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R2106017

BEFORE THE PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA

Order Instituting Rulemaking to
Modernize the Electric Grid for a High
Distributed Energy Resources Future.

Rulemaking 21-06-017

**ADMINISTRATIVE LAW JUDGE'S RULING CORRECTING DISTRIBUTION
PLANNING ADVISORY GROUP SCHEDULE FOR 2023-2024 DISTRIBUTION
INVESTMENT DEFERRAL FRAMEWORK CYCLE**

This ruling adopts a corrected Distribution Planning Advisory Group Schedule for the 2023-2024 Distribution Investment Deferral Framework Cycle (DPAG Schedule for 2023-2024 DIDF Cycle), which is appended to this ruling as Attachment A.

The May 19, 2023 *Administrative Law Judge's Ruling on Recommended Reforms for the 2023 Distribution Investment Deferral Framework Process, the Partnership Pilot, and the Standard-Offer-Contract Pilot* (2023 DIDF Reform Ruling) adopted an updated DPAG Schedule for 2023-2024 DIDF Cycle (*see* Ruling Paragraph No. 2) that included dates for the Standard-Offer-Contract pilot. However, the 2023 DIDF Reform Ruling determined that, "to ensure protection of ratepayer funds, the Standard-Offer-Contract pilot should not be continued, and no further solicitations should occur." Accordingly, this ruling corrects the DPAG Schedule for 2023-2024 DIDF Cycle) to delete references to the Standard-Offer-Contract pilot.

Attachment A

Distribution Planning Advisory Group (DPAG) Schedule for 2023/2024

Distribution Investment Deferral Framework (DIDF) Cycle

(corrected) DPAG Schedule for 2023/2024 DIDF Cycle

| Activity | Date |
|---|--|
| Pre-DPAG 2023 | |
| <ul style="list-style-type: none"> • Joint Utility proposal on Integrated Energy Policy Report (IEPR) scenarios to apply to the 2024 Grid Needs Assessment/Distribution Deferral Opportunity Report (GNA/DDOR) filings (due 5/12/2023) • DIDF Reform Ruling | May 2023 |
| <ul style="list-style-type: none"> • Distribution Forecasting Working Group workshop (final workshop date to be determined in coordination with the Energy Division) • Draft Independent Professional Engineer (IPE) Plan | Week of May 22, 2023 |
| Utilities submit DIDF Procurement Status Report to Energy Division, IPE, and Independent Evaluators (IEs) (every 6 months) | May 15, 2023 |
| Stakeholder comments on Joint Utility proposal for IEPR scenarios to apply to the 2024 GNA/DDOR filings | June 24, 2023 |
| Prescreening period for Partnership Pilot ¹ | July 15, 2023 to August 15, 2023 |

¹ Prescreening Application and other information regarding the Partnership Pilot can be found at: (1) PG&E website, here: https://www.pge.com/en_US/residential/save-energy-money/savings-programs/savings-programs-overview/partnership-pilot.page; (2) SCE's website, here: <https://www.sce.com/business/savings-incentives/integrated-distributed-energy-resources-partnership-pilot>; and (3) SDG&E's website, here: <https://www.sdge.com/partnership-pilot#apply>.

(corrected) DPAG Schedule for 2023/2024 DIDF Cycle

| Activity | Date |
|---|----------------------------|
| <ul style="list-style-type: none"> • Energy Division approval or modification of Joint Utility proposal for IEPR scenarios to apply to the 2024 GNA/DDOR filings • IE Post-Procurement Utility Comparison Report (comparing Utility procurement approaches and reporting on all procurement outcomes to date) | August 1, 2023 |
| DPAG 2023 | |
| <ul style="list-style-type: none"> • Utility GNA/DDOR filings • Final IPE Plans circulated | August 15, 2023 |
| Utilities update Distribution Resources Plans (DRP) Data Portals with GNA/DDOR data | August 30, 2023 |
| IPE Preliminary Analysis of GNA/DDOR data adequacy circulated | September 5, 2023 |
| <ul style="list-style-type: none"> • Utilities launch Request for Offer (RFO) bids due no sooner than 75 days after launch or November 30, 2023) • Utilities update Participation Pilot website with prescreened aggregator contact information | September 15, 2023 |
| DPAG meetings with each Utility Note: Utilities to provide workshop participation details and complete agendas for each meeting to the Service List at least 10 days in advance of the first meeting. | Mid to Late September 2023 |
| Participants provide questions and comments to Utilities and IPE | September 25, 2023 |
| Utility responses to questions | October 5, 2023 |

