


BEFORE THE PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA

Order Instituting Rulemaking to Refine the Risk-Based Decision-Making Framework for Electric and Gas Utilities.	FILED Rulemaking 26-04-008/16/26 (Filed April 30, 2026) 4:05 PM R2604016
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**NOTICE OF INTENT TO CLAIM INTERVENOR COMPENSATION
AND, IF REQUESTED (and [X]¹ checked), ADMINISTRATIVE LAW JUDGE'S
RULING ON THE UTILITY REFORM NETWORK'S SHOWING OF
SIGNIFICANT FINANCIAL HARDSHIP**

**NOTE: AFTER ELECTRONICALLY FILING A PDF COPY OF THIS NOTICE OF
INTENT, PLEASE EMAIL THE DOCUMENT IN AN MS WORD FORMAT TO THE
INTERVENOR COMPENSATION PROGRAM COORDINATOR AT**
Icompcoordinator@cpuc.ca.gov.

Customer or Eligible Local Government Entity (party intending to claim intervenor compensation): The Utility Reform Network (TURN)		
Assigned Commissioner: Christine Harada		Administrative Law Judge: Sarah R. Thomas
I hereby certify that the information I have set forth in Parts I, II, III and IV of this Notice of Intent is true to my best knowledge, information and belief.		
Signature:		/s/
Date: July 16, 2026	Printed Name:	Hayley Goodson

PART I: PROCEDURAL ISSUES
(To be completed by the party intending to claim intervenor compensation)

A. Status as “customer” (see Pub. Util. Code § 1802(b))² The party claims “customer” status because the party is (check one):	Applies (check)
1. A Category 1 customer is an actual customer whose self-interest in the proceeding arises primarily from his/her role as a customer of the utility and, at the same time, the customer must represent the broader interests of at least some other customers. See, for example, D.08-07-019 at 5-10).	☐

¹ DO NOT CHECK THIS BOX if a finding of significant financial hardship is not needed (in cases where there is a valid rebuttable presumption of eligibility (Part III(A)(3)) or significant financial hardship showing has been deferred to the intervenor compensation claim).

² All statutory references are to California Public Utilities Code unless indicated otherwise.

2. A Category 2 customer is a representative who has been authorized by actual customers to represent them. Category 2 involves a more formal arrangement where a customer or a group of customers selects a more skilled person to represent the customer's views in a proceeding. A customer or group of customers may also form or authorize a group to represent them, and the group, in turn, may authorize a representative such as an attorney to represent the group.	☐
3. A Category 3 customer is a formally organized group authorized, by its articles of incorporation or bylaws to represent the interests of residential customers or small commercial customers receiving bundled electric service from an electrical corporation (§1802(b)(1)(C)). Certain environmental groups that represent residential customers with concerns for the environment may also qualify as Category 3 customers, even if the above requirement is not specifically met in the articles or bylaws. See D.98-04-059, footnote at 30.	☒
4. The party's detailed explanation of the selected customer category. <u>The party's explanation of its status as a Category 1 customer.</u> A party seeking status as a Category 1 customer must describe the party's own interest in the proceeding and show how the customer's participation goes beyond just his/her own self-interest and will benefit other customers. Supporting documents must include a copy of the utility's bill. <u>The party's explanation of its status as a Category 2 customer.</u> A party seeking status as a Category 2 customer must identify the residential customer(s) being represented and provide authorization from at least one customer. <u>The party's explanation of its status as a Category 3 customer.</u> If the party represents residential and small commercial customers receiving bundled electric service from an electrical corporation, it must include in the Notice of Intent either the percentage of group members that are residential ratepayers or the percentage of the members who are receiving bundled electric service from an electrical corporation. Supporting documentation for this customer category must include current copies of the articles of incorporation or bylaws. If current copies of the articles and bylaws have already been filed with the Commission, only a specific reference (the proceeding's docket number and the date of filing) to such filings needs to be made. <i>TURN's Explanation of the Selected Customer Category</i> TURN is a Category 3 "group or organization authorized pursuant to its articles of incorporation or bylaws to represent the interests of residential ratepayers." TURN provided the relevant portion of our articles of incorporation in the NOI submitted in A.98-02-017, and again in A.99-12-024. On October 15, 2015, TURN's Board of Directors adopted amendments to TURN's bylaws and articles of incorporation.	

