁷

The IOUs will allocate the \$36 million TA Services authorized budget using the same methodology authorized in D.22-11-040⁸ and approved in each of the IOUs advice letters.⁹ Table 1, below, shows the funding allocation for the \$36 million authorized budget for the three year TA Services program.

**Table 1:
Proposed IOU Share of TA Services Funding Based on 2024 Electric Sales**

| Proposed Sales and Share | 2024 Sales (GWh) | IOU Share (%) | (\$ million) | |
|--------------------------|---------------------|---------------------|-------------------------|-------------------|
| | | | TA Services Share | Average Annual |
| PG&E | 76,286 | 42.3% | 15.23 | 5.08 |
| SCE | 85,156 | 47.2% | 17.00 | 5.67 |
| SDG&E | 17,412 | 9.7% | 3.48 | 1.16 |
| Bear Valley | 134 | 0.1% | 0.03 | 0.01 |
| Liberty | 565 | 0.3% | 0.11 | 0.04 |
| PacifiCorp | 778 | 0.4% | 0.16 | 0.05 |
| Totals | 180,330 | 100.0% | 36.00 | 12.00 |

⁴ See Joint Investor-Owned Utility Technical Assistance Workshop Report, dated March 4, 2026.

⁵ See <https://docs.cpuc.ca.gov/PublishedDocs/Efile/G000/M597/K166/597166363.PDF>

⁶ See D.25-12-005, p. 16.

⁷ See D.25-12-005, p. 16.

⁸ D.22-11-040, p. 91, adopted a funding allocation for the overall FC1 BTM TE Rebate Program that is based on each IOU's percentage of electric sales for 2024.

⁹ See SCE Advice 4925-E, PG&E Advice 6797-E, SDG&E Advice 4128-E, Liberty Utilities Advice 210-E, Bear Valley Electric Service Advice 461-EA, and PacifiCorp Advice 709-E.

The draft TA Program Handbook includes the requirements from D.22-11-040¹⁰ and the following additional requirements outlined in D.25-12-005¹¹:

- Timeline for program launch – see Section 5.
- Proposals for development and management of Marketing Education & Outreach (ME&O) plan – see Section 6.
- Proposals for development of outreach materials and efforts – see Section 6.
- Detailed budget that provides breakdown of proposed ME&O efforts – see Section 6.
- Planned data collection strategies to track TA program impact – see Section 7.
- Any additional efforts needed to ensure customers are aware of TA – see Section 6.

Additionally, Table 1 (below) provides a high level overview of the questions raised by stakeholders at the February 3, 2026 public workshop and the location in the draft TA Program Handbook where the information resides or an explanation of why the information is not included.

| Table 1 – TA Services Workshop Stakeholder Feedback | | |
|--|--|--|
| Topic | Details | Location in TA Program Handbook |
| Program Eligibility | Discuss TA Services eligibility, including whether all non-residential customers are eligible. | Section 2.1 – Eligibility |
| TA Services Advisor Role | Recommend the IOUs describe (1) the vision for the role of the TA Advisor, (2) if the advisor will continue to support customers after the initial consultation, (3) if the role will be consistent across the IOUs and how the role may differ between the IOUs, (4) if the advisor will perform customer site visits for pre-energization support, and (5) the number of advisors each IOU intends to employ and the number of customers each advisor can support at a given time. | Section 2.3.2 – TA Advisor Assignment |

¹⁰ See D.22-11-040, p. 192.

¹¹ See D.25-12-005, p. 16.

| | | |
|--|---|--|
| <p>IOU Resource Sharing and Sharing External Resources with Customers</p> | <p>Discuss whether there will be an opportunity for the IOUs to share resources when appropriate, to not duplicate efforts and recommend making external resources available to customers, such as GO-Biz ZEV infrastructure permitting guidebooks.</p> | <p>Section 6.1 – ME&O Plan (IOU resource sharing) Section 6.2 – Outreach Materials (external resources)</p> |
| <p>Pre-Energization Follow-up</p> | <p>Discuss whether the IOUs will follow-up with customers after sending the pre-energization report to get a status update or identify any barriers to the customer’s next steps in their TE projects.</p> | <p>Section 7 – TA Data Collection Strategy</p> |
| <p>Post-Installation Support in Spanish or other Languages</p> | <p>Discuss whether there will be post-energization support in Spanish or other languages.</p> | <p>Section 2.3.2 – TA Advisor Assignment</p> |
| <p>Rightsizing EV Projects</p> | <p>Discuss whether IOUs will include rightsizing in the pre-energization scope of work.</p> | <p>Section 3.1 – Pre-Energization Support Services</p> |
| <p>TA Advisor and Energization Single Point of Contact (SPOC) Coordination</p> | <p>Discuss whether there will be overlap in services provided to customers by TA Advisors and Energization SPOCs.</p> | <p>Section 3.2 – Energization/Interconnection Assistance</p> |
| <p>Application Readiness for Small Businesses and Multi-Family Residences</p> | <p>Discuss whether TA Services will assist customers with challenges faced when the decision to install EV chargers also involves landlord buy-in.</p> | <p>Not included in TA Program Handbook but can be included in as part of the planning support services that is provided to customers.</p> |
| <p>Incorporating Full Set of CCA Services with Shared Customers</p> | <p>Recommend IOUs engage with CCAs to incorporate CCAs rate and program offerings (e.g., DR programs), otherwise customers will receive incomplete or inconsistent guidance.</p> | <p>Section 2.4 – CCA Customers</p> |
| <p>Incorporating Various Marketing Channels</p> | <p>Recommend including a mix of marketing channels, including IOU channels such as bill inserts.</p> | <p>Not included in TA Program Handbook. Marketing tactics will be presented as part of the IOUs ME&O plan at the IOUs Program Advisory</p> |

| | | |
|--|--|--|
| | | Council (PAC) for additional feedback. |
| Standardizing Metrics Across IOUs and Integrating Customer Feedback Throughout Lifespan of TA Services | Discuss whether the IOUs anticipate using standardized metrics when tracking success across all IOU territories and whether the IOUs intend to integrate customer feedback throughout the lifespan of TA Services. | Section 6 – TA Data Collection Strategy |
| IOU Partnerships with Local Governments and Community Based Organizations (CBO) to Obtain Customer Project Information | Discuss whether CBOs or other third-parties, such as local governments, especially those that offer grants to do direct EVSE installs, to get information about a customer’s project status to avoid affecting a customer’s grant eligibility. | Section 2.2 – Customer Consent for Third-Party Providers |

TIER DESIGNATION

Pursuant to General Order (GO) 96-B, Energy Industry Rule 5.3, and D.25-12-005¹², this advice letter is submitted with a Tier 3 designation.

EFFECTIVE DATE

This advice letter will become effective after Commission approval.

NOTICE

Anyone wishing to protest this advice letter may do so only electronically. Protests must be received no later than 20 days after the date of this advice letter. Protests should be submitted to the CPUC Energy Division at:

E-mail: EDTariffUnit@cpuc.ca.gov

In addition, protests and all other correspondence regarding this advice letter should also be sent electronically to the attention of:

¹² See D.25-12-005, p. 16.

Rebecca Furman
Managing Director, State Regulatory Operations
Southern California Edison Company
E-mail: AdviceTariffManager@sce.com

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There are no restrictions on who may file a protest, but the protest shall set forth specifically the grounds upon which it is based and must be received by the deadline shown above.

In accordance with General Rule 4 of GO 96-B, SCE is serving copies of this advice letter to the GO 96-B and R.23-12-008 service list. Address change requests to the GO 96-B service list should be directed by electronic mail to AdviceTariffManager@sce.com or at (626) 302-6838. For changes to all other service lists, please contact the Commission's Process Office at (415) 703-2021 or by electronic mail at Process_Office@cpuc.ca.gov.

To view other SCE advice letters submitted with the Commission, log on to SCE's web site at <https://www.sce.com/wps/portal/home/regulatory/advice-letters>.

For questions, please contact Diana Valle at (626) 302-5666 or by electronic mail at diana.valle@sce.com.

Southern California Edison Company

/s/ Rebecca Furman
Rebecca Furman

CF:dv:lp
Enclosures



ADVICE LETTER SUMMARY

ENERGY UTILITY



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

Company name/CPUC Utility No.: Southern California Edison Company (U 338-E)

Utility type:

- ELC GAS WATER
 PLC HEAT

Contact Person: Darrah Morgan
 Phone #: (626) 302-2086
 E-mail: AdviceTariffManager@sce.com
 E-mail Disposition Notice to: AdviceTariffManager@sce.com

EXPLANATION OF UTILITY TYPE
 ELC = Electric GAS = Gas WATER = Water
 PLC = Pipeline HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #: 5784-E, 7884-E, 4818-E, 291-E, 542-E, 790-E Tier Designation: 3

Subject of AL: Establishment of the Joint Investor-Owned Utilities Technical Assistance Program Handbook Pursuant to Decision 25-12-005

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 #: Decision 25-12-005

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL:

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: -0-

Estimated system annual revenue effect (%):

Estimated system average rate effect (%):

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: None

Service affected and changes proposed¹:

Pending advice letters that revise the same tariff sheets: None

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: Rebecca Furman
Title: Managing Director, State Regulatory Operations
Utility/Entity Name: Southern California Edison Company

Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email: AdviceTariffManager@sce.com

Contact Name: Adam Smith c/o Karyn Gansecki
Title: Director, Regulatory Relations
Utility/Entity Name: Southern California Edison Company

Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email: karyn.gansecki@sce.com

