CLEAN ENERGY ALLIANCE

AMENDED AGENDA

Board of Directors Regular & Special Meeting Agenda
March 26, 2026, 2:00 p.m.
Leucadia Wastewater District, Board Room
1960 La Costa Ave, Carlsbad, CA 92009

Members of the public can observe the livestream of the meeting via Zoom by clicking:

https://us06web.zoom.us/j/81376410530
or telephonically by dialing:
(253) 215-8782
Meeting ID: 813 7641 0530

Members of the public can provide public comment in writing or orally in person as follows:

Written Comments: If you are unable to participate in person and you wish to make a comment, you may submit written comments prior to and during the meeting via email to: clerk@thecleanenergyalliance.org. All written comments will be posted online and become part of the meeting record. To ensure announcement of receipt of your written comments during the meeting, please submit all written comments by 12:00 p.m. prior to the commencement of the meeting. Public comments received in writing will not be read aloud at the meeting.

Oral Comments: Members of the public can address the Board on items on the agenda at the time the item is being addressed or during Public Comments for topics that are not listed on the agenda. Speakers are limited to three (3) minutes each. In conformance with the Brown Act, no Board action can occur on items presented during Public Comment.

If you desire to speak during Public Comment, please fill out a speaker card and submit it to the Board Clerk. When you are called to speak, please come forward to the podium and state your name. To address the Board regarding an item on the agenda, please fill out a speaker card and submit it to the Board Clerk before the Board Chair announces the item.

CALL TO ORDER

ROLL CALL

FLAG SALUTE

APPROVAL OF AGENDA

BOARD COMMENTS & ANNOUNCEMENTS

PUBLIC COMMENT

APPROVAL OF MINUTES
Minutes of the Special Meeting held February 26, 2026

Presentations:

BESS Standards

Consent Calendar

Item 1: Clean Energy Alliance Treasurer's Report for January 2026

RECOMMENDATION:
Receive and file the Clean Energy Alliance Treasurer's Report for January 2026.

Item 2: Community Advisory Committee Meeting Schedule and Work Plan Amendment

RECOMMENDATION:
Adopt Resolution No. 2026-014 Approving the Amended 2026 Community Advisory Committee Meeting Schedule and Work Plan.

Item 3: Review and Update the 2026 Clean Energy Alliance (CEA) Legislative and Regulatory Policy Platform

RECOMMENDATION:
Adopt Resolution No. 2026-015 approving the revised 2026 Clean Energy Alliance Legislative and Regulatory Policy Platform

Item 4: Consider Adopting a Resolution Approving Agreements with All Legal Services Providers

RECOMMENDATION:
Adopt Resolution No. 2026-016 approving agreements with all CEA's legal services providers and authorizing the Chief Executive Officer to execute them, which consist of agreements to provide legal services through June 2027 with three (3) one-year options to renew in the CEO's discretion with the following firms: Burke, Williams and Sorensen, Hall Energy Law PC and Keyes & Fox LLP.

Reports

Item 5: Clean Energy Alliance Chief Executive Officer Operational and Administrative Report

RECOMMENDATION:
Receive and file the report.

Item 6: **Consider Adoption of Resolution No. 2026-017 Approving the Fiscal Year (FY) 2025/26 – 2030/31 Clean Energy Alliance Energy Programs Plan**

RECOMMENDATION:
Adopt Resolution No. 2026-017 approving the FY 2025/26 – 2030/31 Clean Energy Alliance Energy Programs Plan.

Public Hearings

Item 7: **Public Hearing to Consider Adoption of Resolution No. 2026-018 Expanding the Super Off-Peak Time-of-Use Period, Establishing a Medium Commercial Class and Large Commercial & Industrial Class and Rate Schedules**

RECOMMENDATION:
1) Conduct the Public Hearing: Open the Public Hearing, Receive Public Testimony, and Close the Public Hearing;
2) Adopt Resolution No. 2026-018 Expanding the Super Off-Peak Time-of-Use Period, Establishing a Medium Commercial Class and Large Commercial & Industrial Class and Rate Schedule for Clean Energy Alliance Effective April 1, 2026.

New Business

Item 8: **Regulatory Update**

RECOMMENDATION:
Receive the Regulatory update from Keyes and Fox.

Closed Session

Item 9: **CONFERENCE WITH LEGAL COUNSEL - INITIATION OF LITIGATION**

Whether to initiate litigation pursuant to Government Code section 54956.9(d)(4)
Number of Cases: 1

BOARD MEMBER REQUESTS FOR FUTURE AGENDA ITEMS

NEXT MEETING: Regular Board Meeting April 30, 2026, Leucadia Wastewater District, 1960 La Costa Ave., Carlsbad, CA 92009.

If you are an individual with a disability and need a reasonable modification or accommodation pursuant to the Americans with Disabilities Act (“ADA”), please contact clerk@thecleanenergyalliance.org prior to the meeting for assistance.

CLEAN ENERGY ALLIANCE

MINUTES

Board of Directors Special Meeting Agenda
February 26, 2026, 3:00 p.m.
Leucadia Wastewater District, Board Room
1960 La Costa Ave, Carlsbad, CA 92009

CALL TO ORDER: Chair Melendez called to order the Regular Meeting of the Clean Energy Alliance at 3:00 p.m.

ROLL CALL: Board Members: Bhat-Patel, Spelich, Figueroa, Nuñez, Becker, Melendez.
Vice Chair Garcia joined the meeting at 3:06 p.m.

FLAG SALUTE: Chair Melendez led the flag salute.

APPROVAL OF AGENDA: None.

BOARD COMMENTS & ANNOUNCEMENTS: None.

PUBLIC COMMENT: None.

APPROVAL OF MINUTES:
Minutes of the Regular Meeting held January 29, 2026
Minutes of the Special Meeting held January 29, 2026

Motion by Board Member Nuñez, seconded by Board Member Bhat-Patel, to approve the minutes presented. Motion carried, 6/0/1 (Garcia – Absent).

PRESENTATIONS:
State of Nuclear Industry

State of Geothermal Industry

Consent Calendar

Item 1: **Clean Energy Alliance Treasurer's Report for December 2025**

RECOMMENDATION:
Receive and file the Clean Energy Alliance Treasurer's Report for December 2025.

Item 2: **Consider Approval of Resolution No. 2026-012 Amending the Clean Energy Alliance Position Control Listing and Resolution No. 2026-013 Amending the Clean Energy Alliance Salary Schedule**

RECOMMENDATION:
1) Adopt Resolution No. 2026-012 Amending the Clean Energy Alliance (CEA) Position Control Listing
2) Adopt Resolution No. 2026-013 Amending the CEA Salary Schedule

Motion by Vice Chair Garcia seconded by Board Member Becker to approve Resolution No's 2026-012 and 2026-013. Motion carried, 7/0.

Board Member Becker left the meeting at 3:58 p.m.

Reports

Item 3: **Clean Energy Alliance Chief Executive Officer Operational and Administrative Report**

RECOMMENDATION:
Receive and file the report.

CEA Board received report.

Item 4: **Fiscal Year 2025/26 – 2026/27 Work Plan Review**

RECOMMENDATION:
That the Clean Energy Alliance Board receive a report of progress made on the Fiscal Years 2025/26 – 2026/27 CEA Work Plan and provide comment and feedback.

CEA Board received report.

New Business

Item 5: **Regulatory Update**

RECOMMENDATION:
Receive the Regulatory update from Keyes and Fox.

Keyes and Fox Partner Jacob Schlesinger provided the update via Zoom.

CEA Board received report.

BOARD MEMBER REQUESTS FOR FUTURE AGENDA ITEMS: None.

NEXT MEETING: Regular Board Meeting March 26, 2026, Leucadia Wastewater District, 1960 La Costa Ave, Carlsbad, CA 92009.

ADJOURN: Chair Melendez adjourned the meeting into closed session at 4:29 p.m.

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Ana Marie Alarcon
Clerk to the Board/Executive Assistant

Staff Report

DATE: March 26, 2026

TO: Clean Energy Alliance Board of Directors

FROM: Andy Stern, Interim Chief Financial Officer/Treasurer

ITEM 1: Clean Energy Alliance Treasurer's Report

RECOMMENDATION:

Receive and File Clean Energy Alliance (CEA) Interim Treasurer's Report for January 2026.

BACKGROUND AND DISCUSSION:

This report provides the Board with the following financial information through January 31, 2026:

- Statement of Financial Position (Unaudited and preliminary) – Reports assets, liabilities, and financial position of the CEA as of January 31, 2026.
- Statement of Revenues, Expenses and Changes in Net Position (Unaudited and preliminary) for the period ended January 31, 2026.
- Budget to Actuals Comparison Schedule (Unaudited and preliminary) – Reports actual revenues and expenditures compared to the annual amended budget as of January 31, 2026.
- List of Payments Issued – Reports payments issued for January 2026.

As of January 31, 2026, liabilities represent invoices and estimated accruals for energy and services received but not yet paid.

FISCAL IMPACT:

As of January 31, 2026, reported Unrestricted Net Position was $78,955,329.00

Submitted for Board consideration:

____

Gregory Wade
Chief Executive Officer

ATTACHMENTS:

A. Treasurer's Report for January 2026

CLEAN ENERGY ALLIANCE
STATEMENT OF NET POSITION
As of January 31, 2026

ASSETS	
Current assets	
Cash and cash equivalents	$ 68,989,916
Accounts receivable, net of allowance	33,423,786
Accrued revenue	15,979,223
Prepaid expenses	5,915,972
Deposits	265,938
Total current assets	124,651,681
Noncurrent assets	
Deposits	774,745
Total noncurrent assets	774,745
Total assets	125,426,426
LIABILITIES	
Current liabilities	
Accrued cost of electricity	37,354,658
Accounts payable	1,122,903
Deferred revenue	1,079,760
Other accrued liabilities	417,626
Security deposits - energy suppliers	297,750
Total current liabilities	40,272,697
Noncurrent liabilities	
Security deposits - energy suppliers	6,198,400
Total liabilities	46,471,097
NET POSITION	
Unrestricted	$ 78,955,329

These financial statements do not contain note disclosures, have not been subjected to an audit or review or compilation engagement, and no assurance is provided on them.

CLEAN ENERGY ALLIANCE
STATEMENT OF REVENUES, EXPENSES AND CHANGES IN NET POSITION
Seven Months Ended January 31, 2026

OPERATING REVENUES	
Electricity sales, net	$ 256,842,957
Miscellaneous income	2,993
Total operating revenues	256,845,950
OPERATING EXPENSES	
Cost of electricity	193,086,948
Contract services	4,120,051
Staff compensation	1,444,228
Other operating expenses	697,410
Total operating expenses	199,348,637
Operating income (loss)	57,497,313
NONOPERATING REVENUES (EXPENSES)	
Investment income	618,138
Interest expense	(539,233)
Nonoperating revenues (expenses), net	78,905
CHANGE IN NET POSITION	57,576,218
Net position at beginning of year	21,379,111
Net position at end of period	$ 78,955,329

These financial statements do not contain note disclosures, have not been subjected to an audit or review or compilation engagement, and no assurance is provided on them.

BUDGET TO ACTUALS COMPARISON SCHEDULE

At its June 2025 board meeting, the CEA Board approved the Fiscal Year (FY) 2025/26 budget approving $346,904,000 in total operating expenses. For the year-to-date, $199,888,000 of operating expenses have been expended. Revenues from electricity sales for the year-to-date reached $256,846,000. Nonoperating activity was a net expense of $79,000. The overall change in net position for the year-to-date was an increase of $57,576,000.

The Budget to Actuals Comparison Schedule is shown below.

CLEAN ENERGY ALLIANCE
BUDGETARY COMPARISON SCHEDULE
Seven Months Ended January 31, 2026

	Year-To-Date				Annual		
			Variance fav. (unfav.)				Budget Remaining /
	Actual	Budget	Amount	%	Annual Budget	Budget Less Actual YTD	Budget %
Electricity Sales, net	$ 256,845,950	$ 260,654,354	$ (3,808,404)	-1%	383,146,909	126,300,959	33%
Operating Expenses							
Cost of Energy	193,086,948	212,832,067	19,745,119	9%	333,540,321	140,453,373	42%
Other Operating Expenses	6,261,689	7,855,544	1,593,855	20%	13,363,246	7,101,557	53%
Total Operating Expenses	199,348,637	220,687,611	21,338,974	10%	346,903,567	147,554,930	43%
Operating Income (Loss)	57,497,313	39,966,743	17,530,570	44%	36,243,342	(21,253,971)	
Total Nonoperating Income/(Expense)	78,905	(258,989)	337,894	130%	(380,692)	(459,597)	121%
Change in Net Position	$ 57,576,218	$ 39,707,754	$ 17,868,464		$ 35,862,650	$ (21,713,568)	

These financial statements do not contain note disclosures, have not been subjected to an audit or review or compilation engagement, and no assurance is provided on them.

LIST OF PAYMENTS ISSUED

The report on the following page provides the details of payments issued by CEA for the month. All payments were within approved budget.

Date	Vendor	Memo/Description	Amount
01/02/2026	JPMorgan	Bank Fees for 10/1/25-1/1/26	124,270.83
01/02/2026	SAAVI ENERGY SOLUTIONS, LLC.	March 2026- Firm Resource Adequacy -	1,096,500.00
01/05/2026	Amy Williams	Expense Report 12/16/2025	184.47
01/05/2026	Amy Williams	Expense Report 12/17/2025	440.99
01/05/2026	CALPINE ENERGY SOLUTIONS	November 2025 Services	293,631.40
01/05/2026	FABICK, EMILY	Expense Report - Dec 2, 2025 to Dec 12, 2025	679.28
01/05/2026	HOWARD, ROB	Apr 28, 2025 to Aug 6, 2025 - Expense Reimbursement	1,477.41
01/05/2026	Neyenesch Printers	MOVE_ENG - 3,045 QTYMOVE_SPAN- 95 QTYTotal - 3,140	397.62
01/05/2026	PARTICIPATE ENERGY FUND LLC	Nov. 2025 PPA Period 11/4/25-12/3/25	1,302.46
01/05/2026	River City Bank CC	December 2025 CC Statement	1,950.48
01/05/2026	SDG&E	For services rendered under Schedule CCA for period November 2025	48,115.08
01/05/2026	THE ENERGY AUTHORITY	December 2025 - CAISO Weekly Statement of Activity (12/12/25-12/17/25) Total	34,570.66
01/05/2026	THE ENERGY AUTHORITY	December 2025 - CAISO Weekly Statement of Activity (12/12/25-12/17/25) Total	93,171.22
01/08/2026	USPS	First-Class Mail and First-Class Package Service	492.22
01/09/2026	EMPOWER (401a)	Employee Retirement -01/05/2026	11,015.62
01/09/2026	EMPOWER (457b)	Employee Retirement -01/05/2026	5,844.79
01/12/2026	THE ENERGY AUTHORITY	December 2025 - CAISO Weekly Statement of Activity (12/18/25-12/23/25) Total	107,448.09
01/13/2026	Alcaraz,Sophia	ER - Jan 7, 2026	41.05
01/13/2026	ATRIA WORKSPACE	February 2026 Rent	4,784.00
01/13/2026	Neyenesch Printers	50 Postage only - Move Notice Mailing 12/10 and 12/17 Stamps	37.50
01/13/2026	River City Bank CC	October/November 2025 CC Statement	3,816.00
01/13/2026	River City Bank CC	January 2026 CC Statement	4,420.91
01/13/2026	STERN, ANDREW	For the period from December 1, 2025 through December 31, 2025	13,000.00
01/13/2026	The Bayshore Consulting Group, Inc	December 2025 - CEA Consulting	5,687.50
01/15/2026	Evolution Affairs, LLC	Dec. 2025 - Professional Services	275.00
01/15/2026	Neyenesch Printers	1,258 Move Notice Mailing 12/23 and 12/30	351.27
01/15/2026	SDRMA	February 2026 Benefits Coverage	22,990.38
01/15/2026	State Compensation Insurance Fund	Monthly - Worker's Comp	1,060.44
01/20/2026	Ana Marie Alarcon	ER Jan 14, 2026	2,527.91
01/20/2026	CALPINE ENERGY SERVICES L.P.	DEC 2025 - CAP-CAISO	40,000.00
01/20/2026	EDF TRADING NORTH AMERICA	December 2025 - Capacity Purchase	588,750.00
01/20/2026	ES 1A Group 2 Opco, LLC	DEC 2025 - Resource Adequacy	108,360.00
01/20/2026	LEAPFROG POWER, INC.	January 2026 - CEA RA	17,176.00
01/20/2026	Orange County Pow er Authority	Dec. 2025 - System Flex	1,000,000.00
01/20/2026	Pow erex	January 2026 transactions - PCC1	61,687.50
01/20/2026	Resi Station LLC (Renew Home)	December 2025 - Proxy Demand Response CEA	1,800.00
01/20/2026	SDG&E	REC Sales - VA: Billing Period: Dec 01, 2025 to Dec 31, 2025	2,965,658.40
01/20/2026	SEMPRA	DEC 2025 - Capacity Purchases	912,500.00
01/20/2026	THE ENERGY AUTHORITY	December 2025 - CAISO Weekly Statement of Activity (12/24/25-1/1/26) Total	3,706.20
01/20/2026	THE ENERGY AUTHORITY	December 2025 - CAISO Weekly Statement of Activity (12/24/25-1/1/26) Total	250,857.20
01/20/2026	WESTERN POWER & STEAM II, LLC	March 2026 RA	592,000.00

01/20/2026	Willis Craft Works	Promotional Items	474.00
01/22/2026	Ana Marie Alarcon	ER Nov. 19, 2025	112.71
01/22/2026	Maher Accountancy	Accounting January 2026	13,000.00
01/22/2026	PaulosAnalysis	Nov. 2025 - Jan.2026 - Professional Service	1,500.00
01/22/2026	USPS	First-Class Mail and First-Class Package Service	861.91
01/23/2026	BRAUN BLAISING SMITH WYNNE	November . 2025 - General Matters	759.78
01/23/2026	DYNASTY POWER	December 2025 - Electrical Energy	844,210.50
01/23/2026	EMPOWER (401a)	Employee Retirement -01/20/2026	11,015.62
01/23/2026	EMPOWER (457b)	Employee Retirement -01/20/2026	6,273.96
01/23/2026	EMPOWER (FEES)	Expense Charges - 401(a) Plan Investment Management fees	847.92
01/23/2026	EMPOWER (FEES)	Expense Charges - 457(b) Plan Investment Management fees	1,131.59
01/23/2026	MORGAN STANLEY CAPITAL GROUP, INC.	Dec. 2025 - Energy	4,659,455.28
01/23/2026	NRG	NOV 2025 -	2,753,501.18
01/23/2026	SDG&E	For services rendered under Schedule CCA for period December 2025	61,396.58
01/23/2026	Shell Oil North America	NOV 2025 - Pow er	3,998,844.74
01/23/2026	Tecolote Wind LLC	December 2025 - Resource Adequacy Benefits	96,187.50
01/26/2026	BRENTECH INCORPORATED	VEEAM Microsoft 365 Backup Protection (monthly subscription)	13,500.00
01/26/2026	CalCCA	January-March 2026- FY 25-26 Operational Membership Dues Quarterly Payment	130,000.00
01/26/2026	Keyes & Fox LLP	December 2025- Professional Services	33,100.65
01/26/2026	New Gen Strategies & Solutions	December 2025 -Project: CEA SDG&E ERRA REGULATORY SUPPORT 2024-2026	8,193.75
01/26/2026	Pacific Energy Advisors, Inc	December 2025 - Technical Consulting Advisors & Channelside	40,170.00
01/26/2026	THE ENERGY AUTHORITY	January 2026 - CAISO Weekly Statement of Activity (1/2/26-1/7/26) Total	44,762.27
01/26/2026	THE ENERGY AUTHORITY	January 2026 - CAISO Weekly Statement of Activity (1/2/26-1/7/26) Total	186,399.21
01/26/2026	THE ENERGY AUTHORITY	December 2025 - Resource Management Monthly Fees	20,991.53
01/27/2026	Hall Energy Law PC	December 2025 - Fees for Professional Services	10,400.00
01/30/2026	CALIFORNIA DEPT TAX& FEE ADMIN	2025-Q4 Electric Energy Surcharge	178,674.00
Multiple	Multiple Customers	NEM Cash Out	17,205.99

CLEAN ENERGY ALLIANCE

Staff Report

DATE: March 26, 2026

TO: Clean Energy Alliance Board of Directors

FROM: Greg Wade, Chief Executive Officer

ITEM 2: Consider Resolution No. 2026-014 Approving the Amended 2026 Community Advisory Committee Meeting Schedule and Work Plan

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RECOMMENDATION:

That the Clean Energy Alliance Board of Directors (Board) Adopt Resolution No. 2026-014 approving the Amended 2026 Community Advisory Committee Meeting Schedule and Work Plan.