TURN provided these revised bylaws and articles of incorporation in an amendment to the NOI submitted in A.15-09-001. TURN believes the vast majority of our members are residential ratepayers. TURN does not poll our members in a manner that would allow a precise breakdown between residential and small business members, so a precise percentage is not available. Similarly, TURN believes that the vast majority of our members receive bundled electric service from an electrical corporation. TURN does not poll our members in a manner that would allow a precise breakdown between those who receive bundled electric service from an IOU, those who receive electric service from a municipal utility and gas service from an IOU, and those who might be a CCA customer or Direct Access customer.	
Do you have any direct economic interest in outcomes of the proceeding?³ If “Yes”, explain:	☐ Yes ☒ No
B. Conflict of Interest (§ 1802.3)	Check
1. Is the customer a representative of a group representing the interests of small commercial customers who receive bundled electric service from an electrical corporation?	☐ Yes ☒ No
2. If the answer to the above question is “Yes”, does the customer have a conflict arising from prior representation before the Commission?	☐ Yes ☐ No
C. Status as an Eligible Local Government Entity (§§1802(d), 1802.4, 1803.1)	
The party claims “eligible local government entity” status because the party is a city, county, or city and county that is not a publicly owned public utility that intervenes or participates in a Commission proceeding for the purpose of protecting the health and safety of the residents within the entity’s jurisdiction following a catastrophic material loss suffered by its residents either in significant damage to infrastructure or loss of life and property, or both, as a direct result of public utility infrastructure.	☐ Yes ☒ No
The party’s explanation of its status as an eligible local government entity must include a description of (1) The relevant triggering catastrophic event; (2) The impacts of the triggering catastrophic event on the residents within the entity’s jurisdiction as a result of public utility infrastructure; and (3) The entity’s reason(s) to participate in this proceeding.	
D. Timely Filing of Notice of Intent to Claim Intervenor Compensation (NOI) (§ 1804(a)(1)):	
1. Is the party’s NOI filed within 30 days after a Prehearing Conference? Date of Prehearing Conference: 6/17/2026	☒ Yes ☐ No

³ See Rule 17.1(f).

2. Is the party's NOI filed at another time (for example, because no Prehearing Conference was held, the proceeding will take less than 30 days, the schedule did not reasonably allow parties to identify issues within the timeframe normally permitted, or new issues have emerged)?	☐ Yes ☒ No
2a. The party's description of the reasons for filing its NOI at this other time:	
2b. The party's information on the proceeding number, date, and decision number for any Commission decision, Commissioner ruling, Administrative Law Judge's ruling, or other document authorizing the filing of NOI at that other time:	

PART II: SCOPE OF ANTICIPATED PARTICIPATION
(To be completed by the party intending to claim intervenor compensation)

A. Planned Participation (§ 1804(a)(2)(A)):

The party's statement of the issues on which it plans to participate:

The scope of this proceeding is currently unknown, as parties have proposed changes to the preliminary list of issues identified in R.26-04-016, and there are disputes among the parties as to the scope. Pending the issuance of the scoping ruling, TURN anticipates participating on the following issues if included in the scope:

- (1) RAMP and Rate Case Plan Schedule and Process, including changes to support implementation of Senate Bill 254
- (2) Improvements to RDF Benefit-Cost Ratio Calculations
- (3) Risk-Scaling (which TURN articulated as "Whether to adopt a uniform default Risk-Scaling approach for BCR calculations")
- (4) Improvements to the Budget-Constrained Portfolio Optimization requirements adopted in D.25-08-032
- (5) Risk Tolerance (which TURN opposed including in the scope but may address if included)

The party's explanation of how it plans to avoid duplication of effort with other parties:

TURN has already begun coordinating with other active parties around the scope and schedule issues. TURN will continue to coordinate with the other active parties to limit duplication and ensure that each party offers a unique contribution. TURN will also consult with other intervenors and explore opportunities to coordinate and develop joint positions as appropriate. As a general matter, TURN will do its best to minimize potential overlap in issues and to ensure that where such overlap occurs, each party is presenting a unique analysis.