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

Clear Form

ENERGY Advice Letter Keywords

| | | |
|---------------------------|--|--------------------------------|
| Affiliate | Direct Access | Preliminary Statement |
| Agreements | Disconnect Service | Procurement |
| Agriculture | ECAC / Energy Cost Adjustment | Qualifying Facility |
| Avoided Cost | EOR / Enhanced Oil Recovery | Rebates |
| Balancing Account | Energy Charge | Refunds |
| Baseline | Energy Efficiency | Reliability |
| Bilingual | Establish Service | Re-MAT/Bio-MAT |
| Billings | Expand Service Area | Revenue Allocation |
| Bioenergy | Forms | Rule 21 |
| Brokerage Fees | Franchise Fee / User Tax | Rules |
| CARE | G.O. 131-D | Section 851 |
| CPUC Reimbursement Fee | GRC / General Rate Case | Self Generation |
| Capacity | Hazardous Waste | Service Area Map |
| Cogeneration | Increase Rates | Service Outage |
| Compliance | Interruptible Service | Solar |
| Conditions of Service | Interutility Transportation | Standby Service |
| Connection | LIEE / Low-Income Energy Efficiency | Storage |
| Conservation | LIRA / Low-Income Ratepayer Assistance | Street Lights |
| Consolidate Tariffs | Late Payment Charge | Surcharges |
| Contracts | Line Extensions | Tariffs |
| Core | Memorandum Account | Taxes |
| Credit | Metered Energy Efficiency | Text Changes |
| Curtable Service | Metering | Transformer |
| Customer Charge | Mobile Home Parks | Transition Cost |
| Customer Owned Generation | Name Change | Transmission Lines |
| Decrease Rates | Non-Core | Transportation Electrification |
| Demand Charge | Non-firm Service Contracts | Transportation Rates |
| Demand Side Fund | Nuclear | Undergrounding |
| Demand Side Management | Oil Pipelines | Voltage Discount |
| Demand Side Response | PBR / Performance Based Ratemaking | Wind Power |
| Deposits | Portfolio | Withdrawal of Service |
| Depreciation | Power Lines | |

Attachment 1

Draft Technical Assistance (TA) Services Program Handbook

TECHNICAL ASSISTANCE (TA) SERVICES HANDBOOK

Table of Contents

| | | |
|----------|--|----|
| 1 | TECHNICAL ASSISTANCE SERVICES OVERVIEW | 4 |
| 2 | REQUIREMENTS FOR CUSTOMER ENGAGEMENT | 4 |
| 2.1 | Eligibility | 4 |
| 2.2 | Customer Consent for Third-Party Providers | 4 |
| 2.3 | Customer Enrollment | 5 |
| 2.3.1 | Interest Submission Process | 5 |
| 2.3.2 | TA Advisor Assignment | 5 |
| 2.3.3 | Consultation Call | 5 |
| 2.4 | Community Choice Aggregator Customers | 5 |
| 2.4.1 | Pacific Gas and Electric Company | 6 |
| 2.4.2 | Southern California Edison | 6 |
| 2.4.3 | San Diego Gas & Electric Company | 6 |
| 3 | TECHNICAL ASSISTANCE PROGRAM SERVICES | 6 |
| 3.1 | Pre-Energization Support Services | 6 |
| 3.2 | Energization/Interconnection Assistance | 6 |
| 3.3 | Load Management Plan | 7 |
| 3.3.1 | Pre-Installation Load Management Assistance | 7 |
| 3.3.2 | Post-Installation Load Management Plan | 7 |
| 3.4 | Post-Installation Support | 8 |
| 3.4.1 | EVSE Expansion | 8 |
| 4 | ENGAGEMENT WITH ELECTRIC VEHICLE SERVICE PROVIDERS (EVSPs) AND DR PROVIDERS | 8 |
| 5 | TIMELINE FOR TA PROGRAM LAUNCH | 8 |
| 6 | MARKETING, EDUCATION & OUTREACH (ME&O) | 9 |
| 6.1 | ME&O Plan | 9 |
| 6.2 | Outreach Materials | 9 |
| 6.3 | ME&O Budget | 10 |
| 7 | TA DATA COLLECTION STRATEGY | 10 |
| 7.1 | Load Management and VGI Targets/Metrics | 10 |
| 8 | APPENDIX A: SAMPLE TA DATA TEMPLATE | 11 |

1 TECHNICAL ASSISTANCE SERVICES OVERVIEW

To support electrification across the service areas Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, Liberty Utilities (CalPeco Electric) LLC, Bear Valley Electric Service Inc., and PacifiCorp d/b/a Pacific Power (collectively the Joint IOUs) this handbook will walk through the implementation of Technical Assistance (TA) services stemming from D.22-11-040 and D.25-12-005. This handbook outlines the scope and requirements of the joint IOUs TA services, as well as details on interactions between the joint IOUs TA Services and external parties that support or provide similar services to customers. The vision of TA offered by the joint IOUs is to support customer success in transportation electrification (TE) by acting as a trusted advisor, delivering timely, targeted technical assistance, and guiding customers through the energization process to accelerate projects.

2 REQUIREMENTS FOR CUSTOMER ENGAGEMENT

2.1 Eligibility

To receive TA services offered by the joint IOUs, participants must be non-residential customers with facilities located within the electric service area of the joint IOUs, including those customers receiving power from a Community Choice Aggregator.

Participants may be required to agree to program terms and conditions as to be determined.

Participants may be required to provide the site's utility account number(s) and meter number(s) as validation of electric utility service for the site. If the site does not have an account number or active meter number, other eligibility documentation is possible.

Participants developing Greenfield projects¹ that do not have an associated account may need to provide documentation showing property owner authorization.²

- If the participant is not the property owner, an attestation allowing them to submit on the property owner's behalf is required.
- Development of Greenfield properties requires compliance with all the IOU's applicable tariffs, including but not limited to: Electric Line Extensions, Service Extensions, Interconnection, and Electric Vehicle Infrastructure Rules.

2.2 Customer Consent for Third-Party Providers

Customers can authorize a third-party to initiate the request for TA services on their behalf and participate in any of the services alongside the customer. As part of the Interest Process, third parties acting on behalf of a customer must receive prior authorization from the customer in accordance with the specific IOU's terms and conditions. Third parties may include consultants, suppliers, program implementers, or any other third party that the customer identifies. Please refer to your specific IOU's website for more information.

¹ Greenfield projects are defined as projects that are developed on completely new land or infrastructure.

² Required documentation ensures responsible use of the TA services by allowing joint IOUs to focus on genuine inquiries and manage the volume of speculative requests. Documentation examples may include a deed, or equivalent, supporting easement development.

2.3 Customer Enrollment

2.3.1 Interest Submission Process

The Interest Submission Process is the first step for a customer, or their authorized third-party, to request TA services. Customers can complete an interest form available on each IOU's webpage to connect with a dedicated TA Advisor. The interest form is designed to gather basic information such as customer contact information, account information, and the type of site.

2.3.2 TA Advisor Assignment

The TA Advisor role will be consistent across the IOUs; however, the total number of TA Advisors that are available to assist customers will vary based on the IOU and on the demand for TA services. Customers are assigned a dedicated TA Advisor after completing the interest form. The TA Advisor is a dedicated point of contact who will assist the customer throughout their TA journey by answering questions related to the TA process, directing customers to appropriate resources, and connecting customers to subject matter experts when needed. Each IOU will determine the necessity for non-English language TA Advisor support based on the demographics and established business practices within their service territories.

2.3.3 Consultation Call

The TA Advisor will schedule a consultation call with the customer to assess their current level of TE readiness and identify their goals. Based on the customer's needs, the TA Advisor will recommend available programs, services, and tariffs and outline the next steps, including any applicable requirements to receive those services.

2.4 Community Choice Aggregator Customers

For customers who purchase electricity from their local Community Choice Aggregator (CCA), it will be important for customers to work directly with their CCAs. The general guidelines for CCA customers are outlined below, but the process may vary for each IOU. For additional assistance, customers may work directly with a TA Advisor for more information.

The IOUs will coordinate with the CCAs in their territory to provide education to CCA customers on the most beneficial rates, TA, and CCA-specific offerings. This will be done in accordance with D.12.12-036, which adopted a Code of Conduct that governs the treatment of CCAs by electrical corporations, including how utilities may communicate with CCAs and CCA customers about CCA-related issues, such as rates and programs.

Each IOU will engage the CCAs in their service area before initial launch of the TA services program to understand currently available CCA offerings and how the joint IOU TA services will complement those offerings. The IOUs will reengage with their CCAs on at least an annual basis to solicit feedback and identify opportunities to improve TA Service offerings for CCA customers, in addition to ad-hoc coordination as needed.

Liberty Utilities (CALPECO Electric) LLC, Bear Valley Electric Service Inc, and PacifiCorp d/b/a Pacific Power do not have any CCAs in their territory.

2.4.1 Pacific Gas and Electric Company

A list of active CCAs operating in PG&E's service area can be found at

<https://pge.com/en/account/alternate-energy-providers/community-choice-aggregation.html>.

CCAs currently offering TA services include:

- MCE Clean Energy: www.mcecleanenergy.org/ev-charging, 1-833-632-3674
- Peninsula Clean Energy (PCE): www.peninsulacleanenergy.com/business/rebates-offers-business/ev-ready-program, 1-866-966-0110
- San Jose Clean Energy (SJCE): <https://goelectricadvisor.sanjosecleanenergy.org>, 1-833-432-2454
- Silicon Valley Clean Energy (SVCE): <https://goelectric.svcleanenergy.org>, 1-833-243-4235

2.4.2 Southern California Edison

Detailed information regarding SCE's CCA programs, including a list of active CCAs operating in SCE's service area, can be found at <https://www.sce.com/customer-service-center/community-choice-aggregation>. Customers may also email ccasuprt@sce.com for additional information.

2.4.3 San Diego Gas & Electric Company

Detailed information regarding SDG&E's CCA programs, including a list of active CCAs operating in SDGE service area can be found on our website at <http://www.sdge.com/customer-choice/community-choice-aggregation/active-ccas>.

3 TECHNICAL ASSISTANCE PROGRAM SERVICES

There is a range of TA services available to support a customer's TE transition. The following is a summary of available services that may be provided to address customers' needs. Each IOU may opt to develop additional services or TA resources beyond those listed here based on the expressed needs of the customers in their service territory.

3.1 Pre-Energization Support Services

Pre-Energization Support Services are planning support and advisory services which contain site specific analyses and recommendations. The content is tailored to address the customer's needs including, but not limited to:

- Customer & Site Information
- Site Planning & Sizing Recommendations
- Grant and Rebate Opportunities
- Load Management & Vehicle-Grid-Integration Options
- Customer Actionable Next Steps

3.2 Energization/Interconnection Assistance

Due to ongoing needs related to timely energization, the Energization/Interconnection (E/I) Assistance service is designed to support customers that are ready to energize and connect their chargers to the grid. TA Advisors will help customers understand the requirements and forms needed from the customer to complete this step in their project. TA Advisors will help

customers connect with the right IOU departments to complete the energization/interconnection process. The customer may also work with an IOU energization point of contact (POC).³ Their role will be to complete the IOUs requirements for project energization, while the TA Advisor will help the customer complete the customer's deliverables to support streamlining and accelerating project energization.