BACKGROUND AND DISCUSSION:

Pursuant to the Clean Energy Alliance (CEA) Community Advisory Committee (CAC) Policy, the CAC is comprised of two (2) appointees from each member agency for a total of 14 CAC members representing CEA's 7 member agencies. The CAC Work Plan and meeting schedule was adopted by the CEA Board at the January 29, 2026 meeting.

The 2026 CAC Meeting Schedule and Work Plan require amendment to accommodate scheduling conflicts affecting both CAC members and staff. Several CAC Members will be unavailable due to previously scheduled vacations and participation in the Energy Academy, requiring the March 12, 2026 meeting to be canceled and rescheduled to April 9, 2026. Additionally, staff will be attending the CalCCA Annual Conference during the week of May 14, 2026 meeting. To ensure adequate staff support and participation, the May 14, 2026 meeting will be rescheduled to June 11, 2026. These adjustments require an amendment to the 2026 Meeting Schedule and Work Plan to accurately reflect the revised meeting dates.

Below is the amended 2026 Meeting Schedule and Work Plan, which reflects updated meeting dates:

MEETING DATE	WORK PLAN/TOPICS
February 12, 2026 1 pm – 3 pm Leucadia Wastewater District Board Room	Chair/Vice Chair Election Board Organization Update/Work Plan Review Rate Relief Measures Programs Plan
April 9, 2026 1 pm – 3 pm Leucadia Wastewater District Board Room	Discussion of Ad-Hoc CAC Subcommittee Formation for 2026 Work Plan Items Energy Programs Plan Update
June 11, 2026 1 pm – 3 pm Leucadia Wastewater District Board Room	CEA Budget Update Hydrogen Vehicle Fueling Stations

July 9, 2026 1 pm – 3 pm Leucadia Wastewater District Board Room	Review CEA Draft FY 2026/27 Budget Programs Update New DER Technologies and integration
September 10, 2026 1 pm – 3 pm Leucadia Wastewater District Board Room	Update on outside organization collaboration Social Media Marketing Efforts & Website Updates Long Term Power Procurement Strategy Presentation 2027 Work Plan Suggestions
November 12, 2026 1 pm – 3 pm Leucadia Wastewater District Board Room	Ad Hoc Subcommittee Work for Board Presentation 2026 Achievements 2027 Work Plan Finalization

FISCAL IMPACT:

The cost to conduct CAC meetings is included in the adopted FY 2025/26 Budget. There are no new costs with this action.

Submitted for Board consideration:

Gregory Wade
Chief Executive Officer

ATTACHMENTS:

A. Resolution No. 2026-014

CLEAN ENERGY ALLIANCE
RESOLUTION NO. 2026-014

A RESOLUTION OF THE BOARD OF DIRECTORS OF CLEAN ENERGY ALLIANCE APPROVING THE AMENDED 2026 COMMUNITY ADVISORY COMMITTEE MEETING SCHEDULE AND WORKPLAN

WHEREAS, Clean Energy Alliance (CEA) is a joint powers agency, formed in November 2019, whose members include the cities of Carlsbad, Del Mar, Escondido, Oceanside, San Marcos, Solana Beach and Vista; and

WHEREAS, the CEA Community Advisory Committee (CAC) Policy states that the CEA Board shall determine the annual CAC meeting schedule and workplan; and

WHEREAS, special meetings of the CAC will be called as necessary and following the requirements of the Brown Act (Government Code §54954).

WHEREAS, the CEA Board wishes to amend the 2026 CAC Meeting Schedule and Workplan.

NOW, THEREFORE, BE IT RESOLVED, by the Board of Directors of Clean Energy Alliance, as follows:

Section 1. The Board of Directors of Clean Energy Alliance hereby establishes the following dates, times, and location, for regular CAC meetings during calendar year 2026:

Location: Leucadia Wastewater District, Board Room
1960 La Costa Ave,
Carlsbad, CA 92009

April 9, 2026	1 p.m.
June 11, 2026	1 p.m.
July 9, 2026	1 p.m.
September 10, 2026	1 p.m.
November 12, 2026	1 p.m.

Section 2. That the calendar year 2026 meeting calendar will be posted to the Clean Energy Alliance website.

Section 3. The Board of Directors of Clean Energy Alliance hereby establishes the following Workplan CAC meetings during calendar year 2026:

MEETING DATE	WORK PLAN/TOPICS
February 12, 2026 1 pm – 3 pm Leucadia Wastewater District Board Room	Chair/Vice Chair Election Board Organization Update/Work Plan Review Rate Relief Measures Programs Plan
April 9, 2026 1 pm – 3 pm Leucadia Wastewater District Board Room	Discussion of Ad-Hoc CAC Subcommittee Formation for 2026 Work Plan Items Energy Programs Plan Update
June 11, 2026 1 pm – 3 pm Leucadia Wastewater District Board Room	CEA Budget Update Hydrogen Vehicle Fueling Stations
July 9, 2026 1 pm – 3 pm Leucadia Wastewater District Board Room	Review CEA Draft FY 2026/27 Budget Programs Update New DER Technologies and integration
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November 12, 2026 1 pm – 3 pm Leucadia Wastewater District Board Room	Ad Hoc Subcommittee Work for Board Presentation 2026 Achievements 2027 Work Plan Finalization

Section 4. If the CAC chooses to establish any subcommittees, such subcommittees shall be established on an ad hoc basis to work on one or more of the above 2026 CAC Workplan items or other items as may be delegated by the Board to the CAC from time to time.

The foregoing Resolution was passed and adopted this 26th day of March, 2026, by the following vote:

AYES:
NOES:
ABSENT:
ABSTAIN:

APPROVED:

____
Katie Melendez, Board Chair

ATTEST:

____
Ana Marie Alarcon, Clerk to the Board

CLEAN ENERGY ALLIANCE

Staff Report

DATE: March 26, 2026

TO: Clean Energy Alliance Board of Directors

FROM: Greg Wade, Chief Executive Officer

ITEM 3: Review and Update the 2026 Clean Energy Alliance (CEA) Legislative and Regulatory Policy Platform

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RECOMMENDATION:

That the Clean Energy Alliance (CEA) Board of Directors (Board) adopt Resolution No. 2026-015 approving the revised 2026 CEA Legislative and Regulatory Policy Platform.

BACKGROUND AND DISCUSSION:

The CEA Legislative and Regulatory Policy Platform (Platform) states that the CEA Board shall review and update the Platform as appropriate each March. The Platform serves as a guide to the Board and staff in their advocacy efforts related to policy matters of interest at the state legislature and California Public Utilities Commission (CPUC). It allows both Board Members and staff to pursue actions at the legislative and regulatory levels in a consistent manner and with the understanding that they are pursuing actions in the best interest of CEA and its mission, member agencies and our customers. It provides guidance to the Chief Executive Officer to support or oppose positions that should be taken on legislative and regulatory matters that come before the California Community Choice Association (CalCCA) Board of Directors.

The adopted Platform was developed to be consistent with the CEA Joint Powers Authority (JPA) Agreement. Specifically, the JPA Agreement identifies the following purposes of CEA:

- Procuring/developing electrical energy for customers;
- Addressing climate change by reducing energy-related greenhouse gas emissions;
- Promoting electrical rate price stability and cost savings;
- Fostering consumer choice;
- Local economic development, such as job creation, local energy programs, and local power development.

Four basic principles were developed to ensure CEA's ability to achieve its purposes as stated above. The Platform is centered around these four principles:

1. Protecting CEA's local control for the purpose of preserving the ability to self-procure power resources, to self-determine rates and the energy programs offered to residents, businesses and the communities it serves, through the mechanisms of local governance.

2. Ensuring fair treatment of CEA customers by the California Public Utilities Commission (CPUC) and other state agencies.
3. Supporting recognition that electricity is an essential service and that CEA should have the ability to set electric rates that are affordable and competitive to the utilities.
4. Pursuing environmental initiatives that exceed minimum State mandates, reduce greenhouse gas emissions, promote the growth in renewable energy capacity at the local level, encourage clean energy adoption by CEA customers, and reduce fossil fuel dependency.

Considering CEA's purpose and the principles as detailed above, the Platform establishes the following positions:

- CEA will support legislation and regulatory actions which enable, protect and enhance the development and expansion of Community Choice Aggregation (CCA) programs, and that support CCA independence in procurement, program deployment, management and decision making.

- CEA will support legislation and regulatory actions which allow CEA to develop and procure local energy generation resources to meet the needs of its electric customers.

- CEA will support legislation and regulatory actions which promote a neutral, fair and competitive energy market.

- CEA will oppose legislation and regulatory actions that jeopardize CEA's independence to self-procure its power resources, determine its rates and the energy programs it provides to its customers in the present, or could restrict its independence to do so in the future.

CEA's priorities and goals remain largely consistent, so no major changes are recommended for the 2026 Legislative and Regulatory Policy Platform compared to 2025. Looking ahead, the primary focus areas will include affordability, resource transactability, energy-efficiency programs, energy storage, electrification initiatives, demand-response programs, and navigating an evolving regulatory and legislative landscape while advocating for policies that support CCA growth and flexibility.

FISCAL IMPACT:

There is no direct fiscal impact as a result of this action. The Board has previously supported hiring a lobbyist to assist CEA with legislative and regulatory matters. CEA is currently soliciting for these services.

Submitted for Board consideration:

____

Gregory Wade
Chief Executive Officer

ATTACHMENTS:

A. Resolution No. 2026-015, approving the 2026 Clean Energy Alliance (CEA) Legislative and Regulatory Policy Platform
B. 2026 CEA Legislative and Regulatory Policy Platform

CLEAN ENERGY ALLIANCE
RESOLUTION NO. 2026-015

A RESOLUTION OF CLEAN ENERGY ALLIANCE BOARD OF DIRECTORS APPROVING THE CLEAN ENERGY ALLIANCE LEGISLATIVE AND REGULATORY POLICY PLATFORM

WHEREAS, Clean Energy Alliance ("CEA") is a joint powers authority established on November 4, 2019, and organized under the Joint Exercise of Powers Act (Government Code Sections 6500 *et seq*.); and

WHEREAS, on September 17, 2020, the Board of Directors of the CEA ("Board") adopted the Legislative and Regulatory Policy Platform (Platform); and

WHEREAS, pursuant to the Platform, the Board shall review and update, as appropriately, the Platform on an annual basis; and

WHEREAS, The Platform serves as a guide to the Board and staff in their advocacy efforts related to policy matters of interest at the state legislature and California Public Utilities Commission (CPUC); and

NOW, THEREFORE, BE IT RESOLVED, by the Board of Directors of Clean Energy Alliance, as follows:

Section 1. The Board hereby approves the revised Legislative and Regulatory Policy Platform to read as indicated on Exhibit 1 (~~strikeouts~~ indicate deletions and underlines indicate additions), which are fully incorporated herein by this reference. The updated Policies shall be kept on file with the Board Clerk of CEA and available to the public for inspection on CEA's website.

The foregoing Resolution was passed and adopted on this 26th day of March 2026, by the following vote:

AYES:
NOES:
ABSENT:
ABSTAIN:

APPROVED:

____
Katie Melendez, Board Chair

ATTEST:

____
Ana Marie Alarcon, Clerk to the Board

~~2025~~ 2026 Legislative and Regulatory Policy Platform

Introduction

In 2024, the Clean Energy Alliance (CEA) Board of Directors adopted the Legislative and Regulatory Policy Platform to guide the CEA Board and staff in their advocacy efforts and engagement on policy matters of interest to CEA. The Platform was implemented to allow both Board Members and staff to pursue actions at the legislative and regulatory levels in a consistent manner and with the understanding that they are pursuing actions in the best interest of CEA and its mission, its member agencies and its customers. The Platform enables the organization to move swiftly to respond to legislative and regulatory events. The Platform also provides guidance to the Chief Executive Officer (CEO) on the support or oppose positions that should be taken on legislative and regulatory matters that come before the California Community Choice Association (CalCCA) Board of Directors.

As was adopted in the 2024 Policy Platform, unless otherwise approved by the Board, all CEA positions on individual bills will be presented to the Board for approval. For urgent legislative or regulatory matters where time is of the essence, the CEO, with Board Chair concurrence, will take a ~~position,~~position consistent with the Policy Platform and report the action to the full Board at the next Board meeting.

CEA's ~~2025~~ 2026 Legislative Priorities

In the ~~2025~~ 2026 legislative session, CEA will focus its advocacy efforts on affordability, decarbonization, Community Choice Aggregation (CCA) autonomy, CPUC data transparency, infrastructure—particularly battery energy storage facilities—and reducing emissions. However, this list is not exhaustive. CEA stakeholders are strongly encouraged to present any relevant items, including those outside the main focus areas for ~~2025~~2026, to CEA's Regulatory and Legislative Affairs department for research, analysis, and consideration.

Policy Principles

CEA supports legislation and regulatory actions that enable~~s~~, protect~~s~~, and enhance~~s~~ CEA's priorities and ability to serve its customers as determined by the CEA Board of Directors. The Legislative and Regulatory Policy Platform is centered around four basic principles:

1. Protecting CEA's local control for the purpose of preserving the ability to self-procure power resources, to self-determine rates, and to choose the energy programs offered to residents, businesses, and the communities it serves, through the mechanisms of local governance.
2. Ensuring fair treatment of CEA customers by the California Public Utilities Commission (CPUC) and other state agencies.
3. Supporting recognition that electricity is an essential service, and that CEA should have the ability to set electric rates that are affordable and competitive to the utilities.
4. Pursuing environmental initiatives that exceed minimum State mandates, reduce greenhouse gas emissions, ~~-~~promote the growth in renewable energy capacity at the local level, encourage clean energy adoption by CEA customers, and reduce fossil fuel dependency.

Policy Priorities

CEA aims to support its member cities and customers by offering cleaner energy, competitive rates, and local programs. CEA's commitment to advocating for policies that empower Community CCA programs, ensure fair competition, and maintain independence is outlined below:

1. Customer Program Development
   - CEA will support legislation and regulatory actions which enables, protects, and enhances the development and expansion of CCA programs, and that supports CCA independence in procurement, program deployment, management, and decision making to deliver the highest level of service to CEA customers.

2. Local Initiatives
   - CEA will support legislation and regulatory actions which allow CEA to develop and procure local energy generation resources to meet the needs of its electric customers.

3. Fair Market Competition
   - CEA will support legislation and regulatory actions which promote a neutral, fair, and competitive energy market.

4. Maintain CEA Autonomy
   - CEA will oppose legislation and regulatory actions that jeopardize CEA's independence to self- procure power resources, determine rates and the energy programs it provides to customers in the present, or could restrict its independence to do so in the future.

5. Advocate for Customer Affordability
   - CEA will support legislation that assists CEA's efforts to keep rates affordable for customers and will oppose legislation that would inequitably or unjustifiably inhibit CEA's efforts to keep rates affordable.

The Legislative and Regulatory Policy Platform is to be reviewed by CEA staff and submitted for board approval at the beginning of each legislative session year.

2026~~5~~ Legislative and Policy Platform
Adopted March 26~~7~~, 2026~~5~~

CLEAN ENERGY ALLIANCE

2026 Legislative and Regulatory Policy Platform

Introduction

In 2024, the Clean Energy Alliance (CEA) Board of Directors adopted the Legislative and Regulatory Policy Platform to guide the CEA Board and staff in their advocacy efforts and engagement on policy matters of interest to CEA. The Platform was implemented to allow both Board Members and staff to pursue actions at the legislative and regulatory levels in a consistent manner and with the understanding that they are pursuing actions in the best interest of CEA and its mission, its member agencies and its customers. The Platform enables the organization to move swiftly to respond to legislative and regulatory events. The Platform also provides guidance to the Chief Executive Officer (CEO) on the support or oppose positions that should be taken on legislative and regulatory matters that come before the California Community Choice Association (CalCCA) Board of Directors.

As was adopted in the 2024 Policy Platform, unless otherwise approved by the Board, all CEA positions on individual bills will be presented to the Board for approval. For urgent legislative or regulatory matters where time is of the essence, the CEO, with Board Chair concurrence, will take a position consistent with the Policy Platform and report the action to the full Board at the next Board meeting.

CEA's 2026 Legislative Priorities

In the 2026 legislative session, CEA will focus its advocacy efforts on affordability, decarbonization, Community Choice Aggregation (CCA) autonomy, CPUC data transparency, infrastructure—particularly battery energy storage facilities—and reducing emissions. However, this list is not exhaustive. CEA stakeholders are strongly encouraged to present any relevant items, including those outside the main focus areas for 2026, to CEA’s Regulatory and Legislative Affairs department for research, analysis, and consideration.

Policy Principles

CEA supports legislation and regulatory actions that enable, protect, and enhance CEA’s priorities and ability to serve its customers as determined by the CEA Board of Directors. The Legislative and Regulatory Policy Platform is centered around four basic principles:

1. Protecting CEA’s local control for the purpose of preserving the ability to self-procure power resources, to self-determine rates, and to choose the energy programs offered to residents, businesses, and the communities it serves, through the mechanisms of local governance.
2. Ensuring fair treatment of CEA customers by the California Public Utilities Commission (CPUC) and other state agencies.
3. Supporting recognition that electricity is an essential service, and that CEA should have the ability to set electric rates that are affordable and competitive to the utilities.
4. Pursuing environmental initiatives that exceed minimum State mandates, reduce greenhouse gas emissions, promote the growth in renewable energy capacity at the local level, encourage clean energy adoption by CEA customers, and reduce fossil fuel dependency.

Policy Priorities

CEA aims to support its member cities and customers by offering cleaner energy, competitive rates, and local programs. CEA's commitment to advocating for policies that empower Community CCA programs, ensure fair competition, and maintain independence is outlined below:

1. Customer Program Development
    - CEA will support legislation and regulatory actions which enables, protects, and enhances the development and expansion of CCA programs, and that supports CCA independence in procurement, program deployment, management, and decision making to deliver the highest level of service to CEA customers.

2. Local Initiatives
    - CEA will support legislation and regulatory actions which allow CEA to develop and procure local energy generation resources to meet the needs of its electric customers.

3. Fair Market Competition
    - CEA will support legislation and regulatory actions which promote a neutral, fair, and competitive energy market.

4. Maintain CEA Autonomy
    - CEA will oppose legislation and regulatory actions that jeopardize CEA's independence to self- procure power resources, determine rates and the energy programs it provides to customers in the present, or could restrict its independence to do so in the future.

5. Advocate for Customer Affordability
    - CEA will support legislation that assists CEA's efforts to keep rates affordable for customers and will oppose legislation that would inequitably or unjustifiably inhibit CEA's efforts to keep rates affordable.

The Legislative and Regulatory Policy Platform is to be reviewed by CEA staff and submitted for board approval at the beginning of each legislative session year.

CLEAN ENERGY ALLIANCE

Staff Report

DATE: March 26, 2026

TO: Clean Energy Alliance Board of Directors

FROM: Gregory Wade, Chief Executive Officer

ITEM 4: Consider Adoption of Resolution No. 2026-016 Approving Agreements with All Legal Services Providers

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RECOMMENDATION:

That the Clean Energy Alliance (CEA) Board of Directors (Board) adopt Resolution No. 2026-016 (Attachment A), approving agreements with all CEA's legal services providers and authorizing the Chief Executive Officer (CEO) to execute them, which consist of agreements to provide legal services through June 2027 with three (3) one-year options to renew in the CEO's discretion with the following firms:

1. **Amendment No. 2 with Burke, Williams & Sorensen, LLP (Burke)** to provide General Counsel services for an annual not to exceed amount of $135,000 beginning July 1, 2025 and adjusting rates effective July 1, 2026 (Attachment B);

2. **Amendment No. 6 with Hall Energy Law PC (Hall Energy)** to provide energy transactional counsel services for an annual not to exceed amount of $125,000 beginning July 1, 2025 and an updated hourly rate effective April 1, 2026 (Attachment C); and

3. **Amendment No. 2 with Keyes & Fox LLP (K&F)** to provide special transactional counsel services for a not to exceed amount of $100,000 for June 1, 2026 through June 30, 2027 (Attachment D); and

4. **An Amended and Restated Agreement with Keyes & Fox LLP (K&F)** to provide special regulatory and legislative counsel services (which includes legal services jointly provided to CEA and San Diego County Power (SDCP)) for a not to exceed amount of $413,000 for June 1, 2025 through May 31, 2026, update hourly rates, and a not to exceed amount of $450,000 for June 1, 2026 through June 30, 2027 (Attachment E).

BACKGROUND AND DISCUSSION:

In anticipation of the upcoming budget discussion, staff are bringing forward a review of all legal services agreements and a recommendation to extend those agreements with the same firms and align them through June 30, 2027 with three (3) one-year options to renew in the CEO's discretion within Board approved budget limitations.