The party's description of the nature and extent of the party's planned participation in this proceeding (to the extent that it is possible to describe on the date this NOI is filed):

TURN has already submitted opening and reply comments on the OIR, attended the prehearing conference, and participated in an extensive meet and confer process over scope and schedule. TURN intends to conduct discovery, participate in workshops, submit comments and reply comments, comment on any Proposed Decisions, and otherwise actively participate according to the procedural schedule set by the Commission and as TURN's resources permit.

B. The party's itemized estimate of the compensation that the party expects to request, based on the anticipated duration of the proceeding (§ 1804(a)(2)(A)):

Item	Hours	Rate \$	Total \$	#
ATTORNEY, EXPERT, AND ADVOCATE FEES				
Hayley Goodson, TURN Attorney	150	\$730	\$109,500	
Jalal Awan, TURN Energy & Climate Policy Analyst	100	\$365	\$36,500	
Expert Consultants			\$80,000	
Subtotal: \$226,000				
OTHER FEES				
[Person 1]				
[Person 2]				
Subtotal: \$				
COSTS				
[Item 1]				
[Item 2]				
Subtotal: \$				
TOTAL ESTIMATE: \$226,000				

Estimated Budget by Issues:

Issue #	Issue Name	% of Time	Budget
1	RAMP and Rate Case Plan Schedule and Process	10%	\$22,600
2	Improvements to Benefit-Cost Ratio Calculations	25%	\$56,500
3	Uniform Default Risk-Scaling Approach for BCR Calculations	25%	\$56,500
4	Improvements to Budget-Constrained Portfolio Optimization	25%	\$56,500
5	Risk Tolerance	15%	\$33,900
	Total	100%	\$226,000

Both the estimated total hours and budget by issue are preliminary and subject to adjustment based on the scoping of issues and the specific record development opportunities outlined in the yet-to-be-issued scoping ruling.

The reasonableness of the hourly rates requested for TURN's representatives will be addressed in our Request for Compensation.

The amount of any future request for compensation will depend upon the Commission's ultimate decision in this case, as well as the resources TURN devotes to the case going forward.

When entering items, type over bracketed text; add additional rows to table as necessary. Estimate may (but does not need to) include estimated Claim preparation time. Claim preparation time is typically compensated at ½ professional hourly rate.

PART III: SHOWING OF SIGNIFICANT FINANCIAL HARDSHIP
(To be completed by party intending to claim intervenor compensation;
see Instructions for options for providing this information)

A. The party claims that participation or intervention in this proceeding without an award of fees or costs imposes a significant financial hardship, on the following basis:	Applies (check)
1. The customer cannot afford, without undue hardship, to pay the costs of effective participation, including advocate's fees, expert witness fees, and other reasonable costs of participation. (§ 1802(h))	☐
2. In the case of a group or organization, the economic interest of the Individual members of the group or organization is small in comparison to the costs of effective participation in the proceeding. (§ 1802(h))	☒
3. The eligible local government entities' participation or intervention without an award of fees or costs imposes a significant financial hardship. (§ 1803.1(b).)	☐
4. A § 1802(h) or § 1803.1(b) finding of significant financial hardship in another proceeding, made within one year prior to the commencement of this proceeding, created a rebuttable presumption in this proceeding (§ 1804(b)(1)). Commission's finding of significant financial hardship made in proceeding number: Date of Administrative Law Judge's Ruling (or CPUC Decision) in which the finding of significant financial hardship was made:	☐

B. The party's explanation of the factual basis for its claim of "significant financial hardship" (§ 1802(h) or § 1803.1(b)) (necessary documentation, if warranted, is attached to the NOI:

TURN is making its annual showing on financial hardship and is seeking a finding of significant financial hardship in this proceeding. TURN has attached as Attachment 2 to this NOI an updated version of the narrative that has served to establish significant financial hardship in prior rulings addressing the organization's eligibility for intervenor compensation. TURN also addresses the timing of this request in Attachment 2.