General objectives of E/I Assistance include:

- Reducing planning complexity to get customers to the point of application sooner
- Improving the customer's application readiness so that they can move through the process more quickly
- Addressing roadblocks that occur in real time so that projects can keep moving forward

Each IOU has unique processes and customer challenges related to energization and interconnection, so service specifics are expected to vary. Service support may include:

- Up-front customer education on the energization and interconnection processes, including customer obligations and anticipated timelines
- Assistance with preparing and/or submitting a completed application package for new service or service interconnection
- Ongoing application tracking and ad-hoc problem solving
- Other support as identified by customers

For the customer to demonstrate that they are ready to receive E/I Assistance, each IOU may have service prerequisite criteria such as permitting status, equipment purchase commitments, site designs, spec sheets, or other documentation.

3.3 Load Management Plan

A Load Management Plan (LMP) is designed to educate customers on strategies and options to support a charging load that is flexible and responsive to price signals. They will educate customers and provide guidance on available options for Vehicle-Grid Integration (VGI) and load management, including enrollment in Demand Response (DR) programs and deployment of Automated Load Management (ALM). Results of the plan will be formally approved upon delivery of the LMP by the IOU.

3.3.1 Pre-Installation Load Management Assistance

Pre-installation load management assistance is meant to support customers who have not yet installed their charging infrastructure.

3.3.2 Post-Installation Load Management Plan

The post-installation LMP is meant to support customers who have already installed their charging infrastructure and have been using it for at least six (6) months. The goal of this service is to provide a review of the current energy consumption from the installed charging infrastructure. This service may address current IOU pricing plan options, unmanaged versus scheduled charging costs, and potential cost savings available through load management practices. TA Advisors will offer to schedule a meeting to discuss the report and next steps for implementation of recommendations.

³ See D.24-09-020, pp. 66-68.

To demonstrate that the customer is ready to receive a post-installation LMP for a given site, each IOU may have prerequisite service criteria requirements such as identifying an installation address that coincides with the proof of electric utility service, demonstrating six (6) months of usage data, providing Electric Vehicle Supply Equipment (EVSE) technical specifications, or other documentation.

3.4 Post-Installation Support

The goal of Post-Installation Support is to help customers optimize their current operations for EVs and to expand their deployment of EVSE.

To demonstrate that the customer is ready to receive post-installation support for a given site, each IOU may have prerequisite service criteria requirements such as identifying an installation address that coincides with the proof of electric utility service, demonstrating six (6) months of usage data, providing EVSE technical specifications, or other documentation.

3.4.1 EVSE Expansion

The post-installation EVSE Expansion service is meant to help customers who have installed and energized EV charging on their site and want to add more chargers as efficiently as possible.

The content of these services is tailored to address the customer's needs and requested support, including, but not limited to:

- Evaluations of the site's current energy consumption
- Performance of existing EV charging infrastructure
- Expansion plans of the customer
- Available IOU infrastructure that can accommodate expansion plans

4 ENGAGEMENT WITH ELECTRIC VEHICLE SERVICE PROVIDERS (EVSPs) AND DR PROVIDERS

In administering this program, the Joint IOUs will uphold strict standards of technology and product neutrality to avoid undue influence on competitive markets and safeguard customer choice with respect to products, technologies, and service providers.

EVSPs and providers of ALM and DR bring technical expertise and industry perspectives that would benefit customers participating in TA services. To provide continued engagement with these industry stakeholders, the IOUs will hold an annual workshop to solicit feedback on TA Service offerings from the EVSPs, ALM and DR providers, and other interested stakeholders.

5 TIMELINE FOR TA PROGRAM LAUNCH

The table below presents a proposed timeline for the TA program launch. However, the final implementation schedule will depend on the approval date of the TA Program Handbook.

| Date | Activity |
|---------------|--|
| 12/5/2025 | Final Decision (D.25-12-005) issue date |
| 2/3/2026 | Workshop deadline, per D.25-12-005, Ordering Paragraph (OP) 2. |
| 4/6/2026 | TA Program Handbook submitted via Tier 3 Advice Letter |
| 7/5/2026* | TA Program Handbook approved by Commission |
| 10/3/2026 ** | Program implementation begins |
| 10/3/2029 *** | Program implementation ends |

The exact timeline for program implementation will be determined by the approval date for the TA Program Handbook.

* This estimate is based upon a 90-day approval timeline for the TA Program Handbook.

** TA Services Program implementation will begin 90 days after the Commission’s approval of the TA Program Handbook.

*** The TA Services program will run for a 3-year period.

6 MARKETING, EDUCATION & OUTREACH (ME&O)

6.1 ME&O Plan

Based on past TE program implementation experience, the IOUs have found that flexibility in ME&O efforts is critical. Each tactic may vary in its effectiveness, and the ability to pivot away from unsuccessful strategies and to take advantage of new marketing pathways is necessary to have an effective and affordable outreach strategy.

Each IOU will develop an ME&O plan, including proposed outreach materials and detailed budgets that will largely be informed by prior experience conducting outreach for TE programs. The ME&O plans will be presented to each IOU’s Program Advisory Council (PAC) for additional feedback prior to implementation. Given the significant differences in customer composition and available budgets, tactics are expected to vary significantly from one IOU to the next. Each IOU may opt to adjust their outreach strategy over time based on which tactics are delivering the best outcomes.

Marketing tactics may include:

- Email or direct mail campaigns to target audience segments
- Social media campaigns using IOU social media channels as well as business-oriented platforms such as LinkedIn
- Event attendance such as ride-and-drives, sector-specific events focused on clean transportation, and EV industry events
- Utilization of community organizations to do grassroots customer engagement
- Collaboration with Grant Agencies, EVSPs, OEMs, or vehicle dealerships

Where appropriate, the IOUs may opt to pool resources on certain marketing tactics to reduce costs and maximize impact. Examples of this may include joint webinars or shared tables at events.

6.2 Outreach Materials

Outreach Materials will be used to coordinate both targeted and general business-to-business awareness campaigns designed to reach more customers with greater frequency. Based on the needs of reaching the IOU’s customer base, these materials may include printed materials such

as direct mail, informational brochures, and one-pagers, and digital materials such as web pages, emails, and social media postings. IOUs may co-develop content or share external resources to support customer education and outreach where appropriate.

6.3 ME&O Budget

The budget for ME&O has been set at 6% of the total program budget, or \$2.16 million. The IOUs will allocate the ME&O budget using the same methodology authorized in D.22-11-040⁴ and approved in each of the IOUs advice letters.⁵ This will be broken out by IOU as follows:

| Utility | ME&O Budget By IOU |
|--|--------------------|
| Pacific Gas and Electric Company | \$913,680 |
| Southern California Edison Company | \$1,019,520 |
| San Diego Gas & Electric Company | \$209,520 |
| Liberty Utilities (CalPeco Electric) LLC | \$6,480 |
| Bear Valley Electric Service Inc. | \$2,160 |
| PacifiCorp d/b/a Pacific Power | \$8,640 |

7 TADATA COLLECTION STRATEGY

The joint IOUs will work with Energy Division staff to develop a TA data template. The final TA data template will be posted on the CPUC's Technical Advisory (TA) Services website and a link will be available from the Transportation Electrification website⁶. Energy Division will notify the relevant service lists when the TA Services website and final TA data template are available. For any future changes to the TA data template, Energy Division will consult with the IOUs and stakeholders and notify the relevant service lists. A sample TA data template is attached as Appendix A.

Each IOU will complete the TA data template for their respective TA program on an annual basis and will serve a public version to the relevant service lists on June 30th, consistent with deadline for the Annual TE Programs and Initiatives Compliance Report.⁷

In addition to the TA data template, the IOUs will also seek qualitative insights and verbatims from participating customers to inform the effectiveness of each of the TA services provided and identify areas for improvement. Qualitative insights will be collected via survey(s) on a rolling basis, and results will be shared with ED staff on an annual basis.

7.1 Load Management and VGI Targets/Metrics

The targets for Load Management and VGI will vary by IOU due to the varying sizes of their customer base. As part of the data collection strategy, the IOU's will be reporting on the number of customers receiving support for both VGI and Load Management. These metrics will be used to inform potential improvements to support customers as the program evolves.

⁴ D.22-11-040, p. 91, adopted a funding allocation for the overall FC1 BTM TE Rebate Program that is based on each IOU's percentage of electric sales for 2024.

⁵ See SCE Advice 4925-E, PG&E Advice 6797-E, SDG&E Advice 4128-E, Liberty Utilities Advice 210-E, Bear Valley Electric Service Advice 461-EA, and PacifiCorp Advice 709-E.

⁶ See <https://www.cpuc.ca.gov/industries-and-topics/electrical-energy/infrastructure/transportation-electrification>

⁷ See D.25-12-005, pp. 6-7.

8 APPENDIX A: SAMPLE TA DATA TEMPLATE

| # | Sheet Name | Field Name | Description | Example |
|----|---------------|-------------------------------------|---|------------------------------|
| 1 | Location data | IOU Unique Site ID | Unique identification number of site provided by Utility | XXXXXX |
| 2 | Location data | Service Utilized | There will be one row per participant for each of the services they utilized | ALM guidance |
| 3 | Location data | Reporting Date | Date that data is being reported | 1/1/2026 |
| 4 | Location data | Interest Submission Date | Date the customer submitted their application | 6/1/2025 |
| 5 | Location data | Interest Approval Date | Date the customer's application is approved or similar milestone. Only applies for eligible customers for TA Svcs. | 7/1/2025 |
| 6 | Location data | City | City | |
| 7 | Location data | County | County | |
| 8 | Location data | Zip Code | Zip Code | |
| 9 | Location data | Customer Sector | Is customer a School Facility, Transit Agency (public), Municipality, Small Business, Passenger Transportation (excluding Transit), Distribution and Warehousing, Food and Agriculture, Services, Manufacturing, Seaport, Airport, or Other | Distribution and Warehousing |
| 10 | Location data | Primary Vehicle Type | What is the primary vehicle type located at this facility: Light duty, Medium duty, Heavy duty, Transit bus, School bus, Off-road | Heavy duty |
| 11 | Location data | Referred to infrastructure program | Was customer referred to applicable infrastructure program or rules? (Y/N) | Y |
| 12 | Program data | Reporting Date | Date that data is being reported to CPUC | 1/1/2026 |
| 13 | Program data | Count of participants | Total number of sites participating in the program | 100 |
| 14 | Program data | Customer acceptance rate | Total number of eligible applications divided by total number of applications received | 90% |
| 15 | Program data | Web services unique site visits | Number of unique site visits for web service tools | 5000 |
| 16 | Program data | Total program spend to-date | Total program spend as of the reporting date | \$1.595M |
| 17 | Program data | Total number of customers delivered | Count of the total number of participants across each of the TA services offered. | 14 |
| 18 | Services Tab | Reporting Date | Date that data is being reported to CPUC | 1/1/2026 |
| 17 | Services Tab | Service Start Date | Date the formal services provided to the customer were initiated after approval of application | 7/7/2025 |
| 18 | Services Tab | IOU Unique Site ID | Unique identification number of site provided by Utility | XXXXXX |
| 19 | Services Tab | Service Completion Date | Date the formal services provided to the customer were completed | 11/1/2025 |