General Counsel Services

Following a competitive Request for Qualifications (RFQ) process and interviews with the Board for General Counsel services, the Board selected Burke to serve as CEA's General Counsel on June 30, 2022. The original agreement with Burke contained a not to exceed amount of $120,000 for fiscal year 2023-2024 and a standard annual rate adjustment based on the Consumer Price Index (CPI) and as approved through the standard budget adoption process. On February 23, 2023, the Board approved Amendment No. 1, which extended the agreement with Burke for two years effective July 1, 2023.

Burke was founded in 1927, has over 190 attorneys and specializes in public entity administration and municipal law, land use and environmental law, and public sector labor and employment law. CEA has been and will continue to be supported by a team located in their San Diego office that includes:

- Johanna Canlas, Lead Attorney
- Elizabeth Mitchell, Assistant Lead Attorney
- Gena Burns, Public Sector and Employment Attorney

Burke is recommended as the firm that best meets the needs of CEA in the coming years for General Counsel services. The proposed Amendment No. 2 (Attachment B) to the agreement with Burke provides for a CPI adjustment of 4% (bringing the Lead Attorney/Partner rate to $398 per hour effective July 1, 2026) and an annual not to exceed amount of $135,000.

Energy Transactional Counsel Services

The Board approved the original agreement with Hall Energy at its regular meeting on April 16, 2020. Since that time, Hall Energy (and, specifically, Stephen Hall) has been meeting expectations in the provision of energy transactions attorney services. The Board has approved five (5) previous amendments to the agreement with Hall Energy. The most recent Amendment No. 5 approved on March 27, 2025, provided for an annual not to exceed amount of $125,000 per year.

Staff is recommending to continue using Hall Energy for energy transactions legal services and maintaining the not to exceed amount at $125,000 per fiscal year. Hall Energy has requested a rate adjustment to $675 for Mr. Hall effective April 1, 2026, to bring the rate to par with what is being charged to other CCAs. This proposed adjustment has been included in the draft Amendment No. 6 (Attachment C).

Special Regulatory, Legislative and Transactional Counsel Services

CEA utilizes outside legal counsel for regulatory and legislative matters and who also jointly represents CEA and SDCP for the various regulatory matters that were of joint concern. Addressing regulatory counsel in this manner has been and continues to be cost effective since CEA and SDCP have many positions on regulatory matters in common.

On April 12, 2023, CEA and SDCP issued a joint Request for Proposals for Regulatory Legal Services. Following interviews with staff from both organizations, both Boards selected K&F to provide those services. Prior to that, K&F had been providing special Regulatory Counsel services to CEA, representing CEA as part of the San Diego Gas & Electric (SDG&E) Annual Energy Revenue Recovery Applications (ERRA), ERRA Compliance applications and most recently SDG&E's General Rate Case. K&F have demonstrated professionalism and effectiveness in representing CEA in these and later proceedings.

The current agreement with K&F for joint legislative and regulatory services is dated June 30, 2023. Staff is recommending modifying the agreement with K&F so that it renews on the same schedule as the other legal services agreements. The proposed Amended and Restated Joint Representation Agreement with K&F would adjust the not to exceed amount for June 1, 2025 through May 31, 2026 by $50,000 (from $363,000 to $413,000), update hourly rates (Tim Lindl's 2026 rate is $525) and extend the agreement for June 1, 2026 through June 30, 2027 with a not to exceed amount of $450,000. Future extensions would track the fiscal year beginning July 1, 2027.

K&F also assists CEA in providing transactional legal services when Hall Energy has a conflict under a separate engagement letter dated March 6, 2025, which was amended effective November 1, 2025 to reflect a not to exceed amount of $200,000. Staff is also recommending modifying this agreement with K&F so that it renews on the same schedule as the other legal services agreements. The proposed Amendment No. 2 to the agreement with K&F would extend the agreement from June 1, 2026 to June 30, 2027 with not to exceed amount of $100k. Future extensions would track the fiscal year beginning July 1, 2027.

FISCAL IMPACT:

If all four legal services agreements are approved the following annual not to exceed amounts will be included in the Proposed Fiscal Year 2026/27 Budget:

Legal Services	**Firm**	**NTE Amount FY 26/27**
General Counsel	Burke, Williams & Sorensen, LLP	$135,000
Energy Transactional Counsel	Hall Energy Law APC	$125,000
Regulatory and Legislative Counsel	Keyes & Fox, LLP	$450,000
Transactional Counsel	Keyes & Fox, LLP	$100,000
Total Legal Services		$810,000

Submitted for Board consideration:

____
Gregory Wade
Chief Executive Officer

ATTACHMENTS

A. Resolution No. 2026-016
B. Proposed Amendment No. 2 to Agreement with Burke for General Counsel Services
C. Proposed Amendment No. 6 to Agreement with Hall Energy for energy transactional counsel services
D. Proposed Amendment No. 2 to Agreement with K&F for special transactional counsel services
E. Proposed Amended and Restated Agreement with K&F to provide special regulatory and legislative counsel services (including joint services to CEA and SDPD)

CLEAN ENERGY ALLIANCE
RESOLUTION NO. 2026-016

A RESOLUTION OF CLEAN ENERGY ALLIANCE BOARD OF DIRECTORS APPROVING AND AUTHORIZING THE CHIEF EXECUTIVE OFFICER TO EXECUTE THREE LEGAL SERVICES AGREEMENTS

WHEREAS, Clean Energy Alliance ("CEA") has the need for various types of legal services, including General Counsel services, energy transactional services and special regulatory and legislative attorney services; and

WHEREAS, at various times, CEA has conducted competitive procurements for these legal services; and

WHEREAS, Burke, Williams & Sorensen, LLP (Burke) currently provides General Counsel services to CEA; and

WHEREAS, Hall Energy Law PC (Hall Energy) currently provides energy transactional counsel services to CEA; and

WHEREAS, Keyes & Fox LLP (K&F) currently provides special regulatory, legislative and transactional counsel services to CEA under two separate agreements, which includes legal services jointly provided to CEA and San Diego County Power (SDCP); and

WHEREAS, in anticipation of the upcoming budget discussion, the CEA Board of Directors (Board) reviewed all its legal services agreements at its regular March 26, 2026.

NOW, THEREFORE, BE IT RESOLVED, by the Board of Directors of Clean Energy Alliance, as follows:

Section 1. The recitals above are true and correct and incorporated fully herein as findings.

Section 2. The Board hereby finds and determines that it is in the best interests of CEA and its customers to extend its legal services agreements with the same firms and align them through June 30, 2027 with three (3) one-year options to renew in the CEO's discretion in amounts within the budget approved by the Board.

Section 3. The Board hereby approves and authorizes the Chief Executive Officer (CEO) to execute the following legal services agreements with the following firms:

A. Amendment No. 2 with Burke, Williams & Sorensen, LLP to provide General Counsel services for an annual not to exceed amount of $135,000 beginning July 1, 2025 and adjusting rates by 4% effective July 1, 2026 in a form substantially similar to that presented to the Board on March 26, 2026;

B. Amendment No. 6 with Hall Energy Law PC to provide energy transactional counsel services for an annual not to exceed amount of $125,000 beginning July 1, 2025, and an updated hourly rate of $675 effective April 1, 2026, in a form substantially similar to that presented to the Board on March 26, 2026;

C. An Amended and Restated Engagement Letter and Joint Representation Agreement with Keyes & Fox LLP to provide special regulatory and legislative counsel services, including legal services jointly provided to CEA and San Diego County Power (SDCP), that:

    a. adjusts the not to exceed amount for June 1, 2025 through May 31, 2026 by $50,000 (from $363,000 to $413,000);
    b. extends the agreement for June 1, 2026 through June 30, 2027 with a not to exceed amount of $450,000;
    c. provides for three (3) one-year options to renew in the CEO's discretion in amounts within the budget approved by the Board; and
    d. is in a form negotiated and finalized by the CEO with approval from General Counsel; and

D. An Amendment No. 2 to the Agreement with Keyes & Fox LLP to provide special transactional counsel services that:

    a. extends the agreement from June 1, 2026 to June 30, 2027 with a not to exceed amount of $100,000;
    b. provides for three (3) one-year options to renew in the CEO's discretion in amounts within the budget approved by the Board; and
    c. is in a form negotiated and finalized by the CEO with approval from General Counsel.

The foregoing Resolution was passed and adopted this 26th day of March, 2026, by the following vote:

AYES:
NOES:
ABSENT:
ABSTAIN:

APPROVED:

____

Katie Melendez, Board Chair

ATTEST:

____

Ana Marie Alarcon, Clerk to the Board

Clean Energy Alliance
JOINT POWERS AUTHORITY

Amendment No. 2 to
Agreement Between the Clean Energy Alliance and
Burke, Williams & Sorensen, LLP for General Counsel Services
Effective July 1, 2025

Pursuant to the approval of the Clean Energy Alliance Board of Directors at its March 27, 2026 meeting, the Agreement between Clean Energy Alliance (CEA) and Burke, Williams & Sorensen, LLP (BWS) dated June 30, 2022, as previously amended, is further amended as follows:

Section 1. TERM is amended to reflect termination on June 30, 2027. CEA may, in its discretion, extend the term of the Agreement for up to three (3) additional one-year periods, not to extend beyond June 30, 2030. Any extension shall be exercised by written notice from CEA's Chief Executive Officer to BWS.

Section 3. Compensation to Consultant is amended to reflect total amount not to exceed $135,000 per fiscal year.

Exhibit B. Compensation is amended to reflect total amount not to exceed $135,000 per fiscal year.

Exhibit B. Compensation is further amended to reflect the following hourly rates effective July 1, 2026:

Staffing	**Hourly Rate**
Partners	$398
Senior Associates	$352
Associate Attorneys	$335
Paralegals	$205

All other provisions of the original Agreement dated June 30, 2022, as amended, shall remain in full force and effect.

CLEAN ENERGY ALLIANCE

____
Gregory Wade
Chief Executive Officer

____
Date

BURKE, WILLIAMS & SORENSEN, LLP

____
Eric Vail
Partner and Chair, Public Law Group

____
Date

Clean Energy Alliance
JOINT POWERS AUTHORITY

Amendment No. 6 to
Agreement Between the Clean Energy Alliance and
Hall Energy Law PC for Legal Services in Connection with Energy Procurement
Effective July 1, 2025

The Agreement between Clean Energy Alliance (CEA) and Hall Energy Law PC dated April 24, 2020, as previously amended, is amended as follows:

Term. The Agreement is amended so that it now expires on June 30, 2026. CEA may, in its discretion, extend the term of the Agreement for up to three (3) additional one-year periods, not to extend beyond June 30, 2029. Any extension shall be exercised by written notice from CEA's Chief Executive Officer to Hall Energy Law PC.

Section 2. Fees and Hourly Rates is amended to reflect a total not to exceed amount per one-year term of $125,000, including for the current fiscal year 2025-2026.

Section 2. Fees and Hourly Rates is further amended to reflect a new hourly rate of $675 for Stephen Hall effective as of April 1, 2026.

Except as modified above, all other provisions of the original Agreement dated April 24, 2020, as amended, shall remain in full force and effect.

CLEAN ENERGY ALLIANCE

____
Gregory Wade
Chief Executive Officer

Date: ____________________

HALL ENERGY LAW PC

____
Stephen Hall
Principal

Date: ____________________

APPROVED AS TO FORM

____
Johanna Canlas
General Counsel

AMENDMENT NO. 2 TO AGREEMENT WITH KEYES & FOX LLP

WHEREAS, the CLEAN ENERGY ALLIANCE, an independent public agency ("Authority"), and KEYES & FOX LLP entered into that certain agreement entitled ENGAGEMENT LETTER BETWEEN KEYES & FOX LLP AND CLEAN ENERGY ALLIANCE, effective on September 1, 2024, hereinafter referred to as "Original Agreement"; and

WHEREAS, the Original Agreement includes an option to renew the Original Agreement upon mutual written consent through May of 2028; and

WHEREAS, the Original Agreement states, as follows: "If the option to extend is elected, budgets for any extension will be determined at that time"; and

WHEREAS, Authority and KEYES & FOX entered into that certain FIRST AMENDMENT TO AGREEMENT WITH KEYES & FOX effective November 1, 2025 ("First Amendment"), which amended the Original Agreement; and

WHEREAS, Authority and KEYES & FOX have determined it is in their mutual interest to further amend the Original Agreement, as amended by the First Amendment (collectively, the "Agreement").

NOW, THEREFORE, FOR VALUABLE CONSIDERATION, THE PARTIES AGREE AS FOLLOWS:

1. The Agreement is hereby extended through June 30, 2027.

2. Unless otherwise agreed to in writing, Authority will not be obligated for fees in excess of one hundred thousand dollars ($100,000) between June 1, 2026 and June 30, 2027.

3. The Agreement's renewal provisions are amended to provide for three (3) one-year mutual renewal options, commencing July 1, 2027, which may be exercised on the Authority's behalf, unless otherwise provided in writing, by its Chief Executive Officer in amounts within the budget approved by the Board for the applicable fiscal year and agreed to by KEYES & FOX.

4. This Amendment shall be effective on June 1, 2026.

5. Except as expressly modified herein, all of the provisions of the Agreement shall remain in full force and effect. In the case of any inconsistencies between the Agreement and this Amendment No. 2, the terms of this Amendment No. 2 shall control.

6. This Amendment No. 2 may be executed in counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument.

IN WITNESS WHEREOF, the parties have caused this Amendment No. 2 to be executed as of the dates set forth besides their signatures below.

CONSULTANT NAME KEYES & FOX LLP	CLEAN ENERGY ALLIANCE A Joint Powers Authority
By: ___________________________	By: ____________________________
Name: Tim Lindl	Name: Greg Wade
Title: Partner	Title: Chief Executive Officer
Date: ___________________________	Date: ___________________________

KEYES&FOX LLP

580 N. California St.
12th Floor
San Francisco, CA 94104
www.keyesfox.com

April 1, 2026

Greg Wade
Chief Executive Officer
Clean Energy Alliance
5857 Owens Ave, Suite 2023
Carlsbad, CA 92008

RE: Amended and Restated Engagement Letter and Joint Representation Agreement Between Keyes & Fox LLP and Clean Energy Alliance ("A&R Agreement")

Keyes & Fox LLP ("K&F") is delighted that Clean Enegy Alliance ("CEA") has decided to engage K&F to act as general regulatory counsel to provide legal representation both individually and jointly with other community choice aggregators ("CCAs") before the California Public Utilities Commission ("Commission") and other regulatory agencies, as well as in legislative and compliance-related issues, and any other matters K&F and CEA both mutually agree to undertake ("Legal Services").

This A&R Agreement amends and restates that specific "Engagement Letter and Joint Representation Agreement Between Keyes & Fox LLP and Clean Energy Collective [*sic*]" dated June 18, 2023 ("Original Agreement") to:

- Update the contact information for both K&F and CEA;
- Add legislative support to the stated scope of the Original Agreement;
- Increase the not-to-exceed amount ("NTE") in the Original Agreement by fifty thousand dollars ($50,000) from three hundred sixty-three thousand dollars ($363,000) to four hundred thirteen ($413,000) for the period June 1, 2025 – May 31, 2026;
- Renew and extend the original agreement for the period June 1, 2026 to June 30, 2027, with an NTE of four hundred fifty thousand dollars ($450,000);
- Provide three (3) one-year mutual renewal options, commencing July 1, 2027, which may be exercised on CEA's behalf, unless otherwise provided in writing, by its Chief Executive Officer in amounts within the budget approved by CEA's Board for the applicable fiscal year and agreed to by K&F ("Mutual Renewal Options");
- Establish an NTE of four hundred fifty thousand dollars ($450,000) per year for each Mutual Renewal Option, unless K&F and CEA agree to a different NTE in writing; and

- Update K&F's rates under the A&R Agreement to K&F's 2026 rates.

This letter describes the basis of the attorney-client relationship between K&F and CEA with respect to the Legal Services, and an explanation of how K&F will bill for those services. This letter also describes the risks to and responsibilities of CEA for matters where CEA will be jointly represented along with other CCAs ("Joint Representation").

1. Scope of Engagement

Pursuant to this Engagement Letter, K&F shall provide CEA with the Legal Services identified above. K&F will do its utmost to represent CEA effectively, provide Legal Services in an efficient manner, and respond promptly to CEA's inquiries.

We have run a conflicts check as it relates to the proposed Legal Services, and we have not found any direct conflicts with undertaking them. If a conflict arises that may impact our ability to provide CEA with effective representation, we will promptly bring that conflict to CEA's attention. If CEA becomes concerned about any relationship we might have with particular companies, organizations or individuals, please bring those concerns to our attention.

K&F will coordinate projects with Greg Wade, as the designated representative of CEA, or with whomever Mr. Wade may specifically delegate that authority. We understand that Mr. Wade has the authority to make decisions on behalf of CEA in connection with the Legal Services proposed, and we are relying on that understanding.

2. Joint Representation

When asked to undertake Joint Representations of multiple CCAs ("Joint Clients") K&F will represent each of the Joint Clients with respect to the Legal Services, and all appearances and filings made in connection with the Legal Services shall be made in the name of all Joint Clients. By executing this letter, CEA agrees that for Joint Representation matters, K&F will take direction from each Joint Client. In addition, CEA agrees that if any Joint Clients in a Joint Representation requests in writing – for any reason or for no reason – to withdraw from Joint Representation, that withdrawal would be effective immediately, and from that point forward, K&F would not have an attorney-client relationship or further attorney-client obligations with the withdrawn party with respect to the Legal Services.

Because K&F will be representing multiple clients in certain matters under this engagement, the applicable rules of professional conduct require that we inform you, as a Joint Client, of actual and potential conflicts of interest with respect to Joint Representation, and that we obtain informed, written consent from each of the Joint Clients agreeing to the Joint Representation.

K&F has run a conflict check as it relates to the Legal Services. Based on the information we have been provided, we do not believe representation of Joint Clients with respect to the Legal Services involves an actual conflict of interest between the Joint Clients. If CEA is aware of an actual conflict of interest as between and Joint Clients, please let K&F know immediately.

Even though there may be no actual conflict, there are potential conflicts. K&F currently represents numerous CCAs and other organizations and companies in California's energy industry in matters that may pertain to the Legal Services. K&F may be required to refrain from providing Legal Services on a particular matter if it has an existing conflict or potential conflict due to an existing engagement with another client. K&F will seek to obtain conflict waivers from CEA and other K&F clients whenever possible.

Differences in respective financial resources, prior experience, interests, and objectives of any Joint Clients could make one approach to K&F's representation more favorable to one Joint Client than to another, or could lead to disputes among Joint Clients. For example, if K&F was to represent only one client, rather than multiple Joint Clients, K&F might be able to obtain more favorable treatment for that one. Because K&F will be representing multiple Joint Clients, it will be necessary to balance the interests of any Joint Clients rather than prioritizing the interests of only one client.

If a potential conflict arises, either among any Joint Clients or between CEA and other K&F clients that may impact our ability to fully represent CEA with respect to the Legal Services, we will promptly bring that conflict to CEA's attention.

In the event any Joint Clients become adverse to each other with respect to the Legal Services, CEA agrees that they shall not seek disqualification of K&F from representation of the other Joint Clients with respect to the Legal Services on the basis of this agreement, K&F's access to confidential information obtained from CEA in connection with the Legal Services, or K&F's separate representation of any Joint Clients on matters unrelated to the Legal Services; provided, however, that nothing in this agreement authorizes K&F to represent either of the Joint Clients in any action brought by or against either of the other Joint Clients.

3. Confidentiality of Communications and Work Product.

Generally, it is in CEA's interest to preserve confidentiality of all communications with K&F. If CEA discloses any of our communications, it jeopardizes the privileged nature of the communications, so we believe it is advisable that CEA take care not to disclose privileged information to third parties.

For Joint Representations, CEA understands and acknowledges that any communications between each of the Joint Clients and K&F regarding the Legal Services may not be kept confidential from the other Joint Clients. In addition, should any future dispute among Joint Clients concerning the matter on which Joint Clients have engaged us to represent them lead to litigation, the attorney-client privilege may not protect communications that were commonly shared.

If CEA wishes to communicate confidentially with K&F about matters outside the scope of any Joint Representation, it should: 1) exclude all third parties from the communication, including the other members of the Joint Clients, and 2) ensure K&F is aware the correspondence is on behalf of the individual agency, company or organization and is not related to the Legal Services subject to a Joint Representation.

Through this Engagement Letter, CEA authorizes K&F to engage in confidential communications with EQ Research LLC to obtain litigation support with respect to the Legal Services. K&F understands it is the intent of CEA that all communications and work product that are developed by, or shared with, EQ Research LLC related to the Legal Services shall be confidential and subject to attorney-client privilege and/or attorney work product privilege.