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**PART IV: ATTACHMENTS DOCUMENTING SPECIFIC
ASSERTIONS MADE IN THIS NOTICE**

**(The party intending to claim intervenor compensation identifies and attaches documents;
add rows as necessary)**

Attachment No.	Description
1	Certificate of Service
2	Showing of TURN's Significant Financial Hardship

ADMINISTRATIVE LAW JUDGE RULING⁴
(Administrative Law Judge completes)

	Check all that apply
1. The Notice of Intent (NOI) is rejected for the following reasons:	☐
a. The NOI has not demonstrated the party's status as a "customer" or an "eligible local government entity" for the following reason(s):	☐
b. The NOI has not demonstrated that the NOI was timely filed (Part I(B)) for the following reason(s):	☐
c. The NOI has not adequately described the scope of anticipated participation (Part II, above) for the following reason(s):	☐
2. The NOI has demonstrated significant financial hardship for the reasons set forth in Part III of the NOI (above).	☐
3. The NOI has not demonstrated significant financial hardship for the following reason(s):	☐
4. The Administrative Law Judge provides the following additional guidance (see § 1804(b)(2)):	☐

IT IS RULED that:

1. The Notice of Intent is rejected.	☐
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⁴ A Ruling needs not be issued unless: (a) the NOI is deficient; (b) the Administrative Law Judge desires to address specific issues raised by the NOI (to point out similar positions, areas of potential duplication in showings, unrealistic expectations for compensation, or other matters that may affect the customer or eligible local government entity's Intervenor Compensation Claim); or (c) the NOI has included a claim of "significant financial hardship" that requires a finding under § 1802(h).

2. The customer or eligible local government entity has satisfied the eligibility requirements of Pub. Util. Code § 1804(a).	☐
3. The customer or eligible local government entity has shown significant financial hardship.	☐
4. The customer or eligible local government entity is preliminarily determined to be eligible for intervenor compensation in this proceeding. However, a finding of significant financial hardship in no way ensures compensation.	☐
5. Additional guidance is provided to the customer or eligible local government entity as set forth above.	☐

Dated _____, at San Francisco, California.

Administrative Law Judge

Attachment 1
Certificate of Service

(Filed electronically as a separate document pursuant to Rule 1.13(b)(iii))
(Served electronically as a separate document pursuant to Rule 1.10(c))

Attachment 2
Showing of TURN's Significant Financial Hardship

Attachment 2

Showing of TURN's Significant Financial Hardship

TURN is making its annual showing of significant financial hardship at this time. TURN last submitted its annual showing of significant financial hardship on June 6, 2025, with TURN's NOI filed in A.25-03-015. The Commission issued a ruling in that proceeding on July 8, 2026, finding that TURN had established significant financial hardship. Because the rebuttable presumption created by TURN's last finding of significant financial hardship in A.25-03-015 expired 8 days ago, TURN submits this annual showing now to avoid having a gap in time during which no rebuttal presumption will apply to new proceedings.

The definition of the term "significant financial hardship" is found in Section 1802(g) of the Public Utilities Code:

"Significant financial hardship" means either that the customer cannot without undue hardship afford to pay the costs of effective participation, including advocate's fees, expert witness fees, and other reasonable costs of participation, or that, in the case of a group or organization, the economic interest of the individual members of the group or organization is small in comparison to the costs of effective participation in the proceeding.

TURN represents an interest – the residential customer class – that would not otherwise be adequately represented in this proceeding. For decades, this Commission has consistently recognized that adequate representation requires not only the efforts of the Public Advocates Office but also the participation of interested parties. In D.85-06-028, issued in A.85-01-034, the Commission rejected the company's arguments that the Public Advocates Office (then known as the Public Staff Division) could fully occupy the field of residential ratepayer representation:

It is in the public interest that PacBell's application be fully investigated and aired through our hearing process. Given the breadth and complexity of the issues presented and the potential impact on residential customers, we can easily conclude that adequate representation requires the participation not only of our

Public Staff Division but also of other parties such as TURN. Participation by several parties helps to ensure that the record is fully developed and that many and varied proposals are presented on the issues. If we ever reach the point that there are a large number of experienced and highly-effective groups or individuals participating in addition to our Public Staff it could be harder to reach such a conclusion but for now the larger utilities have a much greater depth of resources to commit to the ratemaking arena than do any of the parties representing residential ratepayers, including our Public Staff. We conclude then, that adequate representation of the residential ratepayer under these circumstances requires participation of additional parties, specifically in this case the participation of TURN. (D.85-06-028 at 2-3)