SAMPLE

Attachment 2

**Technical Services (TA)
02-03-26 Workshop Report**

TECHNICAL SERVICES (TA) WORKSHOP REPORT

Southern California Edison Company
San Diego Gas & Electric Company
Pacific Gas and Electric Company
Liberty Utilities (CalPeco Electric) LLC
Bear Valley Electric Service Inc.
PacifiCorp

April 6, 2026

Table of Contents

| | |
|--|----|
| I. Executive Summary..... | 3 |
| II. Regulatory Background | 3 |
| III. Workshop Summary | 4 |
| A. IOU Vision and Goals for TA Services | 4 |
| B. IOU TA Framework and Services | 6 |
| C. Energization & Interconnection Assistance | 8 |
| D. Consideration for Small IOUs..... | 9 |
| E. Community Choice Aggregator (CCA) Engagement..... | 9 |
| F. Marketing, Education, & Outreach (ME&O) Strategy..... | 10 |
| G. Timeline for TA Program Launch..... | 10 |
| H. Open Q&A Discussion | 11 |
| IV. Appendix A: Workshop – Joint IOU Technical Assistance (TA) Services Deck | 12 |

I. Executive Summary

On February 3, 2026, the investor-owned utilities (IOUs)¹ hosted a second virtual workshop² to solicit stakeholder feedback for the development of a Technical Advisory (TA) Services Program Handbook, which will outline the services and rules around the IOUs' programs to assist all non-residential customers seeking to electrify their transportation.

Commission President Alice Reynolds delivered opening comments, thanked attendees for their participation and highlighted TA Services as an essential tool that will assist a diverse group of customers, regardless of their experience with transportation electrification (TE), navigate available resources and rules. President Reynolds stressed that TA Services plays a key role in supporting energization by reducing the time it takes to get more projects connected to the grid.

Each IOU will administer their own TA Services program, which will provide customers with a single point of contact through their TE project and will assist with choosing between types of EV chargers, load management planning, and selecting rates. Additionally, the December 2025 Transportation Electrification Policy and Infrastructure (TEPI) Decision (D.25-12-005) granted the IOUs discretion to narrow the scope of TA Services to better support customer's energization requests for their TE projects.

Although participant questions covered a range of topics, key areas of discussion included: (1) the integration of TA Services with the rules and timelines established under the Energization Rulemaking (R.24-01-018); (2) the qualifications and expertise of TA Services advisors to effectively support customers in accelerating their TE transition; and (3) the importance of incorporating rightsizing within the TA Services scope of work to minimize project and ratepayer costs by avoiding unnecessary upsizing requests.

II. Regulatory Background

In November 2022, the CPUC issued Decision (D.) 22-11-040 in the Development of Rates and Infrastructure for Vehicle Electrification (DRIVE) Rulemaking (R.18-12-006), which adopted a long-term TE policy framework that included a five-year, third-party administered statewide TE infrastructure rebate program referred to as Funding Cycle

¹ Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), Liberty Utilities (CalPeco Electric) LLC, Bear Valley Electric Service Inc., and PacifiCorp d/b/a Pacific Power.

² The first TA Services workshop occurred on February 28, 2024, in accordance with Ordering Paragraph (OP) 6 of Decision (D.)22-11-040.

One Behind-the-Meter (FC1 BTM) Rebate Program, an IOU-administered TA Program, and a pilot program called Locally Invested Transportation Equity (LITE).

On December 20, 2023, the CPUC opened Rulemaking (R.) 23-12-008, Order Instituting Rulemaking Regarding Transportation Electrification Policy and Infrastructure (TEPI) and closed the DRIVE Rulemaking.

On April 12, 2024, a Scoping Memo and Ruling for R.23-12-008 was issued and directed that implementation of the FC1 BTM Rebate Program be paused pending reassessment by the Commission.³

On December 4, 2025, D.25-12-005 of the TEPI Rulemaking was issued. The Decision ordered the utilities to (1) resume implementation of the TA Services Program, now separated from the paused FC1 BTM TE Rebate Program, (2) hold a new workshop for development of the TA Services Program Handbook, and (3) submit the draft TA Program Handbook via a Tier 3 Advice Letter.

On January 30, 2026, the Commission issued an email Ruling clarifying that the utilities would submit a workshop report within 60 days of the February 3, 2026, workshop.⁴ The utilities agreed that the new workshop report would be submitted alongside the TA Handbook Tier 3 Advice Letter.

III. Workshop Summary

A. IOU Vision and Goals for TA Services

The IOUs opened the workshop by sharing their vision for TA Services: to support customers in their TE journey by using the IOUs' experience in administering TE and TA programs and by providing timely and targeted technical assistance through the customer's energization process.

The IOUs also provided an overview of the TA Services (1) program scope and (2) Program Handbook requirements, which includes requirements from D.22-11-040 and D.25-12-005 outlined in the tables below.

The IOUs invited participants to ask questions, such as suggestions on the topics to be included in the Program Handbook. However, there were no questions or comments raised by participants.

Table 1 – TA Services Program Scope

| D.22-11-040 | D.25-12-005 |
|------------------------------|--|
| • Basic Technical Assistance | • IOU discretion to narrow the scope of TA Services from those envisioned in |

³ See <https://docs.cpuc.ca.gov/PublishedDocs/Efile/G000/M529/K525/529525879.PDF>

⁴ See <https://docs.cpuc.ca.gov/PublishedDocs/Efile/G000/M597/K166/597166363.PDF>

| | |
|---|---|
| <ul style="list-style-type: none"> • Planning load management and other Vehicle-Grid Integration (VGI) considerations • Help with choosing rates • Support with walking through the IOU interconnection and energization processes • Support and advisory services during planning, installation, and post-deployment • Operations post-deployment, like load management, and future fleet electrification • Available Automated Load Management (ALM) and Distributed Energy Resources (DER) options to lower deployment costs | <p>D.22-11-040 if this allows them to better tailor services to support timely energization</p> |
|---|---|

Table 2 – TA Program Handbook Requirements

| D.22-11-040 | D.25-12-005 |
|---|--|
| <ul style="list-style-type: none"> • Scope of IOUs' TA programs • Joint requirements and processes for speaking with customers about TA • Defined channels of communication between each IOU's TA and each CCA in their territory • Established practices for how to work directly with each CCA in an IOU's territory in discussing rates and directing customers to a CCA when necessary • Defined channels of communication between each IOU's TA and the Program Administrator • Guidelines for how the IOUs' TA programs should engage with the private market of Electric Vehicle Service Providers (EVSPs) and Demand Response providers • Details and requirements for customer load management plans • Load management and VGI targets/metrics | <ul style="list-style-type: none"> • Timeline for program launch • Proposals for development and management of Marketing Education & Outreach (ME&O) plan • Proposals for development of outreach materials and efforts • Detailed budget that provides breakdown of proposed ME&O efforts • Planned data collection strategies to track TA program impact • Any additional efforts needed to ensure customers are aware of TA |

B. IOU TA Framework and Services

The IOUs outlined the framework in which TA Services will be operated, beginning with the TA Interest Process. The TA Interest Process will involve a dedicated IOU TE Advisor that will work with customers to determine the level of support needed and then provide the relevant support across the following services: (1) General Education, (2) Pre-Energization Support Services, and (3) Post-Energization Support Services.

- General Education: may include self-service videos and tools, such as total cost of ownership calculators and educational videos, and online and in-person workshops and webinars to educate customers on TE-related topics, such as new incentives and funding opportunities.
- Pre-Energization Support Services: may include an analysis of the customer's proposed TE project, such as charger and vehicle selection considerations, providing guidance on energization pathways, identifying opportunities for grants and rebates, load management guidance, and actionable next steps.
- Post-Energization Support Services: may include educational content for customers with deployed EVs based on customer interest and a post-installation refresh on Load Management Plan (LMP) and EV Readiness Studies (EVRS).

1. TA Interest Process

During the discussion, participants raised several questions in the chat regarding the program's eligibility, TA advisor roles, and support for small businesses and other customer segments.

The IOUs clarified that all non-residential customers are eligible for TA Services and noted that previous IOU-specific TA programs, referred to as TE Advisory Services or TEAS, generally focused on specific Disadvantaged Communities (DACs) or targeted customer subsets. A participant asked whether the program's TA advisors are expected to be subject matter experts or serve as connectors for customers. The IOU responded that TA advisors are trained to be expert connectors: while they may not have all the answers themselves, their role is to connect customers with the right specialists based on individual needs. This approach ensures customers are efficiently guided to the expertise required for their specific projects.

Another participant asked if TA advisors would continue to support customer interactions after the initial consultation. The IOUs agreed, noting that TA advisors would continue to assist customers as needed, especially since some program offerings involve ongoing engagement.

Participants highlighted the challenges small businesses and small fleets face with limited space for EV charging, referencing past obstacles and asking if special efforts

would be made to assist these customers. IOUs explained that within the program's existing framework, there are no explicit provisions for small businesses with space limitations. However, TA advisors would connect these customers to experts capable of addressing their unique project needs. The IOUs emphasized that TA Services are intended to help all customers. They also noted that although there are no further TE programs beyond 2026 with the sunset of Funding Cycle Zero (FC0), several IOUs have TE incentives and rebate programs through their respective Low Carbon Fuel Standard (LCFS) programs.

2. General Education

The IOUs agreed with participants that there will be opportunities to share resources to avoid duplicating efforts, and to exchange knowledge and best practices. However, the IOUs clarified that sharing resources related to TA Services program funding would be handled on a case-by-case basis. PG&E shared examples of past collaboration, such as webinars on MDHD fleet infrastructure programs where each IOU contributed to organizing the events. However, the IOUs acknowledged that each IOU has unique needs which can often limit the feasibility of joint IOU efforts.

A participant suggested that the IOUs include links to GO-Biz's ZEV infrastructure permitting guidebooks within shared resources. The IOUs agreed that sharing such references would be beneficial.