4. Fees, Costs, and Invoicing

By signing this Joint Representation Agreement, CEA agrees to pay K&F for time and out-of-pocket expenses according to the terms set forth below.

a. Professional Fees

K&F will keep an hourly total of time spent on the Legal Services matters. Work will be performed at hourly rates according to the rates set forth in Attachment A to this Engagement Letter, which is incorporated by reference herein. It is K&F's policy to adjust hourly rates for all attorneys and staff at the beginning of the calendar year. Historically, rate increases have been between 5-8% per year. Rates quoted in Attachment A are 2026 rates. Our firm's practice is to charge for travel time, as discussed in Attachment A.

Tim Lindl and Jake Schlesinger will be the lead K&F attorneys providing the Legal Services to CEA. Mr. Lindl and Mr. Schlesinger may utilize services of other K&F attorneys and support staff in connection with this matter. By executing this Engagement Letter, you consent to Mr. Lindl and Mr. Schlesinger serving as lead attorneys in providing Legal Services and to their assignment, as necessary, of work on this matter to the attorneys, support staff or EQ employees listed in Attachment A.

Unless otherwise agreed to in writing, CEA will not be obligated for fees in excess of the following amounts:

June 1, 2023 – May 31, 2024: $300,000

June 1, 2024 – May 31, 2025: $330,000

June 1, 2025 – May 31, 2026: $413,000

June 1, 2026 – June 30, 2026: $450,000

Upon mutual consent, K&F and CEA may exercise the Mutual Renewal Options. The Mutual Renewal Options may be exercised on CEA's behalf, unless otherwise provided in writing, by its Chief Executive Officer in amounts within the budget approved by CEA's Board for the applicable fiscal year.

If a Mutual Renewal Option is elected, the NTE for that period will be four hundred fifty thousand dollars ($450,000) per year, unless K&F and CEA agree to a different NTE in writing. Such agreement to establish a different NTE for any of the three extension periods may occur via electronic mail.

b. Expenses

Expenses may be incurred in performing the Legal Services. K&F will bill for all costs, disbursements, and expenses in addition to our hourly fees. Costs and expenses include costs for travel including mileage and parking, and similar expenses. Expenses shall be billed at actual cost.

c. Invoices and payments

K&F will invoice CEA on or around the 10th of each month for Legal Services provided during the prior calendar month. Fees for Legal Services will be earned as of the time of invoicing. Invoices shall list the matter worked on and provide information on the dates of service, time involved, attorney responsible, and activity undertaken. CEA shall be responsible for payment of the total amount of its invoice. Invoices are due and payable within thirty (30) calendar days. Any unpaid amounts after thirty days will accrue interest at a rate of nine percent (9%) per annum.

For Joint Representation matters where K&F represents multiple Joint Clients, K&F will split the invoice among the Joint Clients evenly, unless otherwise agreed to in writing.

5. Termination of K&F's Representation

Either K&F or CEA may terminate K&F's representation of CEA at any time and for any reason. At the time K&F's representation of CEA concludes, all unpaid fees and costs for K&F's Legal Services become due and payable. If at that time CEA does not request the return of files related to the Legal Services, K&F will retain such files for a period of three years, after which K&F may have the files destroyed.

6. Miscellaneous

This letter is the entire agreement between CEA and K&F concerning the provision of regulatory, policy and compliance Legal Services. It supersedes and replaces in its entirety all prior Engagement Letters between CEA and K&F with regard to such matters *including* the Original Agreement.

This Engagement Letter and the scope of Legal Services provided under it may be amended from time to time by mutual agreement. California law will govern this agreement and any subsequent amendments.

7. Conclusion

If the terms of K&F's representation as explained in this Engagement Letter are satisfactory, please execute a copy of this letter as indicated and return it to me. Please feel free to contact me if you have any questions.

We look forward to our representation of CEA.

Sincerely,

Tim Lindl, Partner
Keyes & Fox LLP

Jacob Schlesinger, Partner
Keyes & Fox LLP

CEA hereby authorizes K&F to represent its interests with respect to the Legal Services. CEA acknowledges, by signing this letter, that it has had the opportunity to consult with other counsel about the consequences of this engagement and that K&F recommends that you do so. By signing this letter, the signatory affirms that he or she understands and agrees to bind his or her company to the terms set forth in this Engagement Letter. This Engagement Letter shall not take effect, and K&F shall have no obligation to provide the Legal Service described herein, until CEA has returned a signed copy of this letter.

CEA

I have read the foregoing Engagement Letter, understand it and agree to it on behalf of CEA.

By:______________________

Greg Wade

Title: Chief Executive Officer

Date: ____________________

<u>Attachment A</u>: Keyes & Fox LLP 2026 Hourly Rate Sheet

<u>Attorneys</u>

Jason Keyes	$450
Tim Lindl	$525
Jake Schlesinger	$490
Scott Dunbar	$440
Sheridan Pauker	$520
Nikhil Vijaykar	$460
Julia Kantor	$450
Theresa Cho	$645
Ann Springgate	$420
Alexandra Haggarty	$430
Alissa Greenwald	$340
Gonzalo Rodriguez	$400
Yonatan Moskowitz	$400
Nathan Carrier	$350

<u>EQ Research, LLC Analysts and Experts (Non-Keyes & Fox LLP Personnel)</u>

Miriam Makhyoun	$270
Justin Barnes	$250
Jason Hoyle	$200
Alicia Zaloga	$170
Riana Ackley	$160
Heather DePouw	$160
Seth Brown	$150
Nikhil Tyagi	$150
Corey Cochran	$130
Rob Campbell	$130
Eleanor Tyson	$130

Travel Policy: Unless special arrangements are made, travel time is billed at the full hourly rate. Every effort will made to work productively on the Joint Clients matters during travel. If work is performed for another client during travel, the Joint Clients will not be billed for that time. All reasonable travel expenses are billable – hotel, airfare, car rental, meals, taxi, public transit, etc.

Work Policy: Reasonable time for filing and service is billed at regular billable rates.

Miscellaneous Expenses Policy: Expenses for postage, photocopying, printing, faxing and other minor expenses directly related to a matter are billable at cost to the Joint Clients.

CLEAN ENERGY ALLIANCE

Staff Report

DATE: March 26, 2026

TO: Clean Energy Alliance Board of Directors

FROM: Greg Wade, Chief Executive Officer

ITEM 5: Clean Energy Alliance Chief Executive Officer Operational and Administrative Report

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RECOMMENDATION:

Receive and File the Chief Executive Officer (CEO) Operational and Administrative Report.

BACKGROUND AND DISCUSSION:

This report provides an update to the Clean Energy Alliance (CEA) Board regarding operational and administrative activity.

OPERATIONAL UPDATE

CalCCA Diablo Canyon Power Plant Tour

CalCCA organized a tour of the Diablo Canyon Power Plant (DCPP) nuclear power facility in Avila Beach on March 6 for various CCA Staff. The interactive tour provided a detailed look at nuclear energy, safety, and environmental programs of the Pacific Gas & Electric (PG&E) run facility. DCPP is the single largest power station in California, providing approximately 9% of the State's total electricity supply and 17% of the State's zero-carbon electricity.

DCPP was scheduled to discontinue its operations in 2025 due to high operating costs and poor economic viability compared to renewable energy sources. However, after a series of statewide energy shortfalls, increasing energy demand, and high energy costs, Governor Gavin Newsom signed legislation in September 2022, seeking to extend operations into 2030 to help ensure electricity reliability and continue to provide carbon-free energy. The Nuclear Regulatory Commission has stated that DCPP is safe and environmentally sound to operate for another 20 years.

Recruitment Update

CEA has completed initial interviews for the five (5) new full-time positions of Account Services and Data Specialist/Analyst, Energy Contracts and Compliance Specialist/Analyst, Programs Specialist/Analyst, Regulatory and Legislative Affairs Analyst, and Senior Financial Analyst/Finance Manager. Final interviews for all positions began the week of March 11th and offers have been made for five of the positions.

CEA in the Community

To provide opportunities for the customers and communities we serve to meet with CEA staff and have their questions answered, staff continues to attend many in-person community events, organize and hold community workshops and give presentations. CEA has been busy with many of these scheduled outreach efforts. Recent events and presentations that CEA participated in:

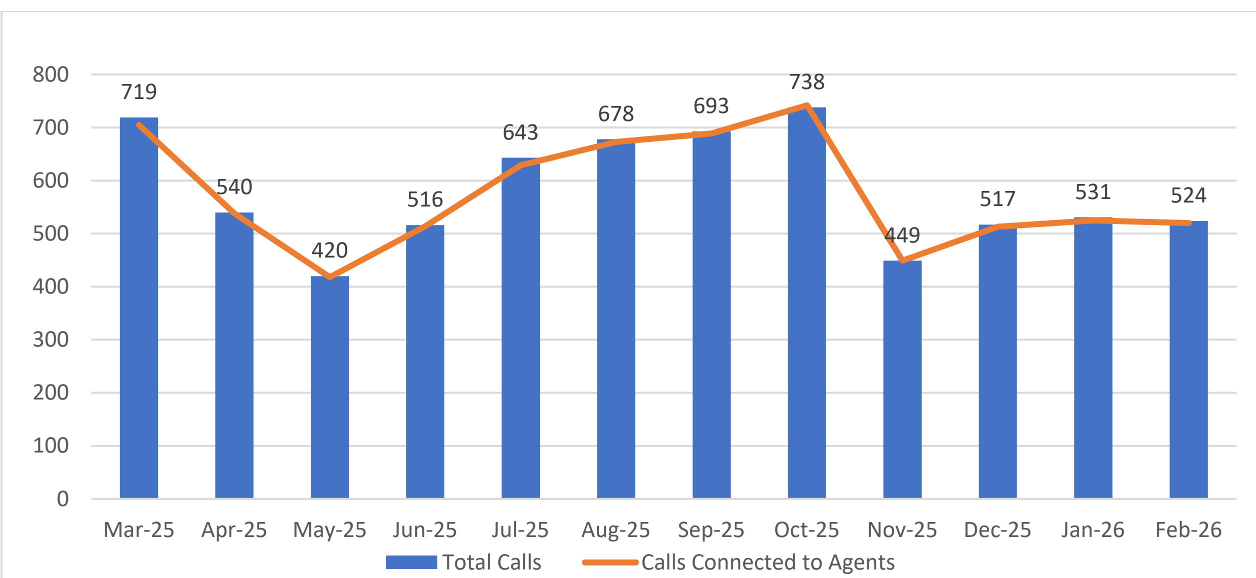
DATE	DESCRIPTION	CITY
March 9, 2026	CA League of Cities Presentation	San Diego
March 10, 2026	Chamber of Commerce Green Business Committee	Carlsbad
March 10, 2026	San Diego North Economic Development Chamber	San Marcos
March 21, 2026	North County Climate Change Alliance Presentation	Carlsbad
March 25, 2026	Vista Unified STEM 2 Career Expo	Vista

Upcoming events in which CEA will be participating include:

DATE	DESCRIPTION	CITY
March 26, 2026	Meet the City	Oceanside
March 27, 2026	CEA Sponsorship Night at Frontwave Arena	Oceanside
April 4, 2026	Earth Day Event	Escondido
April 15, 2026	Green Business Expo	Carlsbad
April 21, 2026	Del Mar City Council Presentation	Del Mar
April 23, 2026	Palomar College Earth Week	San Marcos
April 24, 2026	Dr. Bronners Earth Week Extravaganza	Carlsbad
April 25, 2026	Earth Day/ Dia del Niño	Oceanside
April 30, 2026	Graze at the Fields	Carlsbad

Call Center Activity and Participation Statistics

The following chart reflects customer activity through February 28, 2026.



Call volumes to CEA's Call Center decreased 6% from January 2026 to February 2026. The most common call topics for all customers (commercial and residential) were related to Net Energy Metering, billing inquiries and Net Energy Metering cash out requests.

The total number of calls received, response times, and call duration through February 28, 2026, were as follows:

Call Center Monthly Summary – February 2026					
Stats by Month	**Feb**	**Jan**	**Dec**	**Nov**	**Total**
Total Calls	524	531	517	449	34,902
Total Calls Connected to Agents	520	525	513	449	34,252
Average Seconds to Answer	0:00:08	0:00:09	0:00:06	0:00:06	
Average Call Duration	0:09:12	0:08:45	0:09:27	0:10:08	

The following table reflects enrollments in CEA's power supply products by City. As of February 28, 2026, CEA has a total of 256,531 enrolled customer accounts as follows:

Member City	Eligible Accounts	Clean Impact – 50% Renewable	Clean Impact Plus - 75% Carbon Free	Green Impact – 100% Renewable	Participation Rate
Carlsbad	55342	181	49400	658	91%
Del Mar	3030	9	2758	71	94%
Escondido	57346	166	53458	70	94%
Oceanside	74802	229	69355	103	93%
San Marcos	38120	126	35284	74	93%
Solana Beach	7843	16	7001	149	91%
Vista	39615	92	36995	336	94%
TOTAL	**276,098**	**819**	**254,251**	**1461**	**93%**

Solar Plus and Battery Bonus Update

As of March 6, participation in the Solar Plus program remains steady. The program currently has 35 active applicants and 10 participants with fully installed systems that have received Permission to Operate (PTO), including two participants who received PTO in December 2025. At this time, the Battery Bonus program does not have any applicants in the pipeline.

Self-Generation Incentive Program (SGIP) funding has been nearly exhausted and new Solar Plus Connect and Battery Bonus Connect applications are limited to the waitlist. Solar Plus Connect has 34 active applicants and Battery Bonus Connect has 54, quantities that are subject to change if waitlist applications are approved or funding applications are rejected. Battery Bonus Connect has 42 systems installed. Of the

42 installations, 13 have received PTO and the rest are pending PTO approval. In the chart below, Complete means a system has been installed and has received PTO.

Member City	Solar Plus		Solar Plus Connect		Battery Bonus		Battery Bonus Connect	
Status	**Active**	**Complete**	**Active**	**Complete**	**Active**	**Complete**	**Active**	**Complete**
Carlsbad	7	1	3	0	0	0	9	3
Del Mar	0	0	1	0	0	0	1	0
Escondido	9	4	13	0	0	0	11	3
Oceanside	6	2	6	0	0	0	12	4
San Marcos	7	1	3	0	0	0	8	0
Solana Beach	0	0	1	0	0	0	1	0
Vista	6	1	7	0	0	0	12	3
TOTAL	**35**	**10**	**34**	**0**	**0**	**0**	**54**	**13**

SGIP funding for Solar Plus Connect and Battery Bonus Connect totals $970,490 and $1,112,196 respectively, in either approved or submitted funding. SGIP funding applied to Connect program customers may fluctuate as applications are reviewed, adjusted and approved. A breakdown of SGIP funding by member city is provided in the table below.

Member City	Solar Plus Connect	Battery Bonus Connect
Carlsbad	$85,120	$198,000
Del Mar	$26,032	$19,800
Escondido	$398,748	$257,400
Oceanside	$180,315	$379,788
San Marcos	$89,877	$198,000
Solana Beach	$25,426	$39,600
Vista	$164,972	$271,596
TOTAL	**$970,490**	**$1,112,196**

CEA and Participate.Energy have recently approved two new Channel Partners for the Solar Plus and Battery Bonus programs: HomeLink Solar and Semper Solaris. Each new Channel Partner must complete a series of clearances and meet program requirements before being certified as a Solar Plus installer.

Upcoming outreach events will feature a redesigned flyer promoting Solar Plus and Battery Bonus. CEA is no longer marketing the Connect programs due to the depletion of SGIP funding.

SGIP Updates Affecting Connect Programs

On February 20, 2026, the California Public Utilities Commission (CPUC) issued a ruling directing all SGIP Program Administrators (PAs) to enhance verification of Total Eligible Project Costs (TEPC) before distributing incentive payments for all Residential Solar and Storage Equity (RSSE) projects. CEA's Solar Plus Connect and Battery Bonus Connect programs are funded through AB 209 funds, which falls under the RSSE SGIP budget and is therefore subject to the new verification requirements.

As of now, no Solar Plus Connect systems have been installed, while 42 Battery Bonus Connect system installations have been completed. With the recent ruling, neither Participate.Energy (Solar Plus Connect) nor Haven (Battery Bonus Connect) will receive SGIP incentive payments until the PA reverifies TEPC for each project. This means intermittent delays in scheduling new installations for Solar Plus Connect and Battery Bonus Connect. For Battery Bonus Connect systems already installed, SGIP payments to Haven are temporarily on hold pending TEPC review.

CEA is currently working with other CCAs to collaborate on joint comments to the CPUC about the ruling. Comments are due March 18.

PeakSmart Savers Update

As of March 6, 2026, the PeakSmart Savers program has 50 active participants. Enrollment increased by one since last month's update, reflecting a continued slowdown in enrollments from November and December's email and mailer campaigns and limited in-person outreach toward the end of 2025 and early 2026. Participation is expected to increase as in-person engagement ramps back up, especially through upcoming Frontwave Arena and Earth Month events. PeakSmart enrollment by member city is as follows:

Member City	PeakSmart Savers Participants
Carlsbad	11
Del Mar	1
Escondido	6
Oceanside	16
San Marcos	2
Solana Beach	0
Vista	14
TOTAL	**50**

Oversight Committee (ROC)

The Risk Oversight Committee (ROC) met on March 5, 2026, during which staff provided an update on CEA's portfolio including energy hedges requirement and how CEA is meeting its renewable and carbon-free energy, resource adequacy and incremental capacity obligations. The ROC also received additional information on CEA's consideration of prepayment bonds. The next quarterly ROC meeting is scheduled for early June 2026.

Risk Contracts $50,000 - $100,000 entered into by Chief Executive Officer

VENDOR	DESCRIPTION	AMOUNT
None.		

FISCAL IMPACT:

There is no fiscal impact with this action.

Submitted for Board consideration:

____
Gregory Wade
Chief Executive Officer

ATTACHMENTS: None.

CLEAN ENERGY ALLIANCE

Staff Report

DATE: March 26, 2026

TO: Clean Energy Alliance Board of Directors

FROM: Greg Wade, Chief Executive Officer

ITEM 6: Consider Adoption of Resolution No. 2026-017 Approving the Fiscal Year (FY) 2025/26 – 2030/31 Clean Energy Alliance Energy Programs Plan

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RECOMMENDATION:

That the Clean Energy Alliance (CEA) Board of Directors (Board) adopt Resolution No. 2026-017 approving the FY 2025/26 – 2030/31 Clean Energy Alliance Energy Programs Plan.

BACKGROUND AND DISCUSSION:

At its April 24, 2025 Board Meeting, the CEA Board adopted the Fiscal Year (FY) 2025/26 – 2026/27 Strategic Plan. The plan identifies six Core Guiding Principles, including:

Core Guiding Principle 3 – Provide Beneficial Customer Programs: Offer a variety of programs that serve the needs of our customers, promote affordability, address communities of concern and further reduce GHG emissions.

To advance this principle, staff developed the Energy Programs Plan (Plan), which is a guiding framework for researching, designing, and implementing customer programs over the next five (5) years. The Plan incorporates community needs, outlines the business case analysis, and recommends a five (5) year portfolio of programs categorized into four (4) program pillars. The program pillars include:

1. **Clean Energy Supply and Grid Resilience:** Expand clean energy resources, increase midday load, and strengthen community resilience through distributed energy solutions.
2. **Building Electrification and Energy Efficiency:** Focus on reducing emissions and energy costs by transitioning buildings from fossil fuels to clean electricity sources and improving overall energy performance.
3. **Transportation Electrification:** Aims to accelerate the shift to zero-emission transportation by expanding EV adoption and charging infrastructure.
4. **Local Workforce and Community Education**: Focus on preparing the region for a clean energy future by investing in local talent and empowering communities through education.

The Plan includes a summary of community outreach activities, including surveys and workshops, an analysis of community demographics, service area energy use patterns and customer characteristics and a detailed program portfolio for 2026-2031, including existing programs and proposed initiatives with near-term, mid-term and long-term priorities.

Community Engagement and Input

Staff conducted community engagement across the CEA service territory to gather input that directly shaped the Plan. In April 2025, CEA partnered with True North, Inc. to conduct a statistically valid survey assessing community energy needs, customer values and program interests. CEA also partnered with Universidad Popular to conduct eight workshops, engaging 211 participants. Six (6) of the eight (8) workshops were offered in both English and Spanish, and the two (2) sessions were offered virtually. Feedback from these sessions directly informed program recommendations and prioritization. Full reports from the community workshops and survey are included as Attachment C and Attachment D.