The same considerations continue to apply. TURN continues to represent the overall interests of the residential ratepayer class, as well as the interests of its approximately 20,000 individual members. As this Commission has repeatedly recognized, the economic interests of these individual members are tiny in comparison to the costs of effective participation in CPUC proceedings:

It is obviously impractical for individual residential ratepayers to do much other than to send us letters or make brief statements at our public hearings, and while we appreciate such input it does not develop evidence of record upon which we can make findings of fact as required by law in connection with determining revenue requirement or rate changes. Realistically, then, there must be organized groups which participate on behalf of residential ratepayers on an ongoing basis with a reserve of experience and resources so that they can follow the continuing chain of ratemaking proceedings and participate effectively. We agree with TURN that it would simply not be “cost effective for individual residential ratepayers ... to mount these expenditures [TURN's estimated budget for participation] separately on their own behalf.” (D.85-06-028, p.3)

On a continuous basis since the Intervenor Compensation Program rules were adopted, this Commission has found that TURN, as an organization representing individual residential ratepayers, qualifies as a customer suffering significant financial hardship.¹ TURN continues to

¹ Rather than list all such decisions or rulings that include this finding, TURN cites a few of the earliest (D.86-02-039; D.87-04-032; and D.88-07-035) and the five most recent (the ruling of ALJs Fitch and Rizzo dated July 26, 2019 in R.19-01-011; the ruling of ALJ Gubman dated December 11, 2020 in R.20-08-021; the ruling of ALJ Nojan dated May 31, 2022 in A.21-12-007; the ruling of ALJ Watts-Zagha dated March 20, 2024 in A.23-06-008; and the ruling of ALJ Chang dated July 8, 2025 in A.25-03-015).

represent the same constituency, and the economic interests of those individual customers continue to be small in comparison to the costs of effective participation in CPUC proceedings.

Past Commission decisions have made it clear that, in the case of an organization such as TURN, the test for significant financial hardship looks to the economic interests of the individual members of the group in comparison with the costs of effective participation. Nonetheless, TURN has traditionally included in these filings a summary of the organization's financial position. While neither the statute nor the Commission's current Rules of Practice and Procedure specifically requires such a showing, TURN is supplying the information here for the Commission's information.

TURN is a tax-exempt non-profit corporation, organized under the laws of the State of California in January 1973. TURN relies primarily upon intervenor compensation awards from this Commission as its source of income, while also relying on membership contributions generated by its direct mail campaign and foundation grants. From time to time, TURN also derives income from contracts, other special fund-raising projects, and cy pres awards. No funds from any of these latter sources or foundation grants have been obtained to directly support TURN's participation in this proceeding.

TURN's total income for the fiscal year that ended June 30, 2025, was approximately \$8.97 million, a decrease of approximately 1% from the fiscal year ending June 30, 2024, which formed the basis for TURN's last showing of significant financial hardship presented in A.25-03-015. Compensation awards contributed about \$6.64 million toward that total, or approximately 74% of TURN's total income. TURN's expenses for the fiscal year totaled about \$7.75 million, leaving the organization with an operating surplus for the fiscal year of \$1.22 million and an end-of-fiscal-year fund balance of about \$8.82 million. Thus, the fund balance was equivalent to

slightly more than a one-year cash reserve. TURN's financial situation has varied over recent years due to the ebb and flow of intervenor compensation awards, which continues to present budgeting challenges to the organization.

Although other options are being pursued continually, TURN again expects to rely on individual donations, foundation grants, and intervenor compensation awards for the bulk of its operating income in fiscal years 2025-2026 (which just concluded) and 2026-2027. As always, the level of TURN's future income from these sources remains quite speculative. At the same time, operating expenses are likely to remain high because of the continuing heavy workload at the Commission.

As is obvious from the above information, intervenor compensation awards represent a significant and indeed critical portion of TURN's total budget. Absent eligibility for such awards, TURN's resources would be grossly inadequate compared to the costs of effective participation in CPUC proceedings, and TURN's primary mission to advocate before this Commission on behalf of consumers would be substantially impaired. Clearly TURN would suffer significant financial hardship if denied eligibility for compensation in the coming year.

TURN submits that the information provided above more than satisfies the requirements for the annual finding of "significant financial hardship." TURN therefore asks this Commission for a prompt determination of its eligibility for compensation in this proceeding.