3. Pre-Energization Support Services

The discussion centered on the approach to pre-energization support for customers, specifically whether site visits by TA Advisors will be conducted. PG&E and SCE noted that in their service areas, customer site visits are generally not performed due to cost concerns and the broad geographic reach of their territories. Instead, the IOUs rely on desktop reviews, which they find to be more cost-effective and equitable for customers. However, SDG&E explained that due to their smaller service area, TEAS Advisors have been able to make in-person visits when needed, especially to help overcome specific barriers faced by customers. A participant pointed out that although desktop reviews are common, vendors often provide more precise information through site visits, sometimes at no cost, and suggested that the effectiveness of desktop reviews may be limited in this context. In response, PG&E clarified that third-party vendors often depend on IOUs for technical data and that IOUs collaborate with consultants and contractors to support customers.

4. Post-Energization Support Services

Participants asked whether there will be a process to check in with customers one or two months after sending the pre-energization report, specifically to see whether customers have taken additional steps and to identify any obstacles. The IOUs agreed

that follow-up discussions with customers will be considered and that resources can be offered, but engagement levels and services may vary and following up with customers does not necessarily mean customers are progressing with their projects.

In response to a question from a participant, SCE confirmed that there are Spanish-speaking TA Advisors at SCE and that efforts are made to meet customers where they are.

Additionally, the IOUs sought input from participants, noting that as the TA Services program expands to serve multi-unit dwellings (MUDs), small businesses, and other groups beyond fleets, the IOUs are interested in understanding what kind of post-energization support is most helpful to customers. For example, the Load Management Plan (LMP) may differ in impact for customers who do not own EVs.

PG&E also shared that PG&E is launching a research study funded through the Low Carbon Fuel Standard (LCFS) to better understand the needs of non-fleet customers and suggested potential engagement with Community Choice Aggregators (CCAs) and Community-Based Organizations (CBOs) to improve support.

Participants explained that many small fleets operate from temporary locations and residences rather than permanent depots, making space constraints a common issue and suggested that TA Services should help businesses even if they can only install a minimal number of chargers. In response, the IOUs clarified that the role of TA Services includes helping customers determine whether to use new or existing service connections for EV charging, emphasizing that using existing infrastructure may be more cost-effective.

C. Energization & Interconnection Assistance

The IOUs described the challenges customers face with EV projects, such as confusion around the requirements for energization and interconnection applications, difficulty identifying and sourcing qualified engineers and contractors, and a lack of understanding of technical and safety requirements and how TA Services will provide energization and interconnection assistance. Specifically, TA Services will provide EV customers with a single point of contact to provide comprehensive support prior to and during application for new EV service and/or interconnection application of Vehicle-to-Grid (V2G) or supporting Distributed Energy Resources (DERs)

In response to a question from participants regarding the number of TA Advisors needed and the number of customers each TA advisor can support, PG&E explained that the number of TA Advisors will depend on the uptake of the program and that PG&E currently has four advisors in its TEAS program, each managing about five customers per month. Additionally, PG&E explained that as TA Services grows, more TA Advisors

may be added. SCE shared that SCE plans to have four to five advisors for its TA Services program.

A participant asked if there will be a potential overlap between the services provided by energization projects, where customers are assigned a single point of contact (SPOC) for engagement, and the services offered to TA Services customers. PG&E clarified that there will not be an overlap in services and explained that for PGE, a SPOC job owner assists customers through the energization process, focusing on PG&E's deliverables, while the TA Advisor will help customers with their responsibilities. SCE agreed and noted a similar division of roles at SCE. Additionally, SDG&E emphasized the importance of understanding where customers face challenges in the energization process, and how TA Services will aim to improve support and address roadblocks, such as challenges with the application submission phase and tasks such as permitting and securing easements, which have been a significant challenge for customers.

Participants also noted the complexity faced by small businesses and residences, especially when landlords are involved in installation decisions. The IOUs explained that TA Services will be available for non-residential customers, though the IOUs may assist MUDs. Support for this customer segment may include helping applicants make a compelling case to landlords, highlighting benefits like increased property value and business longevity.

D. Consideration for Small IOUs

The small multi-jurisdictional utilities (SMJUs) described the differing level of resources as compared to the large IOUs, noting the smaller budgets that will be available for their TA Services programs, which will require the SMJUs to provide more focused delivery of TA Services and explore options for joint contracting, such as the application intake process, EV Readiness Studies, and self-service tools. Despite the limited resources, the SMJUs noted that their TA Services programs will adhere to the overall TA Services framework (i.e., intake, planning, installation, and post-installation).

Participants asked whether the SMJUs could benefit from sharing resources with the large IOUs due to their limited resources but noting the distinct needs of each SMJU and if so, what such resource sharing might look like for SMJUs. In response, the SMJUs explained that the large IOUs are already sharing their resources with SMJUs to some extent, and suggested that further progress could be made if there were statewide mechanisms or plans, such as an EV Readiness Plan, which could be universally applied, benefiting both large and small IOUs alike.

E. Community Choice Aggregator (CCA) Engagement

The IOUs described the code of conduct adopted in D.12-12-036, which governs the treatment of CCAs and CCA customers about CCA-related issues, such as rates and

programs and noted that SMJUs did not have any CCAs in their territory. Additionally, the IOUs asked participants whether there were any other considerations for the IOUs when collaborating on customer referrals with CCAs. In response, participants emphasized the importance of providing a comprehensive set of services to shared customers, extending beyond CCA rates to include programs such as demand response (DR), adding that without close coordination, customers may receive incomplete or inconsistent guidance, as their needs encompass more than just CCA rates. The IOUs explained that IOUs anticipate gaining a clearer understanding of all the services offered, ensuring customers are properly directed to the appropriate contacts within the CCAs as part of the IOUs meetings with CCAs.

F. Marketing, Education, & Outreach (ME&O) Strategy

The IOUs explained that based on past program experience, flexibility in ME&O efforts is critical as the IOUs will need to adapt to what is or is not working well to efficiently use available funding. Additionally, the IOUs said that upon the approval of the TA Program Handbook, each IOU will develop an ME&O plan that will include proposed outreach materials and the anticipated budgets, which will vary largely between the IOUs and result in significantly different tactics between IOUs, and plan to socialize the ME&O plans at each IOUs Program Advisory Council (PAC) for stakeholder feedback.

During the discussion, SBUA referenced a survey conducted by CLEARResult for SBUA, which involved 400 small business entities regarding preferred communication channels for EV charging information. SBUA noted that the survey revealed that receiving information with the electric utility bill was most preferred by respondents, while phone calls from the program team were least favored. Additionally, interviewees generally considered electric utilities to be a trusted source, though a minority expressed strong disagreement. As a result, SBUA said that a combination of communication channels should be utilized for TA Services, with utility channels being essential. PG&E said that although bill inserts have not been used previously by PG&E, the expanded scope of TA Services may make bill inserts a more sensible option moving forward. Last, SBUA recommended the CLEARResult report be included in the TA Services Workshop Report. A copy of this report is located at Attachment 3 at:

<https://docs.cpuc.ca.gov/PublishedDocs/SupDoc/A2305010/7089/526147192.pdf>.

G. Timeline for TA Program Launch

The IOUs outlined the anticipated timeline for launching TA Services and noted that the estimated launch date of October 1, 2026, was dependent on the Commission's approval of the Tier 3 Advice Letter for the TA Program Handbook. There were no questions or comments raised by participants.

H. Open Q&A Discussion

The Q&A session focused on strategies to help customers reduce project costs, optimize electrical services, address small and medium-sized business needs, incorporate feedback, streamline processes, offer rebates and incentives, and build partnerships with local agencies and CBOs.

A CCA representative asked whether rightsizing, defined as tailoring electrical infrastructure to actual needs rather than automatically upsizing, will be included in the TA Services program scope, noting that rightsizing helps reduce project and rate costs and avoids delays in energization queues, especially for MUDs and smaller fleets. The IOUs confirmed that they already engage customers in conversations about existing capacity and needs, striving to fit solutions within current infrastructure and agreed that avoiding unnecessary service upsizing provides multiple benefits for TE and broader statewide electrification efforts. PG&E underscored the importance of rightsizing EV load and balancing cost benefits during early customer engagements.

Participants also reiterated prioritizing support for small and medium-duty heavy-duty (MDHD) fleet operators, noting their unique charging needs. IOUs agreed, adding that smaller operators face greater challenges in cost-benefit analysis and electrification compared to larger, more technically savvy organizations.

In response to a question regarding developing standardized metrics and incorporating customer feedback into the TA Services program, the IOUs agreed that standardized metrics would be developed to assist with the evaluation process and customer feedback would be collected via surveys, aiming for continuous improvement, adding that ongoing communication with TA Advisors will also assist IOUs understanding of customer perspectives.

Addressing affordability and economic challenges for lower-income, disadvantaged, and hard-to-reach customers, the IOUs explained that while TA Services is an advisory program and does not offer direct rebates, it will help customers identify and access available funding sources. Participants recommended adding resources for financial assistance and local rebate programs into the TA Services resource library.

A local agency representative raised concerns about project status transparency and timely information for grant-dependent projects, urging the IOUs to facilitate direct partnerships with local agencies to eliminate barriers. Both PG&E and SCE expressed willingness to support such collaborations, recognizing the importance of streamlined communication channels.

Finally, a participant asked how the TA Services program will affect energization timelines and project milestones. IOUs clarified that while the Energization Rulemaking (R.24-01-018) sets utility milestones, it does not dictate customer timelines, and TA

Services is positioned to help customers navigate their obligations and accelerate project deployment.