Additionally, the Community Advisory Committee (CAC) received an early overview on April 10, 2025, allowing members to provide foundational feedback and guide early development of the Plan. The CAC had the opportunity to review the draft plan and provide written comments from Feb. 4 to Feb. 13, 2026. Finally, staff gave a presentation at the Feb. 12, 2026 CAC meeting to gather final feedback on the draft Plan.

PROGRAM BUDGET DISCUSSION/FISCAL IMPACT:

For FY 2024/25, the Board approved $600,000 for customer programs. As part of the long-term financial outlook, staff previously projected increasing annual program funding to $2 million in FY 2025/26, with planned increases of $2 million per year through FY 2028/29. As reviewed with the Board in September 2024, Section 7.6 of the Joint Power Authority (JPA) requires:

- Discretionary revenue may be used to:
  - Provide programs and develop projects of CEA;
  - Allow Member Agencies to direct funds into qualified CEA programs and projects or other customer benefits.
- The Board shall endeavor to achieve a balanced distribution of program and project benefits substantially commensurate with each Member Agency's energy load;
- The Board shall conduct periodic audits no less than every two years to verify the balanced distribution of program and project benefit and take corrective action necessary to achieve or continue to maintain a balanced distribution.

Based on load at the time, staff estimated the proportional distribution of the $600,000 FY 2024/25 funds. This exercise demonstrated that applying limited funding to a single benefit, such as the previously considered PCIA credit for CARE customers, would not deliver a meaningful or proportionate benefit across the service area.

Adopting the Energy Programs Plan today does not have an immediate impact on CEA's Budget. The Plan includes a list of recommended programs, for which staff will return to the Board at a later date with a full program design and proposed budget for the Board's consideration.

Submitted for Board consideration:

____

Gregory Wade
Chief Executive Officer

ATTACHMENTS:

A. Resolution No. 2026-017
B. Fiscal Year 2025/26 – 2030/31 Energy Programs Plan
C. True North Survey Results
D. Universidad Popular Community Workshops

CLEAN ENERGY ALLIANCE
RESOLUTION NO. 2026-017

A RESOLUTION OF THE BOARD OF DIRECTORS OF CLEAN ENERGY ALLIANCE APPROVING THE FISCAL YEAR 2025/26 – 2030/31 CLEAN ENERGY ALLIANCE ENERGY PROGRAMS PLAN

WHEREAS, Clean Energy Alliance (CEA) is a joint powers agency formed on November 4, 2019, under the Joint Exercise of Power Act, California Government Code section 6500 *et seq*.,

WHEREAS, the CEA Board of Directors adopted the FY 2025/26-27 Strategic Plan at its April 24, 2025 meeting,

WHEREAS, Staff has prepared the CEA 2025/26 – 2030/31 Energy Programs Plan for Board consideration; and

WHEREAS, the proposed Energy Programs Plan has been developed through the following process:

- Baseline demographic and customer research
- Input from the Community Advisory Committee
- Input from a statistically valid community survey
- Input from bilingual community workshops; and

WHEREAS, the adoption of the Energy Programs Plan will guide program priorities for the budget over the next five fiscal years; and

WHEREAS, the Final 2025/26 - 2030/31 Energy Programs Plan was presented to the Board for approval at its March 26, 2026 meeting.

NOW, THEREFORE, BE IT RESOLVED, by the Board of Directors of Clean Energy Alliance, as follows:

Section 1. The Board of Directors of Clean Energy Alliance hereby approves the Fiscal Year 2025/26 – 2030/31 Clean Energy Alliance Energy Programs Plan (Exhibit A).

The foregoing Resolution was passed and adopted this 26th day of March, 2026, by the following vote:

AYES:
NOES:
ABSENT:
ABSTAIN:

APPROVED:

____
Katie Melendez, Board Chair

ATTEST:

____
Ana Marie Alarcon, Clerk to the Board

Attachment B

Clean Energy Alliance

Energy Programs Plan

FY 2025/26 - FY 2030/31

Contents

Introduction

Clean Energy Alliance (CEA) is the local, not-for-profit electricity provider serving North San Diego County. In addition to offering residents and businesses renewable energy at competitive rates, CEA is committed to developing local energy programs that reflect community needs. This Energy Programs Plan (the Plan) serves as a strategic roadmap, shaped by community feedback, to guide the implementation of local energy programs. The plan directly supports the third Guiding Principle in CEA's Strategic Plan.[1]

Provide Beneficial Customer Programs – Offer a variety of programs that serve the needs of our customers, promote affordability and further reduce greenhouse gas emissions.

About Clean Energy Alliance

CEA serves approximately 255,000 customers across the cities of Carlsbad, Del Mar, Escondido, Oceanside, San Marcos, Solana Beach and Vista. CEA operates as a community choice aggregator (CCA), allowing the organization to purchase electricity on behalf of residents and businesses. As a locally governed entity, CEA empowers its member cities to meet their Climate Action Plan goals by offering higher renewable energy content than traditional investor-owned utilities, setting competitive rates and reinvesting revenues into local energy programs. As a joint powers authority, CEA functions independently from its member cities and is funded by ratepayers, not taxpayer dollars. CEA officially began serving customers in May 2021.

About the Energy Programs Plan

Purpose

CEA's Energy Programs Plan is designed to identify energy programs that reflect the diverse needs of CEA customers. This strategic plan provides a general framework for the implementation of programs that support CEA's mission and align with the organization's strategic goals.

Because CEA operates in a space that is rapidly and continuously evolving, this plan is intended to remain adaptive and responsive to changing conditions. As regulatory requirements, market dynamics and customer needs evolve, CEA may adjust its programs strategy accordingly to ensure it remains relevant, effective and aligned with the organization's strategic direction. All future programs and their associated budgets will be subject to approval by the Board of Directors.

1. https://thecleanenergyalliance.org/strategic-plan/

The plan's primary objective is to establish a general framework that enables CEA to

Promote Clean Energy Adoption
Encourage the adoption of renewable energy sources across all customer segments.

Promote the Development of a Wide Range of Energy Programs
Pursue energy efficiency, demand response programs, and energy consumption reduction goals.

Support Low to Moderate-Income Households
Connect customers to specialized programs that address the unique needs of low to moderate-income residential customers.

Facilitate Economic Development
Support commercial customers with energy programs that reduce costs and foster job creation and local development.

Increase Awareness and Participation
Develop effective marketing strategies to increase awareness and participation in CEA's energy programs.

Promote Rate Stability and Cost Savings
Promote or develop programs that reduce costs for customers and improve rate stability for CEA customers.

Methodology

To develop the Energy Programs Plan, CEA followed a comprehensive, multi-phase process designed to produce a framework that is both actionable and responsive to community needs. The development process included two phases.

Phase 1	CEA assessed and cataloged existing CCA customer programs, state and federal funding and grant opportunities, reviewed member cities' Climate Action Plans and conducted outreach through surveys and workshops.
Phase 2	Building on the information collected in Phase 1, CEA refined and evaluated potential offerings using community feedback, customer energy use data and their potential impact on CEA procurement, financial feasibility and sustainability.

This methodology helps ensure that CEA's energy programs are community-driven and aligned with CEA's strategic goals.

Understanding Community Needs

CEA exercised a multi-faceted approach to understand customer needs and priorities to inform the development of the Plan. CEA partnered with a research firm to conduct a scientific survey across its service territory, collaborated with a local community-based organization to host community workshops and gathered feedback from member agencies. These efforts ensure the Plan reflects real community needs.

Community Needs Survey

CEA partnered with True North Inc. to conduct a survey targeting a random sample of 509 residential and commercial customers across its seven member cities. The sample was proportionally balanced by geography and account type to ensure the results reflected insights from a broad and diverse customer base.

The survey employed a mixed-method design, using multiple recruitment channels, including email, text and phone with both online and phone response options available. The survey was conducted in both English and Spanish between April 9 and April 18, 2025.

Key Findings Summary

The survey was designed to provide CEA with a reliable understanding of customer awareness, opinions, priorities and behaviors related to energy issues, initiatives and programs. A summary of the key findings is available below, with the full report available in **Appendix A**.

- ⟶ CEA customers are sensitive to issues of cost and affordability. This could partially reflect the economic climate at the time of the survey and uncertainty related to tariffs.
- ⟶ The most important energy-related issues for customers are reducing their home/business energy costs, followed by having cleaner air to breathe in their home/building and avoiding power outages at their home/business.
- ⟶ Customers are generally supportive of most initiatives that can be taken to produce cleaner, greener energy and improve the reliability of North County's energy supply. They tend to prioritize initiatives that provide broad benefits as opposed to those that have more targeted benefits or involve new regulations/requirements.
  - At the other end of the spectrum, customers were less inclined to prioritize requiring all new construction to be all-electric, increasing the number of public access charging stations for electric vehicles (EV), increasing the number of EVs to reduce emissions and improving access to technical experts to advise on energy saving programs in the home/business.
- ⟶ Most CEA customers have made modest energy-related improvements to their homes/businesses, with the most common being the use of energy efficient lighting and weatherization improvements such as improved insulation, windows and/or roofs.
- ⟶ Energy-related programs that have broad application find the most interest among customers, especially rebates or incentives to install energy efficient lighting, appliances and equipment, discounted rates for energy used during off-peak times, free energy audits and incentives to install solar and battery storage.
  - At the other end of the spectrum, programs that garnered less interest include discounted rates for those who have medical equipment in their home, rebates and incentives to install EVs charging equipment and discounted rates for low-income households.
- ⟶ Most survey respondents were aware of their status as a CEA customer prior to taking the survey. When asked to rate various ways CEA could communicate with them, customers identified email, the CEA website, direct mail, electronic newsletters and utility bill inserts as the most effective methods.

Community Workshops

To deepen understanding of customer needs, particularly among historically underrepresented groups, CEA partnered with Universidad Popular, a trusted grassroots organization in North San Diego County, to host a series of bilingual community workshops. The workshops served as open forums to gather input from priority communities while remaining open and broadly promoted to all customers.

Universidad Popular was selected for its longstanding relationships and successful engagement with the local Spanish-speaking community, which represents approximately 21% of CEA's service area. Workshop locations were chosen based on the organization's recommendations, focusing on areas with high community participation. Two of the workshops were held during Universidad Popular's ongoing Citizenship Classes, which regularly draw large audiences.

	Date	Location	Language	Attendees
Workshop #1	Sept. 8, 2025	Escondido	English, Spanish	36
Workshop #2	Sept. 16, 2025	San Marcos	English, Spanish	88
Workshop #3	Sept. 17, 2025	Carlsbad	English, Spanish	19
Workshop #4	Sept. 24, 2025	Zoom	English, Spanish	14
Workshop #5	Oct. 20, 2025	Vista	English, Spanish	22
Workshop #6	Nov. 5, 2025	Oceanside	English, Spanish	19
Workshop #7	Nov. 6, 2025	Solana Beach/Del Mar	English	13

Key Findings Summary

During these workshops, participants consistently identified affordability as their top priority, alongside concerns about energy efficiency, reliability, sustainability and equitable access to programs.

Participants shared common energy-related barriers, including high energy costs, outdated or landlord-controlled appliances, financial constraints and limited awareness of available resources. Renters faced unique challenges due to tenancy restrictions, while many participants reported difficulty qualifying for assistance programs and expressed skepticism about the benefits of upgrades. Most attendees were unfamiliar with their energy bills and did not actively track energy use, citing confusing information and time constraints as barriers. Although interest in improvements such as LED lighting, solar panels, battery storage and electrification was high, upfront costs and information gaps remained major obstacles.

Participants generally emphasized a need for financial incentives, multilingual resources, renter-friendly options and hands-on education to make upgrades more accessible.

*A full report is available in **Appendix B**.*

Member City Insights

Staff from CEA's member agencies also provided input on their top priorities and ideas for programs that would best serve their communities. Several common themes emerged.

- ⟶ Programs that help member agencies meet Climate Action Plan (CAP) goals: agencies emphasized the need for programs that directly support CAP objectives, including building electrification, energy efficiency upgrades, renewable energy adoption and municipal infrastructure improvements such as EV charging and solar installations.
- ⟶ Programs that are easy to navigate and include educational components: streamlined application processes, clear explanations of benefits and concierge-style assistance were highlighted as critical for increasing participation as educational resources and in-person support can help customers understand available options and overcome barriers.
- ⟶ Programs that complement existing efforts: agencies want CEA programs to align with and enhance offerings from San Diego Gas & Electric (SDG&E) and San Diego Regional Energy Network (SDREN), avoiding confusion for customers.
- ⟶ Programs that prioritize equity and access: member agencies stressed the importance of targeting low-income households, renters, seniors and other hard-to-reach populations. Recommendations included tenant protections, translation and interpretation services and outreach strategies tailored to vulnerable communities.
- ⟶ Programs that address affordability: energy affordability remains a top concern for residents. Agencies expressed strong interest in rebates and incentives for electrification technologies such as heat pump water heaters and HVAC systems, induction cooktops, electric dryers and electric panel upgrades paired with appliance installations. Solar and battery storage incentives were also noted as priorities.

Overall, member agencies want programs that are simple, equity-focused and education-supported with affordability solutions and clear alignment with local climate goals.

Service Area Analysis

CEA also conducted internal research to better understand those who live in the organization's service area and how they use energy. Our seven member cities, Carlsbad, Del Mar, Escondido, Oceanside, San Marcos, Solana Beach and Vista, each have distinct populations, housing types, income levels and energy needs. By analyzing data from the U.S. Census Bureau, CEA's customer database and local energy use patterns, staff formed a clearer picture of member communities and what type of energy programs might be most beneficial.

Demographics

Unless otherwise noted, the data in the demographics charts below are from the U.S. Census Bureau's Profile[2] for each city as of September 2025.

Population

Oceanside is the most populous member city in CEA, with 174,068 residents, followed by Escondido (151,038) and Carlsbad (114,746). These three cities together account for a significant portion of the total service area population. San Marcos (94,833) and Vista (98,381) have similar population sizes; each just shy of 100,000 residents. On the other end of the spectrum, Solana Beach (12,941) and Del Mar (3,954) are the smallest member cities with populations significantly smaller than the other five cities.

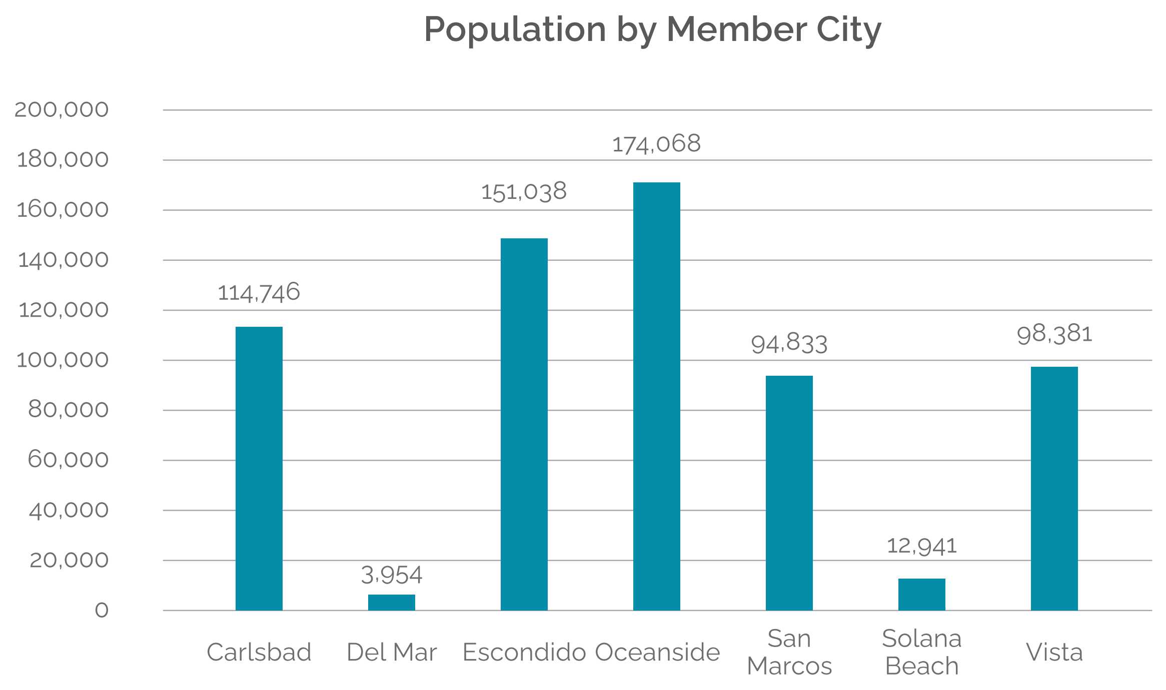

Figure 1 Population comparison of CEA member cities.

2 U.S. Census Bureau Profiles:
Carlsbad: https://data.census.gov/profile/Carlsbad_city,_California?g=160XX00US0611194
Del Mar: https://data.census.gov/profile/Del_Mar_city,_California?g=160XX00US0618506
Escondido: https://data.census.gov/profile/Escondido_city,_California?g=160XX00US0622804
Oceanside: https://data.census.gov/profile/Oceanside_city,_California?g=160XX00US0653322
San Marcos: https://data.census.gov/profile/San_Marcos_city,_California?g=160XX00US0668196
Solana Beach: https://data.census.gov/profile/Solana_Beach_city,_California?g=160XX00US0672506
Vista: https://data.census.gov/profile/Vista_city,_California?g=160XX00US0682996

Housing

Housing in each member city generally reflects population size. The largest housing inventories are in Oceanside (approximately 68,000 units), Carlsbad (47,500 units) and Escondido (49,000 units). Vista (roughly 36,000 units) and San Marcos (about 32,000 units) represent the middle tier in terms of housing volume. Solana Beach and Del Mar have the least housing units, with approximately 6,300 and 2,500 units, respectively.

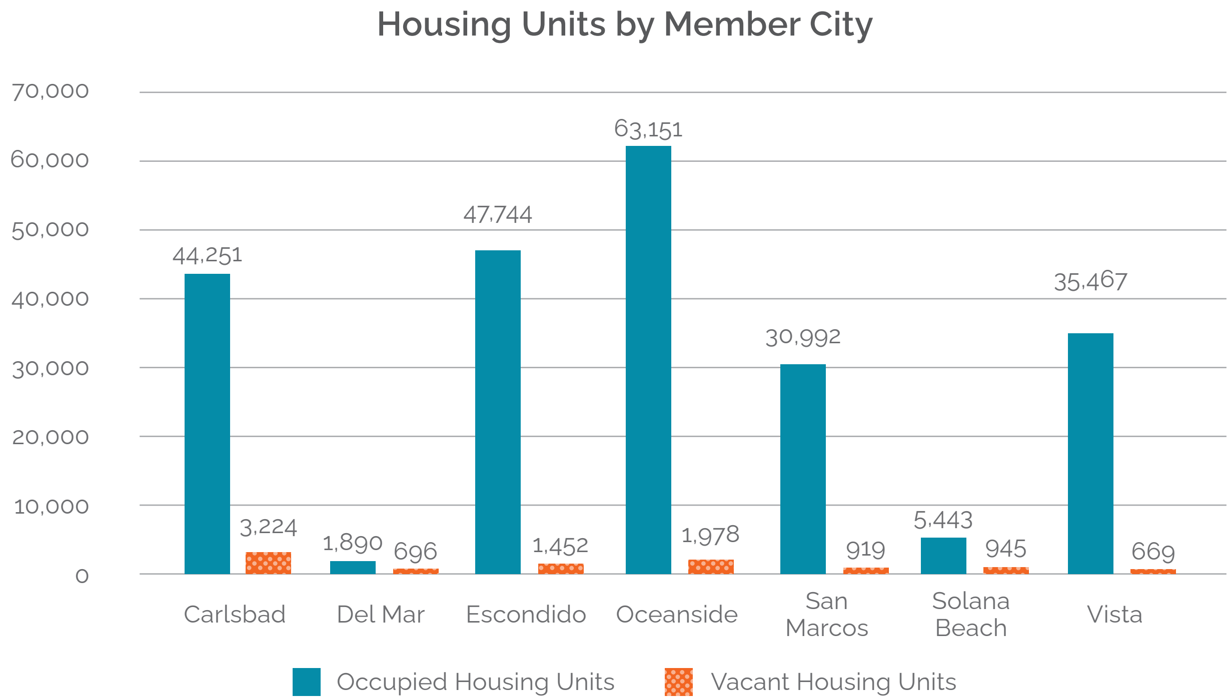

Figure 2 Total number of occupied and vacant housing units in each CEA member city.

Income

Income levels vary across the region. Del Mar has the highest median annual household income at $192,845, followed by Solana Beach ($150,820) and Carlsbad ($144,444). Escondido ($102,145) and Oceanside ($104,809) have comparatively lower median incomes within CEA's service area, with San Marcos ($109,520) and Vista ($105,671) falling slightly higher but within a similar range. Overall, the income distribution groups CEA's member cities into two broad economic categories: higher-income communities (Del Mar, Carlsbad, Solana beach) and moderate-income communities (Escondido, Oceanside, San Marcos, Vista).