(corrected) DPAG Schedule for 2023/2024 DIDF Cycle

| Activity | Date |
|---|---|
| <ul style="list-style-type: none"> • Follow-up utility meetings via webinar (optional)² • Optional due date for line section data supplement to GNA/DDOR (October 15, 2023) | <p style="text-align: center;">Week of October 15, 2023</p> |
| <p>IPE DPAG Reports</p> | <p style="text-align: center;">November 8, 2023</p> |
| <p style="padding-left: 40px;">Tier 2 Advice Letters:</p> <ul style="list-style-type: none"> • (1) “First” Advice Letter for approval to launch subscription periods for Partnership Pilot. If applicable, also to seek approval to launch RFOs for planned investments elevated to Tier One candidate deferral opportunities during the DPAG • (2) “Second” Advice Letter for approval not to launch RFOs or Partnership Pilots for any remaining planned investments or candidate deferral opportunities identified in the GNA/DDOR filings, by DPAG stakeholders, or by Energy Division (i.e., any not included in the “First” Advice Letter) <p style="padding-left: 40px;">Procurement Status:</p> <ul style="list-style-type: none"> • Utilities submit DIDF Procurement Status Report to Energy Division, IPE, and IEs (every 6 months) | <p style="text-align: center;">November 15, 2023</p> |

² The utilities will coordinate with the Energy Division on the potential need for follow-up webinars.

(corrected) DPAG Schedule for 2023/2024 DIDF Cycle

| Activity | Date |
|--|---|
| Post-DPAG 2023 | |
| Utilities provide draft second-round RFO launch materials to Energy Division for approval in consultation with IPE and IE (if second round needed) | December 10, 2023 |
| <ul style="list-style-type: none"> • Utilities launch second round of RFOs for DERs (if needed pursuant to the DIDF Advice Letter outcomes) • Utilities launch Partnership Pilot subscription periods | January 15, 2024 (or within 30 days of DIDF Advice Letter approval if approval is after December 15, 2023) |
| <ul style="list-style-type: none"> • Utility Presentation to Procurement Review Group of Project Shortlist for first-round (2023) RFO <p>Note: If second round RFO occurs, Procurement Review Group presentation occurs within 5 months of approval to launch the second RFO.</p> | January 2024 |
| <ul style="list-style-type: none"> • Information-Only submittal notification of executed contracts for first round (2023) RFO solicitations <p>Note: If second round RFO occurs, Information-Only submittals are due within 6 months of approval to launch RFO.</p> | February 15, 2024 |
| Partnership Pilot websites updated advertising subscription period launch, and notices availability of procurement tranches | February 15, 2024 (or within 30 days of subscription period launch) |

(corrected) DPAG Schedule for 2023/2024 DIDF Cycle

| Activity | Date |
|--|----------------|
| <ul style="list-style-type: none">• Utility Annual Partnership Pilot Evaluation Reports• IE DIDF RFO Reports• IPE Post-DPAG Report (covering all three Utilities) Note: If second round RFO occurs, IE DIDF RFO Report is due within 60 days of RFO contract execution or RFO completion without contracts | March 15, 2024 |
| IE Annual Partnership Pilot Evaluation Reports | March 25, 2024 |
| Annual DIDF and Pilot reform comments | April 1, 2024 |
| Annual DIDF and Pilot reform reply comments | April 15, 2024 |
| DIDF and Pilot Reform Ruling | May 2024 |

(End of Attachment A)