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BEFORE THE PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA

Application of Liberty Utilities
(CalPeco Electric) LLC (U 933 E) For
Approval of Low-Income Assistance
Programs and Budgets for Program
Years 2028-2033.

Application 26-06-008
(Filed June 12, 2026)

In the Matter of the Application of
PacifiCorp (U 901-E) for Approval of
the California Alternate Rates for
Energy and Energy Savings Assistance
Programs and Budgets for Program
Years 2028 - 2033.

Application 26-06-009
(Filed June 12, 2026)

Application of WEST COAST GAS
COMPANY INC. (U910 G) for
Approval of Low-Income Assistance
Programs and Budgets for Program
Years 2028-2033.

Application 26-06-010
(Filed June 12, 2026)

Application of Bear Valley Electric
Service, Inc. (U 913 E) for Approval of
the 2028-2033 Energy Savings
Assistance and California Alternate
Rates for Energy Programs and
Budgets.

Application 26-06-011
(Filed June 12, 2026)

Application of Southwest Gas
Corporation (U 905 G) for Approval of
Energy Savings Assistance and
California Alternate Rates for Energy

Application 26-06-012
(Filed June 12, 2026)

Programs and Budgets for Program Years 2028-2033.

Application of Alpine Natural Gas Operating Company No. 1, LLC (U 909-G) for Approval of its Energy Savings Assistance and California Alternate Rates for Energy Programs and Budgets for Program Years 2028-2033.

Application 26-06-013
(Filed June 12, 2026)

ASSIGNED COMMISSIONER'S SCOPING MEMO AND RULING

This scoping memo and ruling sets forth the issues, need for hearing, schedule, category, and other matters necessary to scope this proceeding pursuant to Public Utilities Code Section 1701.1 and Article 7 of the Commission's Rules of Practice and Procedure (Rules).

1. Procedural Background

On June 12, 2026, the six Small and Multi-jurisdictional Utilities, Liberty Utilities (CalPeco Electric) LLC, PacifiCorp, West Coast Gas Company Inc., Bear Valley Electric Service, Inc., Southwest Gas Corporation, and Alpine Natural Gas Operating Company No. 1, LLC (collectively, the SMJUs or Applicants) filed respective applications requesting approval and funding for their low-income assistance programs and budgets for program years 2028-2033, which include the California Alternate Rates for Energy (CARE) and the Energy Savings Assistance (ESA) programs. On July 13, 2026, the assigned administrative law judge (ALJ) issued a ruling consolidating the applications, setting a prehearing conference (PHC) and requiring the parties to file a joint PHC statement. On July 20, 2026, the Public Advocates Office at the California Public Utilities Commission (Cal Advocates) filed a protest to the consolidated applications.

On August 17, 2026 the SMJUs filed a joint PHC statement that did not include the positions of Cal Advocates. On August 21, 2026, the SMJUs filed an amended joint PHC statement that included the positions of Cal Advocates.

The PHC was held on August 24, 2026 to address the issues of law and fact, determine the need for hearing, set the schedule for resolving the matter, and address other matters as necessary. After considering the applications, protest, amended joint PHC statement, and discussion at the PHC, I have determined the issues and initial schedule of the proceeding to be set forth in this scoping memo.

2. Issues

The issues to be determined or otherwise considered are:

1. Whether the proposed CARE and ESA program budgets, revenue requirements, and underlying assumptions are reasonable and should be established;
2. Whether the proposed CARE program goals are reasonable and should be established;
3. Whether the proposed CARE program designs (including, but not limited to, administration, eligibility, enrollment, recertification, verification, capitation fees, reporting, marketing, education, and outreach) are reasonable and should be established, including:
 - a. Whether modifications to eligibility-verification and recertification practices, including the percentage of participating customers required to verify, are reasonable;
 - b. Whether modifications to the proposed CARE program designs are reasonable to minimize attrition and barriers to participation for eligible customers; and
 - c. Whether modifications to the CARE program designs should be adopted to address unexpected changes in enrollment, including contingency plans for under- or over-enrollment;

4. Whether the proposed procurement and budget for the annual SMJU CARE Eligibility Study, including each utility's allocated share of study costs, is reasonable;
5. Whether the proposed ESA goals and targets are reasonable and should be established;
6. Whether the proposed ESA program designs (including, but not limited to, eligibility, application and enrollment practices, cost effectiveness, measure mix, program delivery, methods for evaluating program performance, marketing, outreach, reporting, and the workforce, education, and training efforts/ programs) are reasonable and should be established;
7. Whether modifications should be made to the proposed ESA program designs to appropriately balance maximizing bill savings and minimizing rate impacts on non-participants, while maintaining administratively simple and trackable program delivery, including:
 - a. Whether the Commission should modify ESA program designs to prioritize measures that deliver greater lifetime bill savings relative to costs, as well as important health and safety measures, including, where applicable, cooling measures in high heat areas; and
 - b. Whether the Commission should modify the framework for evaluating ESA program cost-effectiveness, including the metrics used and any associated targets or guidelines;
8. Whether there have been changes, including changes to West Coast Gas Company Inc.'s (West Coast Gas) residential housing stock since Decision (D).18-08-020 that merit reconsideration of West Coast Gas's exemption from participation in the ESA program;
9. Whether the SMJUs should be required to implement the Concurrent Application System (CAS) program created pursuant to Public Utilities Code 731 and D.23-05-006 in this cycle, and what is a reasonable plan for the

