



ALJ/GT2/abb 3/10/2026

**FILED**

03/10/26

**BEFORE THE PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA**

03:40 PM  
A2601003

Pacific Gas and Electric Company's  
(U-39 M) Application for Approval of its  
2028-2033 Income-Qualified Programs

Application 26-01-003

And Related Matters.

Application 26-01-005

Application 26-01-010

Application 26-01-011

**ADMINISTRATIVE LAW JUDGE RULING DIRECTING PARTIES TO  
CONSIDER DRAFT SCOPE AND SCHEDULE**

This ruling sets forth a draft list of issues and a preliminary schedule, for party consideration prior to the March 12, 2026 prehearing conference (PHC). The purpose of the PHC is to review the preliminary scope and schedule of the consolidated proceeding and to address any other procedural issues with the goal of thoughtfully and efficiently resolving the 2028-2033 Income-Qualified Assistance Program applications of Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), and Southern California Gas Company (SoCalGas), (collectively, the Utilities). We will not delve into the merits of any substantive issues raised in these applications.

**1. Procedural and Factual Background**

On January 9, 2026, PG&E and SCE filed their respective applications requesting approval and funding for their Income-Qualified Assistance Programs portfolios for 2028-2033. SoCalGas and SDG&E filed their respective

applications on January 16, 2026. These proceedings were consolidated on February 10, 2026. A virtual PHC is scheduled for Thursday, March 12, 2026, commencing at 10 A.M., to determine the parties, discuss the preliminary scope and schedule of the proceeding, and other procedural matters.

## **2. Topics to be Discussed at Pre-hearing Conference**

Parties shall be prepared to discuss the matters below.

### **2.1. Procedural Issues**

- a. Procedural schedule for the Full-Cycle Income Qualified Programs (IQPs) Funding Applications;
- b. Scope of issues;
- c. Any outstanding procedural matters;
- d. Need for evidentiary hearings;
- e. Discovery issues; and
- f. Any other matters parties wish to discuss at the PHC.

### **2.2. Draft Scoping Issues**

1. California Alternate Rates for Energy Program (CARE)
  - a. Whether the proposed CARE program budgets, enrollment goals, design and implementation, and associated performance standards are reasonable and should be adopted; and
  - b. Whether the funding level for the CHANGES program is reasonable and appropriate, and should the program's evaluator selection and procurement oversight process be modified?
2. Family Electric Rate Assistance Program (FERA)
  - a. Whether the proposed FERA program budgets, enrollment goals, design and implementation, and associated performance standards are reasonable and should be established; and
  - b. How should the FERA program reporting requirements be altered to implement Senate Bill 1130 (2024)?
3. Energy Savings Assistance Program (ESA)

- a. Whether the proposed ESA program budgets, enrollment goals, design and implementation, and associated performance standards are reasonable and should be established;
  - b. Whether modifications should be made to the ESA program related to the establishment of uniform standards; health, comfort, and safety measures; and/or focus on prioritized and targeted populations;
  - c. Whether the proposed multifamily program designs and modifications are reasonable and should be established, including transition to a local administration model;
  - d. Whether the Utilities should be granted flexibility to make ESA program adjustments (including fund shifting and measure modifications) via advice letters and regulatory reports;
  - e. Whether the ESA fund shifting, expense cap, and carryover rules should be standardized and/or modified;
  - f. Whether the treatment of unspent and uncommitted funds should be modified or clarified; and
  - g. Whether ESA electrification or other pilot proposals, including the use of uniform standards, should be approved and adopted under the ESA program.
4. Other CARE/ESA/FERA Issues
- a. Whether SCE's proposal to implement a new upfront eligibility verification process is reasonable and should be adopted;
  - b. Whether proposed budgets and activities for income-qualified program evaluations, studies, working groups, and reporting are just and reasonable and should be adopted;
  - c. Whether the IQP budgets should continue to fund the Joint Stipulation with the California Emerging Technology Fund for affordable broadband support activities, and at what amount;
  - d. Whether the Utilities should be required to submit a summary of proposed actions based on findings and recommendations from the Low Income Needs Assessment Study for improvements to the IQPs;