Language

Language diversity is a defining characteristic of several communities in CEA's service area. In Escondido, Oceanside, Vista and San Marcos, a significant portion of residents speak a language other than English at home, primarily Spanish. In contrast, Del Mar, Solana Beach and Carlsbad tend to have higher proportions of English-only households.

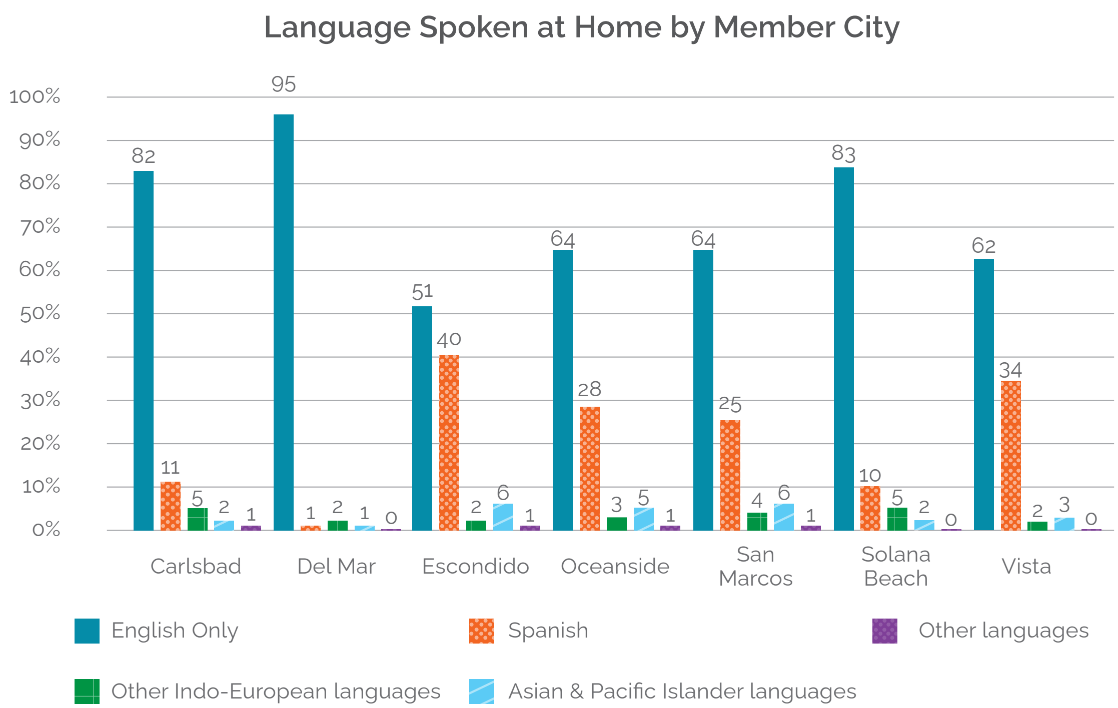

Figure 3 Percent distribution of language spoken at home in each CEA member city.

Education

Education levels are highest in Del Mar where approximately 85% of residents hold a bachelor's degree or higher, followed by Solana Beach (~72%) and Carlsbad (62%). Vista (~33%) and Escondido (~34%) have the lowest rates while San Marcos (~46%) and Oceanside (~39%) fall in the middle.

Age

Age profiles vary widely in CEA's service area. At the upper end of the age range, Del Mar has the oldest population, with a median age of 55.5 years, reflecting a community that is likely home to many retirees. Solana Beach follows with a median age of 47.9 and Carlsbad with a median age of 45. On the younger end, Escondido (35.7), San Marcos (36.4) and Vista (37.9) represent cities with younger households. Oceanside, with a median age of 42, sits in the middle, reflecting a mix of younger and older residents.

Customer Profile

CEA's customer base reflects a diverse mix of residential, commercial and industrial accounts across multiple cities and climate zones. The data presented in this section provides insight into participation trends, program enrollment and characteristics that influence energy use and program adoption[3].

General Participation

CEA serves seven member cities with approximately 274,000 eligible customers. Participation in CEA is strong across all cities, with approximately 93% of eligible customers enrolled in CEA service. Oceanside has the largest customer share with roughly 74,100 eligible customers and about 69,200 participating, followed by Carlsbad and Escondido, each with over 50,000 participating customers. Vista and San Marcos fall into the middle tier, both with more than 35,000 participating customers. Solana Beach and Del Mar represent smaller segments, consistent with their smaller populations.

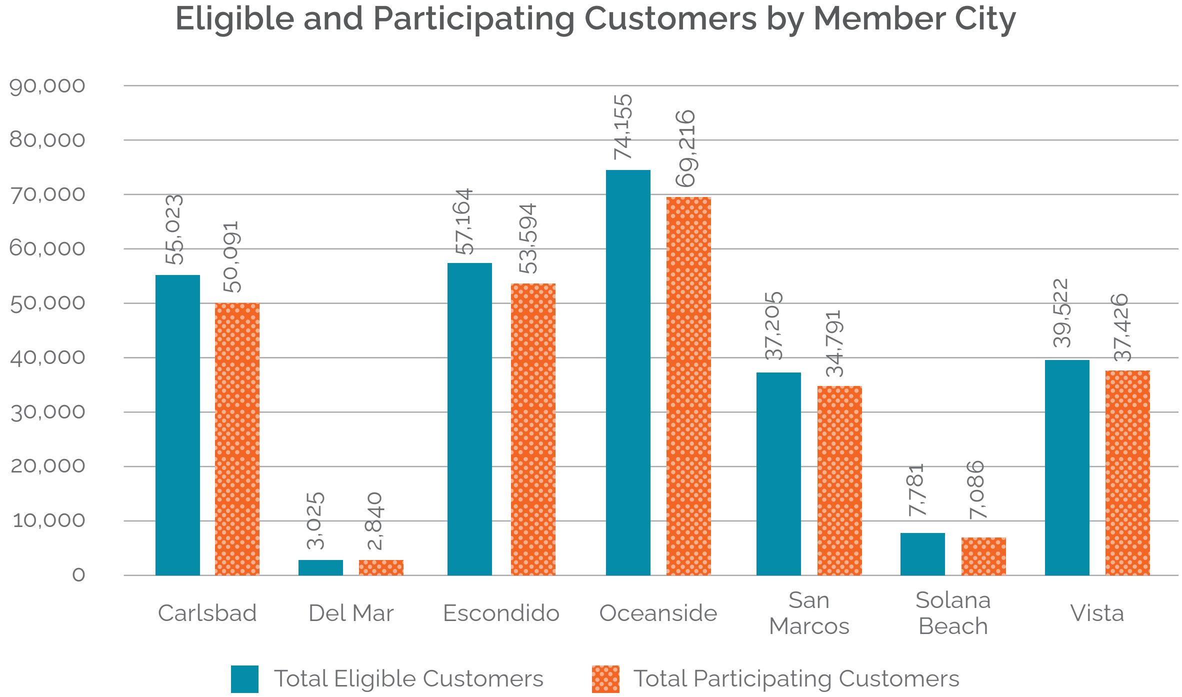

Figure 4 Comparison of total eligible customers and participating customers across member cities.

3 Unless otherwise stated, the customer profile data included in this section is from July 2025.

Customer Category

CEA's customer base is predominantly residential across all member cities, with residential customers consistently representing between 84% and 91% of total customers. Commercial customers represent a smaller but consistent share, averaging 13% overall across member cities. Solana Beach and Del Mar, though smaller in size, have the highest proportion of commercial customers at 16% and 15%.

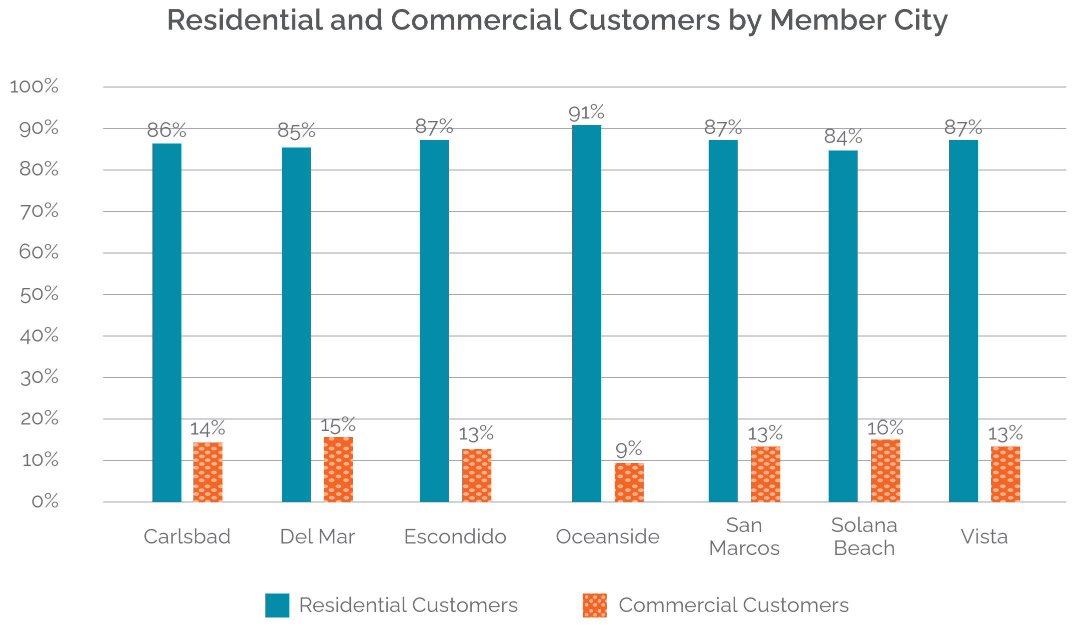

Figure 5 Percent of residential and commercial customers in each member city.

Solar Customers

Customer participation in self-generation, such as onsite solar and battery storage, varies across CEA's member cities. On average, customers with solar systems represent about 20% of all customers. Solar adoption is highest in San Marcos and Escondido, where warmer temperatures and higher seasonal use contribute to larger utility bills, making self-generation particularly attractive in these communities.

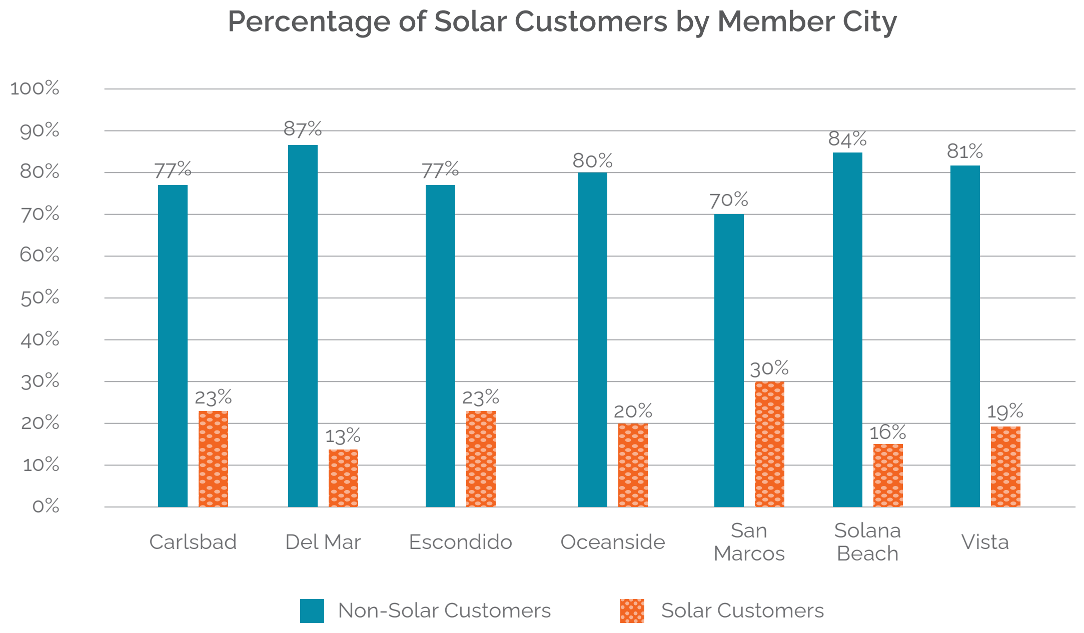

Figure 6 Percentage of customers with solar systems in each member city.

Energy Plan Enrollment

CEA offers customers three energy plans: Clean Impact (50% renewable energy content), Clean Impact Plus (75% carbon-free and 50% renewable energy) and Green Impact (100% renewable energy). Across all member cities, most customers are enrolled in CEA's default product Clean Impact Plus, accounting for over 98% of customers. Optional products show less adoption with Clean Impact representing 0.5% and Green Impact representing about 1-2% of customers in most cities. Opt ups have occurred at a higher rate than opt downs, driven in part by some member cities choosing to transition their municipal facilities to the 100% renewable Green Impact plan.

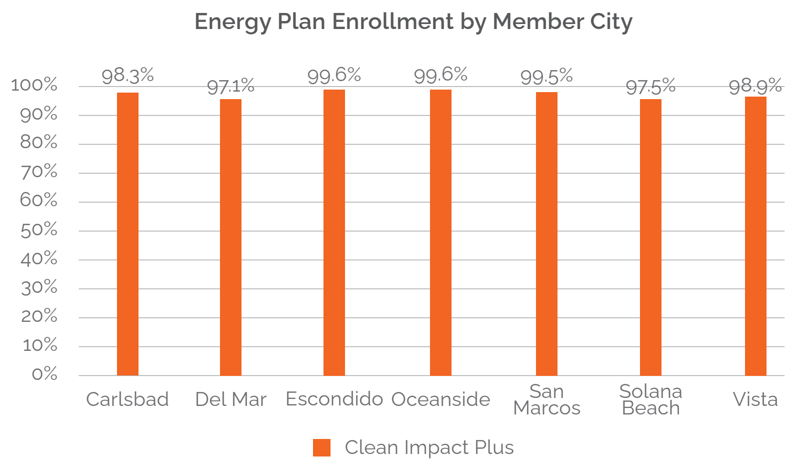

Figure 7 Percentage of customers enrolled in each energy plan by member city.

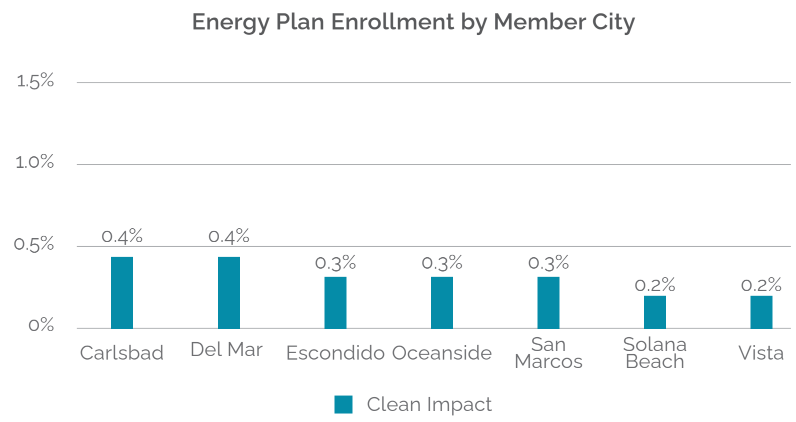

Figure 7 Percentage of customers enrolled in each energy plan by member city.

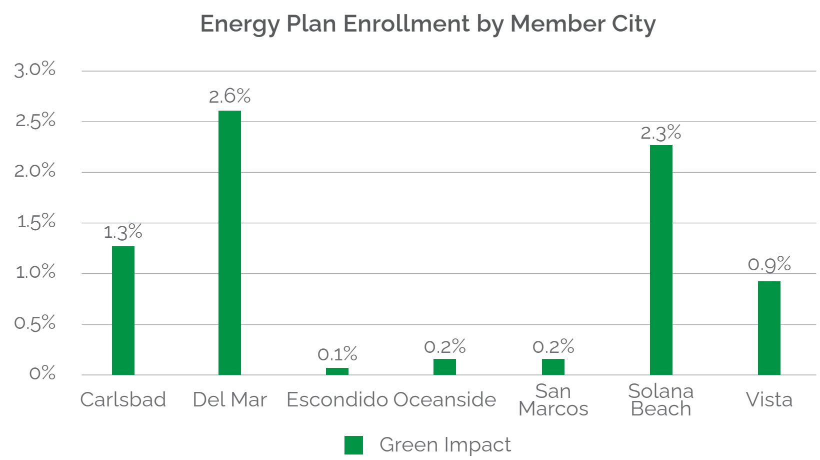

Figure 7 Percentage of customers enrolled in each energy plan by member city.

Climate Zones

The California Energy Commission has established 16 climate zones across California, which provide standardized weather data used for energy-efficiency analysis, equipment sizing, baseline allowances and related applications. Most CEA accounts are in Coastal zones, totaling about 65% of all accounts. Mountain zones account for approximately 35% of CEA accounts[4]. Desert zones, with only three outlier accounts, have virtually no representation in CEA territory and were therefore excluded from the chart below.

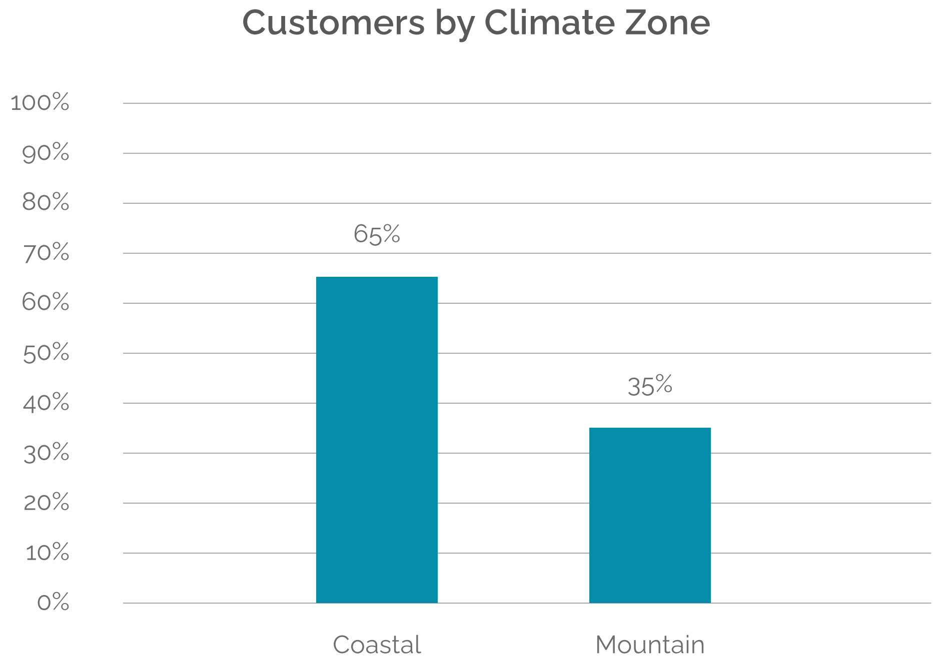

Figure 8 Percentage of total customers by climate zone.

4. Based on data from November 2025.

CARE, FERA and Medical Baseline Participation

Across all member cities, California Alternate Rates for Energy (CARE) represents the largest share of income-qualified customer enrollment, but the level of participation varies widely based on each community's socioeconomic profile. CARE customers account for 3% to 28% of all customers across the region. Escondido has the highest share at about 28%, reflecting its larger proportion of income-eligible households. Oceanside and Vista also show relatively high participation at around 19% each. San Marcos and Carlsbad fall in the mid-range with approximately 16% and 9% respectively, while the more affluent coastal communities of Solana Beach and Del Mar remain below 5%, consistent with higher household incomes and fewer qualifying customers.