- SMJUs' implementation of the CAS, including, but not limited to, developing a timeline, process, and budget;
10. Whether the treatment of unspent or uncommitted funds is reasonable or should be modified or clarified;
 11. Whether the proposed continuation of the six-year program cycle, or alternatively a four-year cycle length, where applicable, is reasonable;
 12. Whether the proposals to authorize continued funding beyond program year 2033 at the final authorized program-year level are reasonable;
 13. Whether the estimated rate and bill impacts associated with the proposed CARE and ESA budgets are reasonable;
 14. Whether the proposed treatment of the CARE and ESA balancing accounts is reasonable; and
 15. Whether the CARE and ESA program budgets and design are consistent with Executive Order (EO) N-5-24, the Commission's Environmental and Social Justice Action Plan, and other relevant Commission and State affordability requirements.

Following the PHC, additional issues not discussed at the PHC – listed above as issues 3a-3c, and 7-9 – were identified for inclusion in the scope of this proceeding. Although these issues have been added, we do not view them as new. Rather, they are subsets of the issues already identified regarding whether the program designs are just and reasonable.

3. Need for Evidentiary Hearing

No party identified disputed issues of material fact in the amended joint PHC statement or during the PHC. However, in the amended joint PHC statement, Cal Advocates expressed a desire to reserve the right to request hearings, should material factual disputes arise during discovery or after review of testimony and rebuttal testimony. Accordingly, we will set a preliminary schedule including two days of evidentiary hearings and allow a date by which

parties must file a statement identifying whether hearings are needed. If hearings are not identified as necessary at that time, the evidentiary hearings will be cancelled.

4. Schedule

The following schedule is adopted here and may be modified by the ALJ as required to promote the efficient and fair resolution of the applications:

Event	Date
Supplemental Applicant Testimony	November 2, 2026
Intervenor Testimony	December 2, 2026
Rebuttal Testimony	December 18, 2026
Joint Party Statement re: Need for Hearings and Rule 13.9 Meet and Confer	January 15, 2027
<i>Remaining Schedule if Evidentiary Hearings are not Needed</i>	
Concurrent Opening Briefs Filed and Served	February 12, 2027
Concurrent Reply Briefs Filed and Served (Matter Submitted)	February 26, 2027
Proposed Decision	Expected Q2 2027
<i>Remaining Schedule if Evidentiary Hearings are Held</i>	
Evidentiary Hearings, if needed	February 9-10, 2027
Concurrent Opening briefs filed and served	March 5, 2027
Concurrent Reply briefs filed and served (matter submitted)	March 19, 2027
Proposed Decision	Expected Q2 2027

The above schedule includes a deadline by which the Applicants must serve supplemental testimony. By this deadline, Applicants shall serve supplemental testimony to address issues 3a-3c, and 7-9, as well as any needed supplemental testimony on other scoped issues not addressed in their original applications. We note that only West Coast Gas is required to submit supplemental testimony to address issue 8.

The January 15, 2027 joint party statement shall follow the meet and confer required by Rule 13.9 and shall include, to the extent applicable:

- i. Facts and issues that are uncontested and may be the subject of stipulation;
- ii. Facts and issues that are in dispute;
- iii. Whether the parties stipulate to the receipt of prepared testimony into evidence without direct or cross examination or other need to convene an evidentiary hearing;
- iv. Whether hearings are necessary, and if so, the evidence each party proposes to introduce at hearings, including the identification of anticipated exhibits, and the proposed schedule for the hearings, including estimates of time requested for cross-examination.
- v. The status of any settlement discussions.

The proceeding will stand submitted upon the filing of reply briefs unless the ALJ requires further evidence or argument. Based on this schedule, the proceeding will be resolved within 18 months as required by Public Utilities Code Section 1701.5.