- e. Whether the proposed cost recovery methods for IQP programs for 2028 and beyond are reasonable and should be adopted;
  - f. Whether the proposed pilots and studies are reasonable and should be approved;
  - g. Whether the proposed programs take into consideration the Commission's Environmental and Social Justice Action Plan and Executive Order N-5-24;
  - h. Whether any compliance items may be sunsetted or modified, including cost-effectiveness reporting;
  - i. Whether an IQP Working Group should be established, replacing the ESA Working Group, including the convening of regular public meetings in addition to an annual report meeting;
  - j. Whether budgets should be approved through 2031, 2032 or 2033;
  - k. Whether modifications should be made for any mid-cycle review process;
  - l. Whether the process for updating CARE, FERA, and ESA income eligibility levels, as required by Resolution E-3524, should be modified; and
  - m. What processes and schedule should be laid out for the next IQP application cycle?
5. Concurrent Application System
- a. Whether the Concurrent Application System (CAS) proposed budget and plan for ongoing implementation (operations and maintenance, performance tracking, and marketing, education, and outreach) are just and reasonable and should be adopted;
  - b. Whether enhancements should be made to the CAS Phase I platform to help reduce administrative burden, improve program coordination and cross program enrollment, and reduce overall marketing, education, and outreach enrollment expenditures; and
  - c. How the CAS platform should be managed during ongoing operations and maintenance, including decision making authority for prioritization of fixes and any identified enhancements.

6. Data Sharing

- a. Whether Utilities should increase data sharing with categorical programs and other Utilities income-qualified programs, and for what purposes or outcomes should this data be used or not used (income verification, lead generation, automatic enrollment, general targeting of eligible households);
- b. Whether a third-party income verification service that includes data sharing with categorical programs should be available to ESA, CARE, and FERA customers, either through an enhancement to CAS or through individual Utility contracts; and
- c. What policy framework should the Commission adopt to modernize categorical eligibility for CARE, FERA, and ESA, including the criteria and process for evaluating public assistance programs and updating the categorical eligibility program list on an ongoing basis?

7. Definitional Issues

- a. Legal Interpretation of “substantially the same” as used in Public Utilities Code Section 739.1(f)(1), for purposes of determining which programs can be used for categorical eligibility, including whether statute requires the income thresholds of categorical eligibility programs to perfectly align with the income threshold of the income-qualified program.
- b. Definition of “income” as used in Public Utilities Code Section 739.1(a) and 739.12(a) for purposes of determining eligibility for the CARE and FERA programs.
- c. Definition of “household” sizes as used in Public Utilities Code Section 739.1(a) and 739.12(a) for purposes of determining eligibility for IQPs.

### 2.3. Draft Schedule

Below is the proposed schedule. Parties shall comment on the schedule, in addition to identifying a need for, and date for, any additional events such as workshops or public participation hearings.

EVENT	DATE
Prehearing Conference	March 12, 2026
Scoping Memorandum and Ruling	April 2026
Opening Briefs due on Definitional Questions	May 8, 2026
Reply Briefs due on Definitional Questions	June 5, 2026
Ruling on Definitional Questions	June 2026
Investor-Owned Utility Supplemental Testimony	July 10, 2026
Intervenor Testimony	September 11, 2026
Rebuttal Testimony	October 16, 2026
Deadline to File Motion for Evidentiary Hearings	November 9, 2026
Evidentiary Hearings, if needed	November 18-19, 2026
Opening Briefs Due	December 18, 2026
Reply Briefs Due	January 22, 2027
Proposed Decision	Q2 2027

### 3. Pre-hearing Conference

This ruling confirms the virtual Webex PHC for Thursday, March 12, 2026, commencing at 10 A.M., to determine the parties, scope and schedule of the proceeding, and other procedural matters.

Any person may join the PHC using the following information:

- **Meeting Link for Video/Audio:** <https://cpuc.webex.com/cpuc/j.php?MTID=maec582252a4a45da8a3ba072a045554a>

Event password: 032026

Event number: 2493 414 4015

- Audio-Only Option:

Toll-Free: 855-282-6330

Toll: 415-655-0002

Access Code: 249 341 44015

Party representatives should plan to log into the PHC by 9:45 a.m. on the day of the PHC. Once logged in, Commission Staff will provide the designated party representatives with participant Webex access. The Commission's Help Line will open 30 minutes in advance of the PHC (at 9:30 a.m.) to assist parties with any difficulties logging in (415-559-2703).

Entities need not have achieved party status prior to the PHC in order to speak at the PHC. Each organization must select one individual to speak on its behalf during the PHC.

Because of the virtual format, this PHC will necessarily be more formal than an in-person PHC. Representatives are reminded that the court reporters will need to transcribe the proceedings, and therefore individuals should adhere to the following ground rules:

- Speak only when addressed by the Administrative Law Judge;
- Identify yourself before speaking (each time);
- Avoid using a speakerphone when speaking;
- Mute conference line when not speaking;
- Speak slowly and clearly;
- Do not interrupt or speak over one another; and
- Expect court reporters to interrupt, if necessary, to fill in garbled or inaudible statements.