IV. Appendix A: Workshop – Joint IOU Technical Assistance (TA) Services Deck

**Attachment 2
Appendix A**

**Technical Services (TA)
02-03-26 Workshop Presentation Slides**



Workshop – Joint IOU Technical Assistance (TA) Services

Tuesday, February 3, 2026



For a Better Meeting Experience



For technical support, chat "Elise Emil/PacifiCorp" as recipient, and send your message



There will be open Q&A at the end of each section as well as at the end of the workshop, but questions are welcome in the chat at any time



During open Q&A, speak by clicking the "Raise Hand" in the tool bar and unmuting yourself



Copy of the deck slides will be provided after the workshop



Safety Message

Burn Awareness Week (Feb 1–7, 2026)

- ⚠️ **Stay Aware Around Charging Equipment:** Keep cords dry, inspect for damage, and avoid tripping hazards.
- 🔥 **Prevent Burns:** EV batteries, chargers, and connectors can become hot
- 🔧 **Handle with care and avoid touching metal components after heavy use.**
- 🚒 **Fire Safety:** Know the location of fire extinguishers and ensure they are inspected.
- 🔥 **If an EV begins to overheat:**
 - 👤 **Move people away from the vehicle**
 - 💧 **Do not cool the battery with water**
 - 🚒 **EV battery fires require specialized response**
 - 🔧 **Never attempt to open or access EV battery components**



Agenda

| TIMING | TOPIC | PRESENTER |
|---------------|---|--------------------------------|
| 9:05 – 9:10 | Agenda & Workshop Objectives | Patrick Pennel |
| 9:10 – 9:20 | Opening Remarks | Alice Reynolds, CPUC President |
| 9:20 – 9:40 | Regulatory Background, Vision & Goals for TA Services | Maura Eisele |
| 9:40 – 10:30 | IOU TA Framework and Services | Patrick Pennel |
| 10:30 – 10:40 | Break | |
| 10:40 – 11:10 | Energization & Interconnection Assistance | Kati Pech |
| 11:10 – 11:20 | Considerations for Small IOUs | Matt Newberry |
| 11:20 – 11:30 | CCA Engagement | Maura Eisele |
| 11:30 – 12:30 | Lunch | |
| 12:30 – 12:55 | ME&O Strategy | Kati Pech |
| 12:55 – 1:05 | Timeline for TA Program Launch | Patrick Pennel |
| 1:05 – 1:25 | Open Q&A Discussion | Maura Eisele |
| 1:25 – 1:30 | Closing | Kati Pech |





Workshop Objectives



Workshop Objectives

Equip stakeholders with a clear understanding of the IOUs' Technical Assistance (TA) program offerings, the program's role in supporting transportation electrification, and provide a forum for questions and feedback.





Opening Remarks

CPUC President Alice Reynolds



Regulatory Background, IOU Vision & Goals for Transportation Advisory (TA) Services



TA Services Program Requirements

D. 22-11-40 Program Scope

- 1) Basic Technical Assistance
- 2) Planning load management and other Vehicle-Grid Integration (VGI) considerations
- 3) Help with choosing rates
- 4) Support with walking through the IOU interconnection and energization processes
- 5) Support and advisory services during planning, installation, and post-deployment
- 6) Operations post-deployment, like load management, and future fleet electrification
- 7) Available Automated Load Management (ALM) and Distributed Energy Resources (DER) options to lower deployment costs

D. 25-12-005 Additional Program Requirements

- 1) IOU discretion to narrow the scope of TA Services from those envisioned in D.22-11-040 if this allows them to better tailor services to support timely energization



Program Handbook Requirements

D. 22-11-40

- Scope of IOUs' TA programs
- Joint requirements and processes for speaking with customers about TA
- Defined channels of communication between each IOU's TA and each CCA in their territory
- Established practices for how to work directly with each CCA in an IOU's territory in discussing rates and directing customers to a CCA when necessary
- Defined channels of communication between each IOU's TA and the Program Administrator
- Guidelines for how the IOUs' TA programs should engage with the private market of Electric Vehicle Service Providers (EVSPs) and Demand Response providers
- Details and requirements for customer load management plans
- Load management and VGI targets/metrics

D. 25-12-005

- Timeline for program launch
- Proposals for development and management of Marketing Education & Outreach (ME&O) plan
- Proposals for development of outreach materials and efforts
- Detailed budget that provides breakdown of proposed ME&O efforts
- Planned data collection strategies to track TA program impact
- Any additional efforts needed to ensure customers are aware of TA

IOU TA Vision

Support customer success in transportation electrification by acting as a trusted advisor, delivering timely, targeted technical assistance, and guiding customers through the energization process to accelerate projects



What informs the IOU TA Vision?



TA Goals



What role are IOUs positioned to play?

- Since 2016, the IOUs have been assisting customers accelerate their transportation electrification transition
- deep experienced in deploying charging infrastructure
- Providing support with electricity
 - pricing plans
 - energy services (e.g. DR, VGI, etc.)
 - IOU energization process



How do IOUs see their TA goals as filling gaps in the larger TE landscape?

- Prepare customers to correctly and effectively enter the IOU processes for EV charger installation
- Provide comprehensive technical assistance from planning through post-installation
- Allow external stakeholders to provide input prior to launch



Questions for Discussion: Regulatory Background, IOU Vision & Goals for TA Services



Are there *any questions about the background or goals* for TA services that anyone would like to discuss?



Are there comments or suggestions on the *handbook* topics?



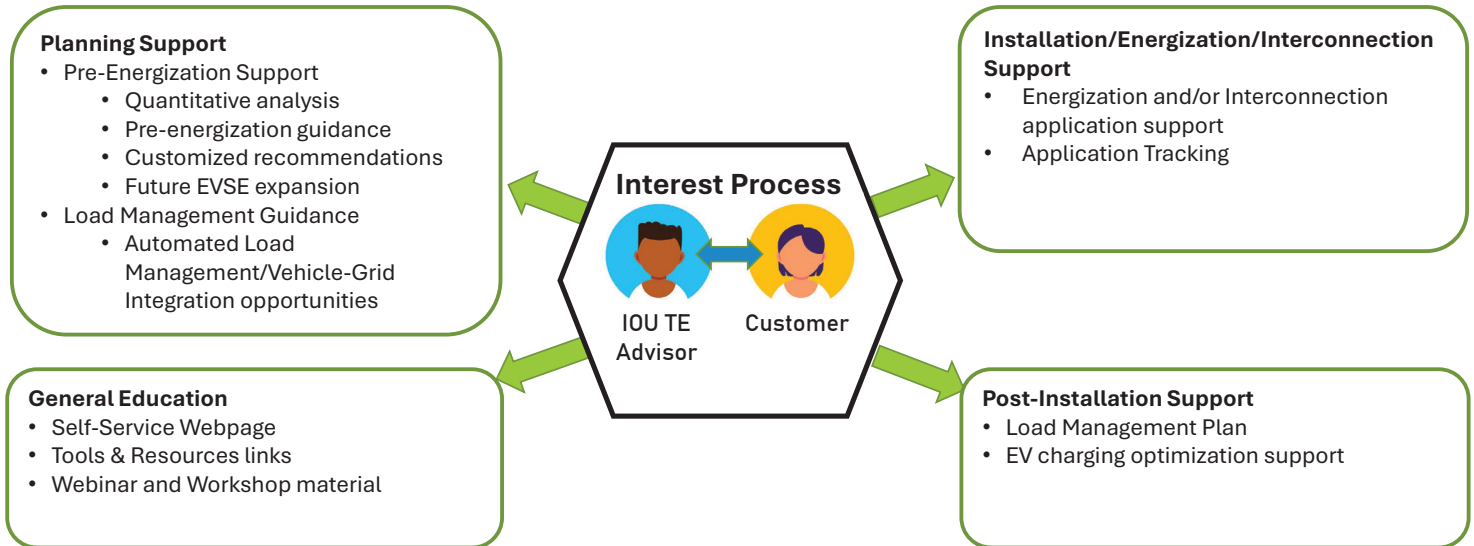


IOU TA Framework and Services



IOU TA Framework

Dedicated TE Advisor will work with customers to determine the level of support needed and provide commensurate support

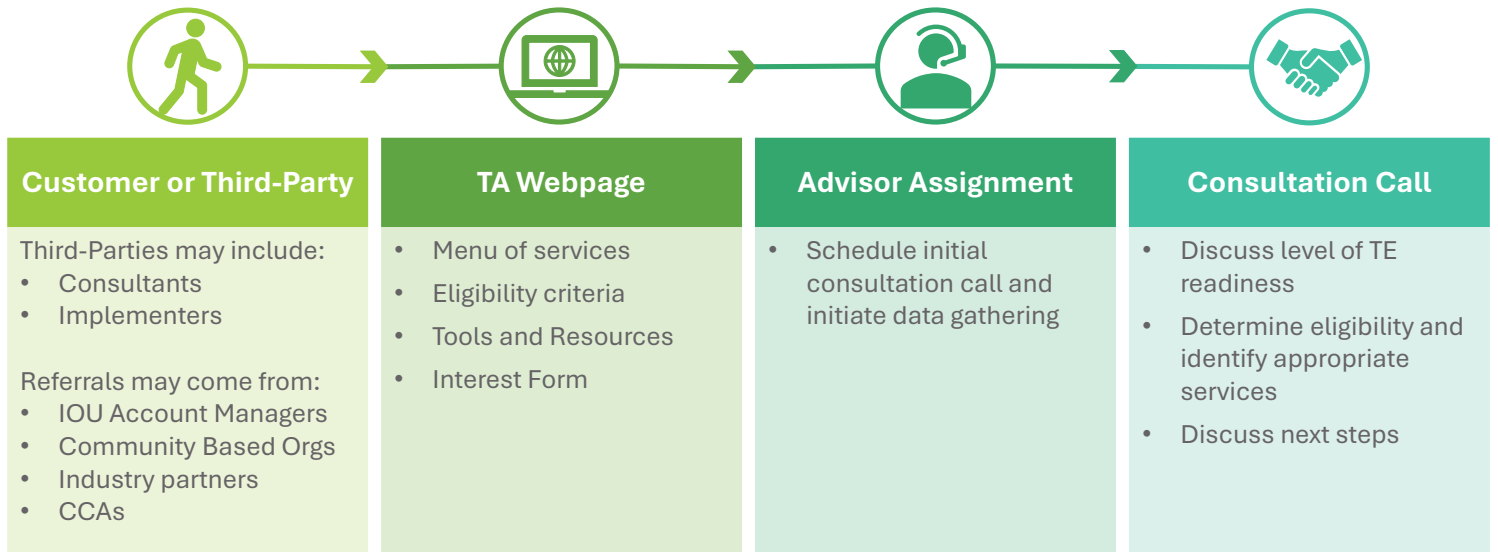




TA Interest Process



Overview: TA Interest Process



Questions for Discussion: TA Interest Process



Does the interest process appear *simple and accessible* for customers and third-parties?



What does *appropriate consent* look like if a third-party is submitting on behalf of customer?



Are there any steps in the interest process that potentially *present barriers* to initiating request for TA services?



Are there *any other considerations* the IOUs should take into account for the interest process?