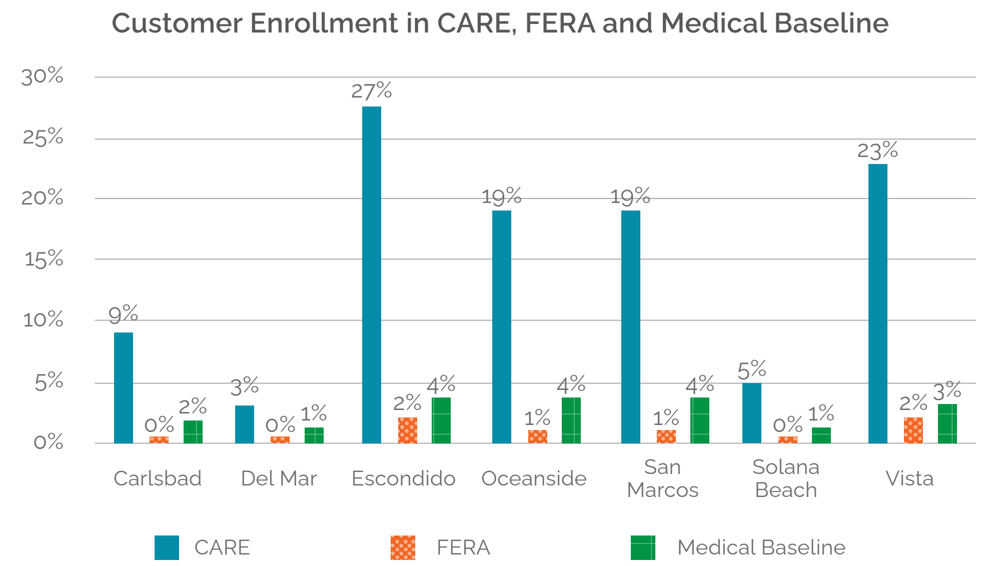

Figure 9 Percent of each member city's total customers enrolled in CARE, FERA or Medical Baseline programs.

Payment Plans

Participation in payment plans is relatively low across member cities, averaging about 2% of all customers. Escondido shows the highest enrollment at approximately 4%. Oceanside, Vista and San Marcos each report participation of around 3%. In contrast, Carlsbad and the higher-income communities of Solana Beach and Del Mar have the lowest payment plan enrollment rates.

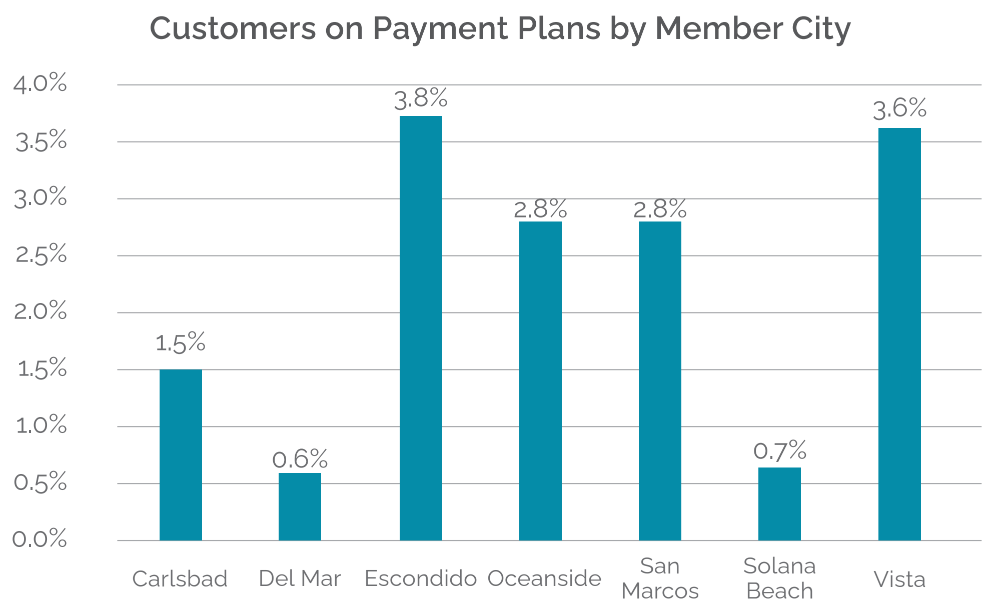

Figure 10 Percent of each member city's customers on a payment plan.

Energy Use Patterns

Energy Use by City

Energy use across CEA's member cities varies, shaped by differences in population size, customer mix and presence of high-demand commercial facilities. Carlsbad stands out in terms of the energy load distribution, representing 32% of total energy use, despite not having the largest number of customers. This is primarily due to the presence of large commercial customers. Oceanside (23%), Escondido (18%), Vista (13%) and San Marcos (11%) reflect more balanced profiles that mix residential use with moderate commercial activity. The smallest contributions come from Solana Beach (2%) and Del Mar (1%), consistent with their smaller, largely residential populations and limited commercial load.

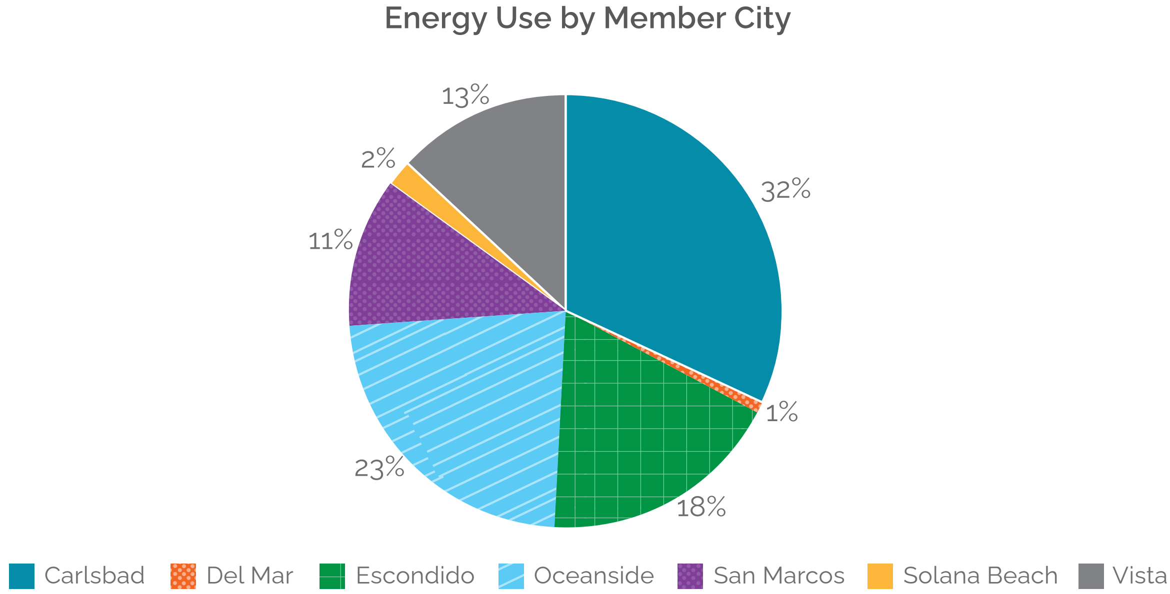

Figure 11 Percentage share of total energy use by customers in each member city.

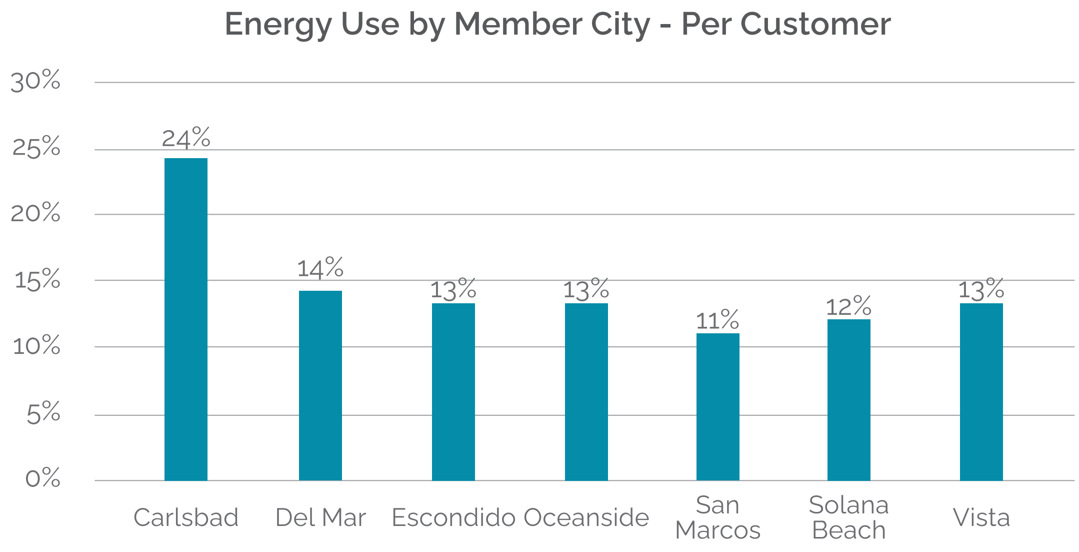

Figure 12 Percentage share of total energy use by customers in each member city, per customer.

While the total energy use distribution in Figure 11 shows which member cities contribute most to CEA's overall load, it does not reflect how that usage is distributed across individual customers. When looking at average energy use per customer, Carlsbad still ranks highest, reinforcing the influence of its large commercial users on overall demand. Del Mar and Solana Beach, despite their small shares of total load, show higher per-customer consumption, possibly due to their closer balance between commercial and residential accounts, relatively lower solar adoption and larger properties. Escondido, Oceanside and Vista fall into a moderate range, consistent with their mix of residential customers and small to medium business activity. San Marcos exhibits slightly lower per-customer use, reflecting its higher adoption of solar and energy storage, which helps reduce average grid consumption.

Energy Use by Customer Type

CEA customer energy use patterns vary by season, reflecting shifts in weather, daylight hours and customer energy-use behavior. Changes by season are evident when looking at energy use during the months of January, April and September, representative months that highlight seasonal energy demand trends in CEA's service area.

In January, energy use is moderate but shows two daily peaks, one in the morning and another in the evening, likely due to heating, lighting and appliance needs, with a midday dip when solar power comes online. With few daylight hours and more cloudy days in winter months, there is less solar generation and fewer solar generating hours.

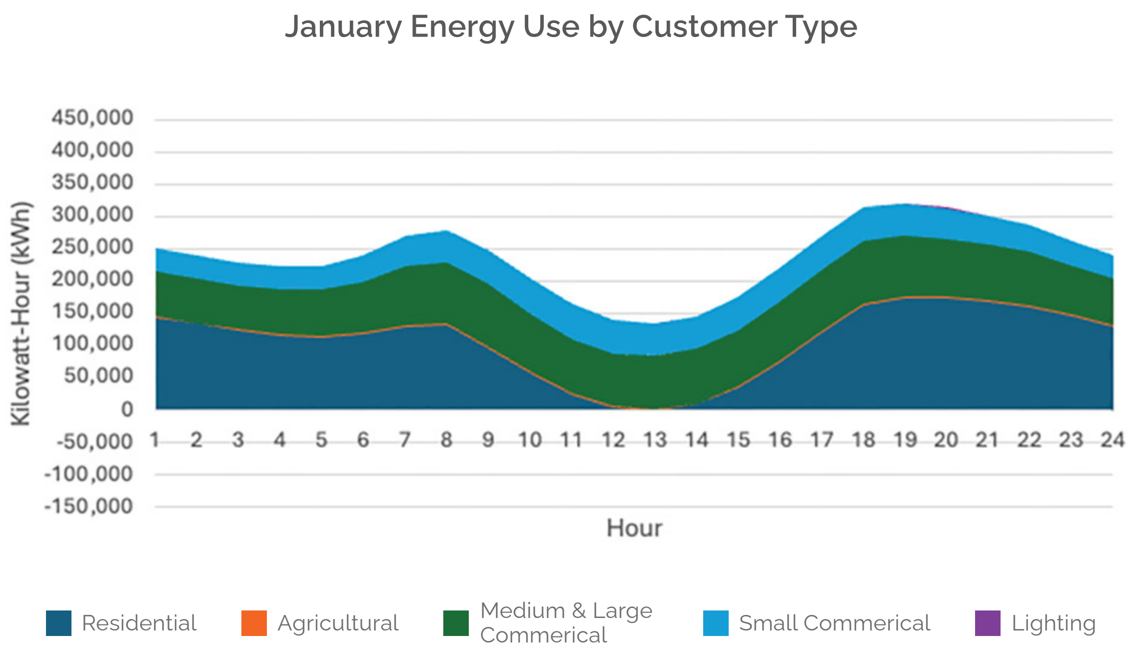

Figure 13 Average hourly energy use by customer type over a 24-hour period in January.

In April, overall energy use is at its lowest. Mild temperatures mean most homes and businesses don't need much heating or cooling. During the middle of the day, electricity use drops sharply because rooftop solar panels are producing a lot of power; daylight hours are longer than winter months (which allows for more hours of solar generation) and many days in the spring are sunny, leading to some of the periods where behind-the-meter solar from CEA's own customers can service essentially all of CEA's load. At these times, many customers use very little electricity from the grid and some customers (especially residential customers) even send excess solar energy back to the grid, creating a noticeable midday dip in grid demand before use rises later in the day.

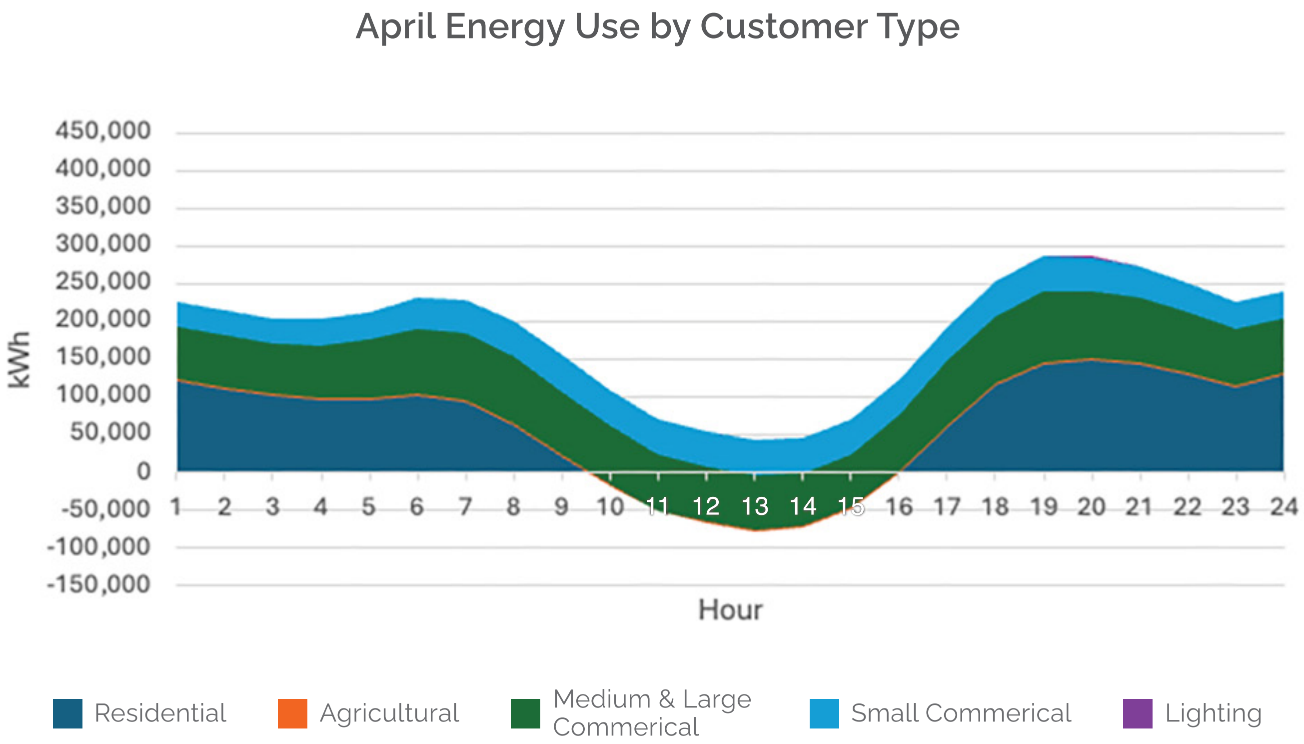

Figure 14 Average hourly energy use by customer types over a 24-hour period in April.

In September, energy use is at its highest. Hot weather leads to heavy air-conditioning use throughout the day and there's a strong increase in net load in the late afternoon when temperatures are still high and air conditioning is running but solar generation is decreasing.

September Energy Use by Customer Type

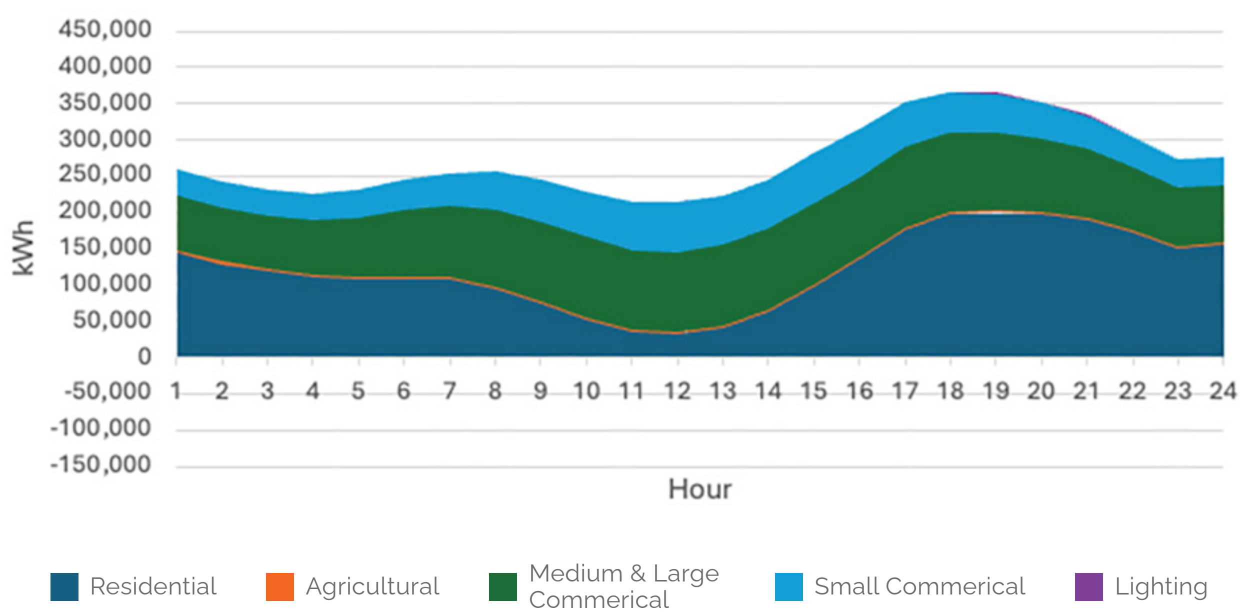

Figure 15 Average hourly energy use by customer types over a 24-hour period in September.

CEA can also gather insights by looking at smaller segments of the customer base. For example, CARE and FERA households make up a small segment of CEA's overall total energy load, but their hour-by-hour energy use closely matches the overall energy use patterns. Although these customers represent a relatively small portion of total load, they tend to use energy at the same times of day as the broader customer base, showing similar evening peaks and midday lows.

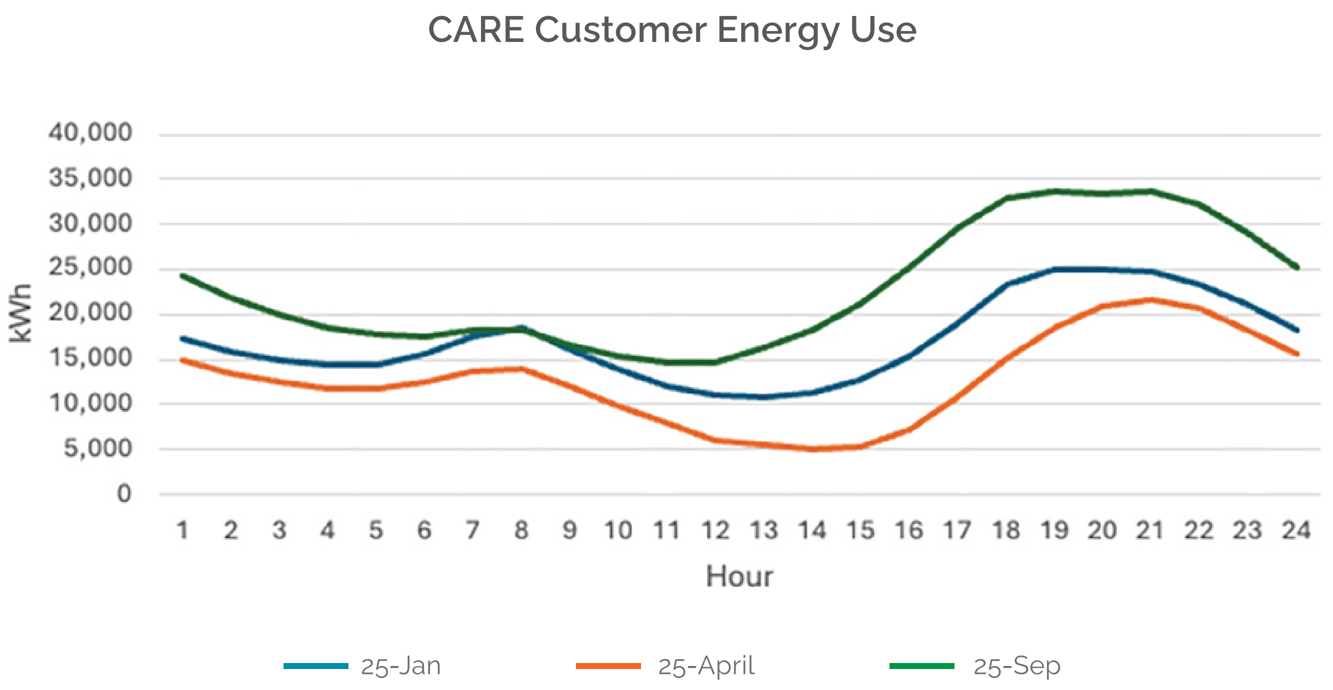

Figure 16 Comparison of average hourly energy use of CARE customers over a 24-hour period in various months.