5. Alternative Dispute Resolution (ADR) Program and Settlements

The Commission's Alternative Dispute Resolution (ADR) program offers mediation, early neutral evaluation, and facilitation services, and uses ALJs who have been trained as neutrals. At the parties' request, the assigned ALJ can refer this proceeding to the Commission's ADR Coordinator. Additional ADR information is available on the Commission's website.¹

Any settlement between parties, whether regarding all or some of the issues, shall comply with Article 12 of the Rules and shall be served in writing. Such settlements shall include a complete explanation of the settlement and a complete explanation of why it is reasonable in light of the whole record,

¹ <https://www.cpuc.ca.gov/PUC/adr/>

consistent with the law and in the public interest. The proposing parties bear the burden of proof as to whether the settlement should be adopted by the Commission.

6. Category of Proceeding and Ex Parte Restrictions

This ruling confirms the Commission's preliminary determination² that this is a ratesetting proceeding. Accordingly, ex parte communications are restricted and must be reported pursuant to Article 8 of the Rules.

7. Public Outreach

Pursuant to Public Utilities Code Section 1711(a), where feasible and appropriate, before determining the scope of the proceeding, the Commission sought the participation of those likely to be affected, including those likely to derive benefit from, and those potentially subject to, a decision in this proceeding. This matter was noticed on the Commission's daily calendar. Where feasible and appropriate, this matter was incorporated into engagements conducted by the Commission's External Affairs Division with local governments and other interested parties.

8. Intervenor Compensation

Pursuant to Public Utilities Code Section 1804(a)(1), a customer who intends to seek an award of compensation must file and serve a notice of intent to claim compensation by September 23, 2026, 30 days after the prehearing conference.

9. Response to Public Comments

Parties may, but are not required to, respond to written comments received from the public. Parties may do so by posting such response using the

² Resolution ALJ-176-3583 at 1-2.

“Add Public Comment” button on the “Public Comment” tab of the online docket card for the proceeding.

10. Public Advisor

Any person interested in participating in this proceeding who is unfamiliar with the Commission’s procedures or has questions about the electronic filing procedures is encouraged to obtain more information at <http://cpuc.ca.gov/pao> or contact the Commission’s Public Advisor at 866-849-8390 or send an e-mail to public.advisor@cpuc.ca.gov.

11. Filing, Service, and Service List

The official service list has been created and is on the Commission’s website. Parties should confirm that their information on the service list is correct and serve notice of any errors on the Commission’s Process office, the service list, and the ALJ. Persons may become a party pursuant to Rule 1.4.³

When serving any document, each party must ensure that it is using the current official service list on the Commission’s website.

This proceeding will follow the electronic service protocol set forth in Rule 1.10, with one exception, such that all parties are excused from the Rule 1.10 requirement to serve on the ALJ both an electronic and a paper copy of filed or serviced documents. Therefore, when serving documents on Commissioners, their personal advisors, and the ALJ, parties must only provide electronic service, unless otherwise instructed by the ALJ. All parties to this proceeding shall serve documents and pleadings using electronic mail, whenever possible, transmitted no later than 5:00 p.m., on the date scheduled for service to occur.

³ The form to request additions and changes to the Service list may be found at <https://www.cpsc.ca.gov/-/media/cpsc-website/divisions/administrative-law-judge-division/documents/additiontoservicelisttranscriptordercompliant.pdf>

Persons who are not parties but wish to receive electronic service of documents filed in the proceeding may contact the Process Office at process_office@cpuc.ca.gov to request addition to the “Information Only” category of the official service list pursuant to Rule 1.9(f).

The Commission encourages those who seek information-only status on the service list to consider the Commission’s subscription service as an alternative. The subscription service sends individual notifications to each subscriber of formal e-filings accepted by the Commission. Notices sent through subscription service are less likely to be flagged by spam or other filters. Notifications can be for a specific proceeding, a range of documents and daily or weekly digests.

12. Receiving Electronic Service from the Commission

Parties and other persons on the service list are advised that it is the responsibility of each person or entity on the service list for Commission proceedings to ensure their ability to receive emails from the Commission. Please add “@cpuc.ca.gov” to your email safe sender list and update your email screening practices, settings and filters to ensure receipt of emails from the Commission.

13. Assignment of Proceeding

Matthew Baker is the assigned commissioner and Shannon Clark is the assigned ALJ and presiding officer for the proceeding.

IT IS RULED that:

1. The scope of this proceeding is described above and is adopted.
2. The schedule of this proceeding is set forth above and is adopted.
3. No later than November 2, 2026, Liberty Utilities (CalPeco Electric) LLC, PacifiCorp, West Coast Gas Company Inc., Bear Valley Electric Service, Inc.,

Southwest Gas Corporation, and Alpine Natural Gas Operating Company No. 1, LLC shall serve supplemental testimony on issues not addressed in their original applications as set forth in this ruling.

4. Evidentiary hearings may be needed.
5. The presiding officer is Administrative Law Judge Shannon Clark.
6. The category of the proceeding is ratesetting.

Dated October 2, 2026, at San Francisco, California.

/s/ MATTHEW BAKER

Matthew Baker
Assigned Commissioner