General Education



Overview: General Education

General Education on TA may include:

- Self-service videos & tools:
 - Online tools and calculators (e.g. total cost of ownership calculators)
 - Educational videos focused on educating customers about available tools and resources to accelerate their TE journey
- In-person & online workshops and webinars:
 - Interactive webinars to educate customers on TE-related topics (e.g. new incentives & funding opportunities, updates to existing TE programs, regulatory updates)
 - Targeted in-person workshops focused on key opportunities to accelerate customers' TE journey (e.g. IOU energization application prep)



Example: General Education

- [PG&E Fleet Electrification Guidebook 2025:](#)
 - Online resource to assist fleet customers in navigating the electrification process
 - Guidance on selecting appropriate vehicles and chargers, setting up charging infrastructure, and post-deployment operations
- [PG&E Fleets](#) - EV Fleet Savings Calculator:
 - Total cost of ownership calculator
 - Additional information on planning considerations, grants & incentives, and available vehicles
- [TE Advisory Services Webinar:](#)
 - Webinars may cover a variety of topics technical applications to funding opportunities to program- or tariff-specific assistance



Questions for Discussion: General Education



Does the general education framework appear *interesting and valuable* for customers and third-parties?



What additional topics would be valuable for the IOUs to make available to TE customers?



What format/s would be most useful for customers to consume educational content?



Are there *any other considerations* the IOUs should take into account when developing general education content?



Pre-Energization Support Services



Overview: Pre-Energization Support

Pre-Energization Support may include:

- Quantitative & qualitative analysis of proposed TE projects
 - Charger and vehicle selection considerations
 - Charger location
 - Infrastructure sizing
- Guidance on energization pathways
 - Applicable IOU programs & tariffs
- Identifying grant and rebate opportunities
- Load management guidance
- Access to TE Advisors
- Actionable Next Steps



Example: EV Readiness Study (EVRS)

What is the objective of an EVRS?

Provide planning support and advisory services to multi-unit dwelling (MUD) property owners, MUD-serving public location owners or medium- and heavy-duty fleet customers in determining the feasibility of their specific electrification project

What content is in an EVRS?

- 1:1 consultation call with IOU TE Advisor
- Study of customer's project with site-specific recommendations and list of resources. Study elements may include:
 - Customer & Site Information
 - TE Analysis
 - Grant/Rebate Opportunities
 - VGI Enablement & Options
 - Customer Next Steps

The screenshot shows a report from Edison Energy for 'What's Ahead?' titled 'Transportation Electrification Advisory Services'. It includes sections for 'Vehicle Availability', 'Customer Information', 'Fleet Information', and 'Fleet'. The 'Fleet' section features a bar chart comparing 'Electricity vs. Diesel Fuel Costs' over 10 years, showing a significant cost saving for electric vehicles. The report also includes 'Auditor Notes' and a page number 'Page 1 of 3'.

Customer Information:
 Company Name: ROYAL PAPER BOX
 Site Address: 1033 S MAPLE AVE, MONTEBELLO, CA 90640
 Contact: John Smith, 323-456-7890

Fleet Information:
 Number of Vehicles: 42 (Total to be analyzed)
 Vehicle Information: Class 5 Truck - (Lifetime of 15 years)
 Vehicle Operators: 2 workdays/week, 200 avg. daily miles/vehicle

Fleet:
 Over 10 years, you could save approximately \$_____ in fuel costs by going electric.

Electricity vs. Diesel Fuel Costs (\$)

| Category | Value |
|--------------------------------------|-----------|
| Current Diesel Fuel Costs (10 years) | \$149,844 |
| Electricity Costs (10 years) | \$82,588 |
| Vehicle | TOU-EV-8 |
| Weight | 49 tons |
| Miles per Day | 56 |

Auditor Notes:
 This study analysis is based on applicable Southern California Edison (SCE) Data. Vehicle Values were provided by Bluebird as high fuel consumption for comparison purposes and are not intended to represent actual vehicle performance. The analysis is based on information provided and cannot be held responsible for changes in availability, pricing, and regulations over time. SCE and other utility providers are subject to change and are not intended to be the only source of information. Please contact your account manager for more information. This study is for informational purposes only and does not constitute a recommendation or guarantee of any kind.

Page 1 of 3



EVRS Continued

Inputs from Consultation Call:

- Customer Name
- Property ownership (rent, lease, other)
- Current EV/EVSE count, proposed location & details, if any
- Planned EV count, class, model year, and operations

Example Output Resources and Recommendations:

- TE Advisor contact information
- Estimated number of EVSE ports & power ratings
- EVSE Approved Product List
- Site plan
- Approximate locations of EVSE and infrastructure
- Estimated available capacity
- Regulatory considerations - American with Disabilities Act (ADA), Authorities Having Jurisdiction (AHJ), CARB, etc

Vehicle Availability

• One of the first steps is determining which EVs are the best fit for your business. You will want to consider how much energy each vehicle will need to operate on an average day, and how much time it will take for that vehicle to charge.

Customer Information

Company Name: ROYAL PAPER BOX
 Address: 1022 S MAIN ST, SUITE 100
 MONTROVILLE, CA 94040
 Contact: John Smith, 123-456-7890

Fleet Information

Number of vehicles: 10 (Listed for analysis)
 Vehicle Information: Class 3 Truck - (Between 10 years)
 Usage: 5 workdays/week, 200 avg. daily miles/vehicle

Fleet

Over 10 years, you could save approximately \$____ in fuel costs by going electric.

Auditor Notes

Additional notes and recommendations may be provided here.

Advisor Notes may be utilized after each section for the TE Advisor to provide additional customer and site-specific information and recommendations.



Questions for Discussion: Pre-Energization Support



Do the pre-energization support services appear *interesting and valuable* for customers and third-parties?



What additional services would be valuable for the IOUs to make available to TE customers?



What format/s would be most useful for customers to consume pre-energization support?



Are there *any other considerations* the IOUs should take into account when developing pre-energization support services?



Post-Energization Support Services



Overview: Post-Energization Assistance

Post-Energization Assistance may include:

- Current IOU services:
 - Self-service tools (e.g. TCO calculators)
 - Comprehensive rate analysis (requested through IOU processes)
- Educational content for customers with deployed EVs based on customer interest
- Some IOUs can offer a post-installation refresh through TA Services:
 - Load Management Plan (LMP)
 - EV Readiness Study (EVRS)



Example: Load Management Plan

Pre-Installation Load Management Guidance

- Provides basics of managed charging, EV TOU rates and Automated Load Management (ALM)/Demand Response (DR)/Vehicle Grid Integrations (VGI) options available at the IOU

Required Customer Information Post-Install for LMP

- Several months of operational charging data (e.g. 6 months)
- Site information for where EVSE was deployed
- Account and meter numbers
- EVSE operating schedule
- Quantity and type of EVSE deployed
- Quantity and type of vehicles deployed

What will the LMP look like?

- Email and/or report package:
 - Available rate options
 - Informational videos (*if available*)
 - Informational case studies (*if available*)
 - Available ALM/DR services
 - Available VGI opportunities
- Review call (*if requested*)

Sample LMP Communication

Once an eligible customer has reached a stage where they can receive an LMP, each IOU prepares a custom package of material that outlines how a customer can implement load management based on the customer's situation. Below is an example of what it may look like:

Sent: 3/31/2025
To: Customer X
From: IOU

Based on the provided information, below is a load management plan (LMP) you can take advantage of. Please let us know if you would like a call to review this material:

Available rate options:

There are 3 TOU-EV Rate Options

| | | |
|--|--|--|
| TOU-EV-7 Rate Option <small>Available to customers with demand of 20 kilowatts (kW) or less.</small> | TOU-EV-8 Rate Option <small>Available to customers with demand of 20 to 50 kW.</small> | TOU-EV-9 Rate Option <small>Available to customers with demand of 50 kW or more.</small> |
|--|--|--|

TOU-EV rates are only applicable to sites with a dedicated meter for EV charging

TOU-EV rates are made up of three main charges:

- A monthly customer charge, which does not vary based on usage.
- Time-Of-Use (TOU) energy charges are the cost per kilowatt-hour (kWh) of energy used in each TOU period. TOU periods vary by time of day, day of the week, and season.

Informational Videos:

The Time-Of-Use (TOU) Rate

A monthly customer charge, which does not vary based on usage.

Time-Of-Use (TOU) energy charges are the cost per kilowatt-hour (kWh) of energy used in each TOU period. TOU periods vary by time of day, day of the week, and season.

Available Services and Opportunities:

EMERGENCY LOAD REDUCTION PROGRAM (ELRP)
A flexible way to get incentives for using less energy.

Southern California Edison's (SCE) Emergency Load Reduction Program (ELRP) is a flexible Demand Response (DR) program. When you participate in ELRP, not only do you conserve energy and help the environment, but you also receive financial incentives to use less energy during grid emergencies. While you're relieving stress on the grid to help prevent power shortages in your community, you'll earn \$2 per kilowatt-hour (kWh) reduced during ELRP events, with zero penalties if you can't participate.



Questions for Discussion: Post-Energization Assistance



Do the post-energization support services appear *interesting and valuable* for customers and third-parties?



What additional services would be valuable for the IOUs to make available to TE customers?



What format/s would be most useful for customers to consume post-energization support?



Are there *any other considerations* the IOUs should take into account when developing post-energization support services?



Break – we will resume at 10:27AM





Energization & Interconnection (E/I) Assistance



E/I Challenges for EV Projects

1. Customer uncertainty/hesitance to commit to an electrification plan (vehicles, chargers, location)
2. Confusion around requirements for energization and interconnection applications
3. Difficulty identifying and sourcing qualified engineers and contractors
4. Challenges obtaining easements from landlords or 3rd parties
5. Permitting holdups with local jurisdictions and agencies
6. Lack of understanding of technical and safety requirements
7. Potential for complexity between EV load, load management systems, and DERs

Solution: Provide EV customers with single-point of contact to provide comprehensive support prior to and during application for new EV service and/or interconnection application of V2G or supporting DERs

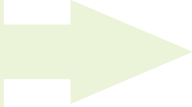


E/I Assistance

Objectives of E/I Assistance:

1. Address planning complexity to get customers to the point of application sooner
2. Improve application readiness to decrease overall energization/interconnection timelines
3. Address roadblocks in real time to keep projects moving forward and reduce cancellations

*What can an IOU
single-point of
contact do for a TA
Services E/I
customer?*



- ✓ Help customer prepare to submit complete application for service
- ✓ Educate the customer on what is needed to move forward on their specific project
- ✓ Provide updates to the customer on the IOU energization/interconnection process
- ✓ Investigate any delays on the IOU side and troubleshoot where possible

Questions for Discussion: E/I Assistance



Are there any challenges in the E/I process that are **currently being overlooked**?



What opportunities do third parties see for **greater E/I support** from the IOUs?



How can TE Advisors support customers through the E/I process **without introducing any additional complexity**?



Are there **any other considerations** the IOUs should take into account when creating an E/I Assistance framework?

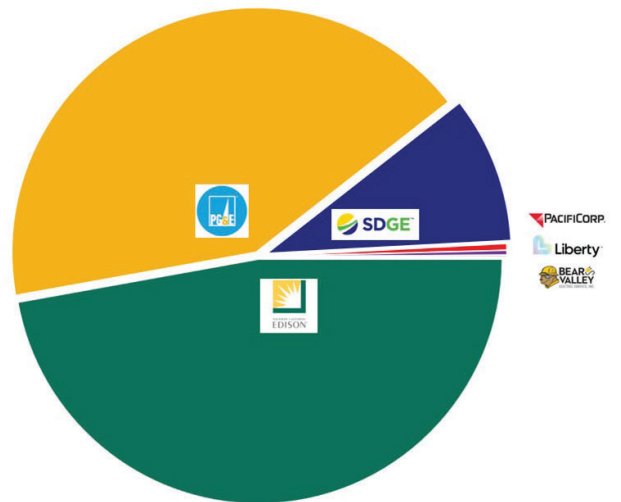


Considerations for Small IOUs



Small Multi-Jurisdictional Utilities (SMJU)

| Utility | Statewide Revenue | Approx. Customers |
|-------------|-------------------|-------------------|
| PacifiCorp | 0.431% | ~ 46,000 |
| Liberty | 0.313% | ~ 49,000 |
| Bear Valley | 0.1% | ~ 23,000 |



Additional SMJU TA Services Context

SMJU services will adhere to overall TA framework (Intake, Planning, Installation, Post-Installation)

Smaller budgets will require focused delivery of TA Services by SMJUs
Utilities support where required

Certain information is either uniquely available to, or best addressed by, utilities


Examples: capacity analyses, TE advisors, utility specific programs


Third-party implementers may be utilized as available and if cost effective


SMJUs exploring options for joint contracting


Examples: application intake, EV Readiness Studies, load management and route planning, self-service tools


Guiding Questions for Discussion – Considerations for Small IOUs


 Which proposed TA services are most valuable to participants?

 Which should be prioritized or are most critical?

 Are there services that are uniquely important for SMJU locations?

 What barriers/challenges would proposed TA services effectively address?

 What are concerns with the limitations of SMJU TA services?

 Would limitations to TA service scope inhibit activity at SMJU locations?



CCA Engagement



IOU Engagement with CCAs

D.12-12-036 adopted a code of conduct that governs the treatment of Community Choice Aggregators (CCAs) by electrical corporations, including how utilities may communicate with CCAs and CCA customers about CCA-related issues, such as rates and programs

| CCAs By IOU | | |
|--|---|--|
| PG&E | SCE | SDG&E |
| <ul style="list-style-type: none"> • Ava Community Energy • Central Coast Community Energy • CleanPowerSF • King City Community Power • MCE Clean Energy • Peninsula Clean Energy • Pioneer Community Energy • Redwood Coast Energy Authority • San Jose Clean Energy • Silicon Valley Clean Energy • Sonoma Clean Power • Valley Clean Energy | <ul style="list-style-type: none"> • Clean Power Alliance • Orange County Power Authority • Desert Community Energy • Lancaster Energy • Apple Valley Choice Energy • Pomona Choice Energy • Rancho Mirage Energy Authority • Pico Rivera Innovative Municipal Energy • Energy for Palmdales Independent Choice • San Jacinto Power • Santa Barbara Clean Energy | <ul style="list-style-type: none"> • San Diego Community Power • Clean Energy Alliance • Orange County Power Alliance |
| <p>Liberty Utilities (CALPECO Electric) LLC, Bear Valley Electric Service Inc and PacifiCorp d/b/a Pacific Power do not have any CCAs in their territory</p> | | |



Questions for Discussion: CCA Engagement



Does the approach to CCA engagement appear *valuable* for customers and third-parties?



Any suggestions on additional approaches to communication pathways?



Are there *any other considerations* the IOUs should consider when collaborating on customer referrals with CCAs?



Lunch Break

Resume at 12:30 PM



Marketing, Education, and Outreach Strategy



TEF TA ME&O Budgets

The ME&O Budget is set at 6% of the TEF TA Program budget or a total of \$2.16M across all IOUs.

| IOU | ME&O Budget | % |
|--|--------------------|-------------|
| SCE | \$1,019,520 | 47.2% |
| PG&E | \$913,680 | 42.3% |
| SDG&E | \$209,520 | 9.7% |
| Liberty Utilities (CalPeco Electric) LLC | \$6,480 | 0.3% |
| Bear Valley Electric Service Inc | \$2,160 | 0.1% |
| PacifiCorp d/b/a Pacific Power | \$8,640 | 0.4% |
| Total Statewide Budget | \$2,160,000 | 100% |

Given the large variances in available ME&O funds, tactics will vary significantly between IOUs.



TEF TA ME&O Decision Requirements

D.25-12-005 requires:

1. Proposals for development and management of the ME&O plan
2. Proposal for development of outreach materials and efforts
3. A detailed budget that provides a clear breakdown of the proposed ME&O efforts



ME&O Plan Development

- Based on past program implementation experience, flexibility in ME&O efforts is critical – programs need to adapt to what is or is not working well in order to make the most of available funds
- Upon approval of the TEF TA Handbook, each IOU will develop an ME&O plan including proposed outreach materials and anticipated budget
 - Plans will largely be informed by previous experience marketing EV programs
 - Each IOU may opt to make adjustments to their ME&O plans over time based on which tactics are delivering the best outcomes
 - *Detailed budgets will be provided when ME&O plans are finalized and may change over time*
- The ME&O plans will be socialized to each IOU's Program Advisory Council (PAC) for feedback



ME&O Tactics

Potential marketing tactics may include:

- Email or direct mail campaigns to target audience segments
- Social media campaigns using IOU social media channels as well as business-oriented platforms such as LinkedIn
- Event attendance such as ride-and-drives, sector-specific events focused on clean transportation, and EV industry events
- Utilization of community organizations to do grassroots customer engagement
- Partnerships with Grant Agencies, EVSPs, OEMs, or vehicle dealerships

Marketing materials may include:

- Program websites
- Resource toolkits (example, Fleet Electrification Guidebook)
- Banner and email advertisement copy
- Flyers and leave-behinds
- Testimonials and case studies



Questions for Discussion: ME&O Strategy



What tactics *would be the most effective for bringing awareness* to TA program offerings?



What considerations are there for *engaging with hard-to-reach customers* (rural, DAC, tribal, etc)?



What messaging *would be the most effective* when engaging with potential TA customers?



Are there *any other considerations* the IOUs should take into account when developing their marketing plans?



Timeline for TA Program Launch



Timeline for TA Program Launch

| Action | Timeline | Date |
|--|--|------------|
| D.25-12-005 | Effective date | 12/5/2025 |
| TA Workshop | Within 60 days of the effective date of this decision | 2/3/2026 |
| Workshop Report Submission | | 4/4/2026 |
| TA Handbook Submission Via Tier 3 Advice Letter | Within 120 days of the effective date of this decision | 4/4/2026 |
| TA Handbook Approval | TBD* - Pending Commission approval of Handbook AL | 7/3/2026* |
| Program Start | 90 days after the Commission's approval of the Program Handbook | 10/1/2026* |
| Program End | The three- year period for the program will begin 90 days after the Commission's approval of the Program Handbook. | 9/30/2029* |

*assumes 90 days for CPUC to approve the T3 AL for the TA Handbook





Open Q&A



Thank you for attending!

Patrick Pennel, SCE: patrick.pennel@sce.com

Maura Eisele, SDG&E: meisele@sdgecontractor.com

Kati Pech, PG&E: k3pm@pge.com

Matt Newberry, Liberty Utilities (SMJUs): matt.newberry@libertyutilities.com



Appendix



SCE Reference: TEAS Interest Process

- Landing page: [Transportation Electrification Advisory Services](https://sce.com/teas) (sce.com/teas)
- General Educational Information (e.g. [Fact Sheet](#))
- EVRS [info](#) and interest [form](#)
- LMP [info](#) and interest [form](#)

The screenshot displays the SCE TEAS website layout. On the left is the main landing page for 'Transportation Electrification Advisory Services', featuring a white truck and text about TEAS services. In the center is the 'EV Readiness Studies' page, which includes a form to request a customized study. To the right is the 'Access Our Free Services To Help You Apply For Competitive EV Funding' page, also featuring a form. Further right are sections for 'TE Advisory Services Webinars' and 'TE Advisory Services Grant Writing Webinar', each with a 'Watch Webinar Recording' link. At the bottom right is the 'TE Advisory Services Fact Sheet' page with a 'View Fact Sheet' link. The bottom of the page features logos for SDGE, Edison, PG&E, PacifiCorp, Bear Valley Electric Service, and Liberty.



Fleet Electrification Planning

In this initial phase, TEAS Advisors offer educational resources to help you understand the basics of fleet electrification, including how to get started

[Learn More](#)



Pre-Energization Support

This phase bridges the gap between planning and implementation, helping you prepare to make your fleet electrification project a reality

[Learn More](#)



Post-Energization Support

After a site is up and running, TEAS Advisors can continue to support you in optimizing operations, managing energy consumption, and training for operations and maintenance

[Learn More](#)



Utilizing Emerging Technology

TEAS Advisors can guide you through evaluating innovative and advanced technologies including Automated Load Management (ALM) and Distributed Energy Resources (DERs) to help manage energy resiliency

[Learn More](#)

SDG&E Reference: TEAS

Landing Page- teas.sdge.com

[Interest Form](#)



PG&E Reference: EV Advisory Services

PG&E's [EV Advisory Services](#) offers personalized guidance from an EV Advisor who can help you switch your medium- and heavy-duty fleets to electric vehicles (EVs).



One-on-one support throughout your project

\$0.00

No cost and no obligation to participate



Customers can sign up through 2026

Services include:

- Education on fleet electrification, EV charging, load management, vehicle-to-grid integration
- Site capacity assessments
- Support submitting and tracking your EV service application
- Rate and charging optimization analysis

Interested in learning more?

Email us at EVAdvisoryServices@pge.com or sign up at www.pge.com/evfasapp