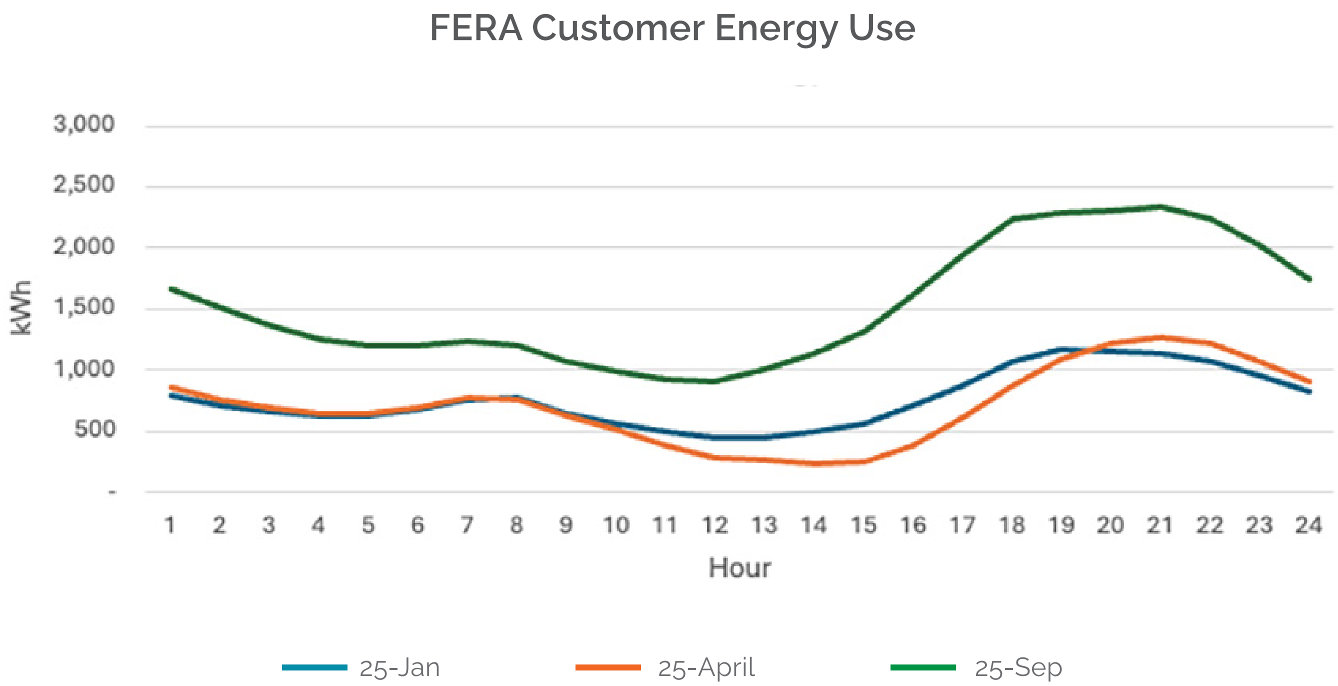

Figure 17 Comparison of average hourly energy use of FERA customers over a 24-hour period in various months.

Program Recommendations

Current Programs

CEA began offering customer programs in 2024 with the launch of Solar Plus, a solar and battery storage program for single-family residential customers. Since then, CEA has introduced and actively operates a variety of programs that primarily serve residential customers, with some offerings available to commercial customers.

CEA's initial suite of programs was intentionally selected to prioritize offerings that could be deployed with low or no cost to CEA, require limited administrative support from CEA's lean staff and support peak load reduction. All programs offered to date have been provided at no cost to CEA and no discretionary CEA funds have been used to support their implementation.

The programs recommended in this plan are intended to complement existing options and provide a roadmap for future initiatives.

SOLAR PLUS Residential

Solar Plus Residential

Offers residential customers on-bill financing for solar and battery storage. For a limited time, CEA also offered **Solar Plus Connect**, which used Self-Generation Incentive Program (SGIP) funds to partially cover the cost of solar and battery systems for income-qualified customers. As of January 2026, the Solar Plus program has eight participants with operational systems and 23 participants with active applications. The Solar Plus Connect program has 34 customers with pending system installations with $1,053,458 in secured SGIP funding.

BATTERY BONUS

Battery Bonus

Offers residential customers with existing solar on-bill financing for battery storage. For a limited time, CEA also offered Battery Bonus Connect, which used SGIP funds to provide no-cost battery systems for income-qualified customers. The Battery Bonus program currently has no active applicants, in part because the income-qualified Battery Bonus Connect program launched at the same time. Battery Bonus Connect has 58 customers with pending system installations and $1,174,853 in secured SGIP funding.

SOLAR PLUS Business

Solar Plus Business

Offers commercial, multi-unit residential and municipal customers on-bill financing for solar and battery systems as well as storage only systems. Launched most recently in November 2025, the Solar Plus Business program does not yet have active applicants.

Current Programs Continued

PeakSmart Savers
A residential demand response program that incentivizes customers to reduce energy use during peak hours on high-demand days. The program currently has less than 100 participants.

Local Solar
A feed-in tariff program that encourages small-scale front-of-the-meter renewable energy projects in CEA's service area. CEA has received inquiries from project developers regarding this program but has yet to receive a formal submission at the program's current price offer level.

Program Portfolio Overview (2026-2031)

CEA's Energy Programs Plan is structured around four strategic pillars, each designed to accelerate the transition to clean energy, enhance resilience and deliver equitable benefits to the communities we serve. Each pillar includes key initiatives phased across five years, with CEA acting as the direct implementor or supporter of external initiatives.

Programs Pillars

1. **Clean Energy Supply and Grid Resilience:** Expand clean energy resources, increase midday load and strengthen community resilience through distributed energy solutions.

2. **Building Electrification and Energy Efficiency:** Focus on reducing emissions and energy costs by transitioning buildings from fossil fuels to clean electricity sources and improving overall energy performance.

3. **Transportation Electrification:** Aims to accelerate the shift to zero-emission transportation by expanding EV adoption and charging infrastructure.

4. **Local Workforce and Community Education:** Focus on preparing the region for a clean energy future by investing in local talent and empowering communities through education.

CEA's role is not limited to creating programs; it also includes supporting and connecting customers to resources and opportunities, including supporting outreach for programs offered by other entities like the San Diego Regional Energy Network (SDREN) and California Energy Commission (CEC).

Business Case Analysis

In addition to community feedback, programs have been analyzed based on their potential impact to CEA procurement, financial feasibility and sustainability of each proposed program offering. Each program initiative was evaluated on the following Impact Types and was rated using a stoplight-style scorecard to show its overall impact.

Impact Types	Description	Why It Matters	Example: Solar and Battery Storage Programs
Peak Value Reduction	How a program affects electricity use during the busiest hours of the day.	Reducing peak use helps CEA lower overall power costs and makes the electric grid more reliable when it's under the most stress.	Energy stored in batteries can be used during busy, high-demand times, reducing peak demand.
Renewable Content Value	How a program affects CEA's ability to provide 100% renewable energy.	Staying aligned with renewable energy goals supports CEA's mission.	Solar energy aligns with CEA's renewable energy goals, but extra midday renewable isn't always needed[5]. Storage allows customers to use solar energy later in the day, leading to a moderate positive benefit.
Anticipated Revenue Impact	How a program may affect the amount of money CEA receives from customers using electricity.	Understanding revenue changes helps CEA maintain financial stability.	Customers with solar and battery storage will buy less electricity from CEA, but the overall revenue impacts are anticipated to be low.
Anticipated Administrative Costs	How many resources and expenses it might take for CEA to run a program.	Programs requiring fewer resources cost less to operate.	Existing solar and battery storage programs require limited staff time and funding to run.

Legend

Color	Description	What It Means
	Strong Positive Effect	The program may have a strong and direct positive effect on the Impact Type.
	Moderate Positive Effect	The program may have a moderate or indirect positive effect on the Impact Type.
	Moderate Negative Effect	The program may have a moderate or indirect negative effect on the Impact Type.
	Strong Negative Effect	The program may have a strong and direct negative effect on the Impact Type.
	No Effect	The program is not expected to have any effect on the Impact Type.

5. See Figure 15 - April Energy Use by Customer Type.

The Program Initiative tables below display timing that is general and subject to change. Timing is organized into three general phases for program implementation: Near-Term (2026-2027), Mid-Term (2028) and Long-Term (2029-2031). Some programs are also listed as Ongoing due to their continuous nature.

Pillar 1: Clean Energy Supply & Grid Resilience

Program Initiative	Timing	Description	Target	Peak Reduction Value	Renewable Content	Revenue/Sales Impact	Administrative Costs
Residential Behind-the-Meter Solar & Battery Storage/ Battery Storage Only	Ongoing	Provide access to rooftop solar and storage or battery-only systems.	Residential single family	●	●	●	●
Commercial Behind-the-Meter Solar & Battery Storage/ Battery Storage Only	Near-Term	Provide access to rooftop solar and storage or battery-only systems.	Small businesses, school districts and critical facilities	●	●	●	●
Community Resilience Hubs	Long-Term	Collaborate with member cities and school districts to equip municipal facilities with behind-the-meter solar and storage to support resiliency.	Public agencies	●	●	●	●
Demand Response	Near-Term	Expand PeakSmart Savers program to commercial customers and support compliance with Load Management Standards.	Commercial customers	●	●	●	●
Load Flexibility + Virtual Power Plant	Mid-Term	Incentives for customers to shift load and aggregate distributed energy resources (DERs) into a Virtual Power Plant for grid support.	Residential and commercial customers	●	●	●	●
Discounted Green Impact Rate for Income-Qualified Customers	Long-Term	Design a discounted rate for income-eligible customers to participate in 100% renewable energy.	Low-income customers	○	●	●	●
Plug-In Solar	Long-Term	Monitor California legislation related to plug-in solar and prepare to connect residential customers with external incentive opportunities.	Residential customers	○	●	●	○

Pillar 2: Building Electrification & Energy Efficiency

Program Initiative	Timing	Description	Target	Peak Reduction Value	Renewable Content	Revenue/Sales Impact	Administrative Costs
Electrification Incentives	Mid-Term	Incentives for switching from gas to high-efficiency electric heat pumps, water heaters, induction cooktops, etc.	Residential income-qualified customers	Red	Orange	Dark green	Orange
Energy Efficiency Kits	Near-Term	Free or low-cost kits filled with simple equipment for self-service energy efficiency upgrades.	Income-qualified and/or residential	Orange	Light green	Red	Orange
Refrigeration Efficiency	Near-Term	Support energy-efficient refrigeration upgrades to reduce energy costs.	Small commercial	Orange	Light green	Red	Orange
Building Electrification Navigator	Mid-Term	Technical assistance for medium-sized businesses and public agencies, including energy assessments.	Medium commercial	Red	Orange	Dark green	Light green

Pillar 3: Transportation Electrification[6]

Program Initiative	Timing	Description	Target	Peak Reduction Value	Renewable Content	Revenue/Sales Impact	Administrative Costs
EV Charger Rebate	Mid-Term	Rebates for smart Level 2 chargers integrated with time-of-use optimization.	Residential customers	Orange	Light green	Dark green	Orange
Multi-Unit Dwelling (MUD) Charging	Long-Term	Support turnkey solutions for multi-family buildings lacking EV infrastructure.	Renters	Orange	Light green	Dark green	Red
EV Managed Charging and Virtual Power Plant	Mid-Term	Leverage advanced technology to integrate EV's into CEA's VPP and incentive charging to maximize savings and renewable energy.	EV owners	Light green	Light green	Dark green	Orange
Municipal & Fleet Electrification Partnerships	Long-Term	Vehicle fleet advisory services and/or incentives for member cities, school districts and public agencies.	Public agencies	Orange	Light green	Dark green	Orange

6. For the programs in Pillar 3, Peak Reduction Value and Renewable Content could lean further positive with systems that incentivizes midday charging rather than evening or overnight charging.

Pillar 4: Local Workforce and Community Education

Program Initiative	Timing	Description	Target	Peak Reduction Value	Renewable Content	Revenue/Sales Impact	Administrative Costs
Clean Energy Equity Fund	Long-term	Establish dedicated funding for grants supporting income-qualified programs, financing pilots and community-led clean energy projects.	Low-income customers, non-profits, community partners	●	●	●	●
Workforce Training & Pre-Apprenticeship Programs	Long-Term	Support workforce training programs, including efforts by the California Energy Commission's Equitable Building Decarbonization grant and the San Diego Regional Energy Network.	Educational institutions and community partners	○	○	○	○
Community Innovation Grants	Long-Term	Annual competitive grants to pilot new climate solutions and education programs.	Non-profits and member agencies	○	○	○	○
Energy Literacy and Education	Ongoing	Leverage partnerships for multilingual outreach, including workshops, to engage hard-to-reach communities, focusing on general topics like CEA awareness and specific topics like bill payment assistance options	Non-profits and community partners	○	○	○	○

What's Next

CEA's Energy Programs Plan establishes a framework for prioritizing program development over the next five years. The Plan serves as a foundational resource, providing baseline information to support informed decision-making around programs. While the Plan outlines recommendations, implementation will ultimately depend on available funding, regulatory requirements, market conditions and emerging technologies.

The Plan represents a significant milestone in CEA's commitment to its customers and the region. As technology evolves and customer needs change, CEA will continue to build upon this foundation, introducing new programs and partnerships that drive progress toward a cleaner, more resilient energy future for North County San Diego.

At the end of FY 2030/31, CEA will review and update the Plan to measure progress and guide planning for the following five years. CEA will also review and refresh the Plan at the mid-cycle point in FY 2028.

Appendices

Appendix A – True North Community Survey

Customer Opinion Survey

Summary Report

Prepared for

Clean Energy Alliance

April 2025

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INTRODUCTION

Clean Energy Alliance (CEA) is a Joint Powers Authority comprised of seven cities in north San Diego County—the cities of Carlsbad, Del Mar, Escondido, Oceanside, San Marcos, Solana Beach, and Vista. CEA follows a community choice aggregation (CCA) model that allows local governments to purchase power to meet their community's electricity needs, offering an alternative to investor-owned utilities. Although CEA is locally operated, it works in partnership with the region's existing investor-owned utility (San Diego Gas & Electric - SDG&E). CEA purchases electricity directly from energy suppliers, while SDG&E continues to deliver energy, maintain the grid, provide billing services, and handle all new service requests and emergencies.

By pooling energy demand across multiple cities, CEA is able to leverage more purchasing power and ensure a higher renewable content, thus providing local residents and businesses with cleaner energy. Locally controlled and supported by ratepayers with no taxpayer subsidies, CEA ensures that revenues are reinvested in local energy infrastructure and energy efficiency programs for customers.

MOTIVATION FOR RESEARCH Fulfilling its mission to empower local residents and businesses to participate in a cleaner, greener energy future requires that CEA have reliable information about customers' energy-related perceptions, opinions, priorities, and behaviors. What are the major challenges and issues that CEA customers face? How do they prioritize among energy issues and initiatives? What energy improvements have they made and/or are interested in making to their residences or businesses? To what extent are customers aware of the energy programs and solutions that are available, and which programs capture their interest? Answers to questions like these provide CEA with information that can be used to make sound, strategic decisions in a variety of areas—including performance management, planning, program development/evaluation, marketing, and customer engagement.

OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 39). In brief, the survey was administered to a stratified random sample of 509 residential and commercial customers within CEA's service area. The sample was balanced to proportionately represent the distribution of customers geographically across the seven member cities, as well as by account type (residential or commercial). The survey followed a mixed-method design that employed multiple recruiting methods (email, text, and phone) and multiple data collection methods (online and phone). Administered in English and Spanish between April 9 and April 18, 2025, the average interview length was 16 minutes.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the section titled *Key Findings* is for you. It provides a summary of the most important factual findings of the survey in a Question & Answer format. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the survey by topic area (see *Table of Contents*), as well as a description of the methodology employed for collecting and analyzing the data. And, for the truly ambitious reader, the questionnaire used for the interviews is contained at the back of this report, and a complete set of crosstabulations for the survey results is contained in Appendix A.

ACKNOWLEDGEMENTS True North thanks Clean Energy Alliance for the opportunity to conduct the study and for contributing valuable input during the design stage of this study. The collective experience, insight, and local knowledge provided by CEA staff improved the overall quality of the research presented here.

DISCLAIMER The statements and conclusions in this report are those of the authors (Dr. Timothy McLarney and Richard Sarles) at True North Research, Inc. and not necessarily those of Clean Energy Alliance. Any errors and omissions are the responsibility of the authors.

ABOUT TRUE NORTH True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, perceptions, priorities, and concerns of their residents and customers. Through designing and implementing scientific surveys, focus groups, and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, establishing fiscal priorities, passing revenue measures, and developing effective public information campaigns. During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 1,500 survey research studies for public agencies—including more than 100 studies for public utilities in California.

KEY FINDINGS

As noted in the *Introduction*, this study was designed to provide CEA with a statistically reliable understanding of customers' awareness, opinions, priorities, and behaviors with respect to energy-related issues, initiatives, and programs. Whereas subsequent sections of this report are devoted to conveying the detailed results of the survey, in this section we attempt to 'see the forest through the trees' and note how the collective results of the survey answer some of the key questions that motivated the research.

What issues are most importance to CEA customers?

CEA customers are sensitive to issues of cost and affordability. Although this could partially be a reflection of the current economic climate and uncertainty related to tariffs, it is clear that issues of cost and affordability factor prominently among customers' concerns and motivations.

When asked in an *open-ended* manner to identify the most important issue or challenge facing their community today, customers were most apt to cite the high cost of living/affordability (20%), high cost of electricity (11%), government/political issues (9%), high utility rates in general (5%), housing availability/affordability (4%), and climate change/environmental issues (4%). Consistent with their open-ended responses, customers ranked cost-related issues as the most concerning when offered a specific list of issues, including cost of living in general (91% very or somewhat concerned), cost of electricity (90%), and paying for essentials like food, gas, and electricity (82%). Addressing homelessness (75%), protecting the environment (75%), and traffic congestion (74%) were at least somewhat concerning to three-quarters of respondents, whereas two-thirds rated air pollution (70%), climate change (69%), and greenhouse gas emissions (66%) as very or somewhat concerning.

When their focus was narrowed to energy-related issues, reducing their home's/business's energy costs was rated as the most important energy issue (81% extremely or very important), followed by having cleaner air to breathe in their home/building (77%), avoiding power outages at their home/business (75%), and receiving a discount on their energy bill if they use less energy during peak periods (69%). Issues that didn't tie directly back to a respondent's home or business were rated as somewhat less important, including generating more electricity locally through rooftop solar and other small installations (65%), addressing climate change by reducing greenhouse gas emissions (64%), ensuring that low-income households and underserved populations have the same opportunities to transition to clean energy (63%), and creating good-paying jobs in the energy sector (52%). For more on this topic see *Importance of Issues/Initiatives* on page 6.

How do CEA customers prioritize energy actions and initiatives?

Although CEA customers are generally supportive of most actions and initiatives that can be taken to produce cleaner, greener energy and improve the reliability of North County's energy supplies, they tend to prioritize initiatives that provide *broad benefits* as opposed to those that have more targeted benefits or involve new regulations/requirements. Among the 13 actions tested, customers assigned the highest priority to upgrading the electric grid and infrastructure including undergrounding utility wires, expanding grid capacity, and replacing outdated equipment (86% high or medium priority), followed by improving the energy efficiency of buildings so they use less energy and have lower energy bills (83%), creating more back-up power systems that can operate during a power outage (80%), installing more small-scale renewable energy systems like solar on home rooftops and parking lots (77%), and providing job training and certification programs to fill the need for skilled workers in the clean energy sector (76%).

At the other end of the spectrum, CEA customers were less inclined to prioritize requiring all new construction to be all-electric to improve indoor air quality (46%), increasing the number of public access charging stations for electric vehicles (52%), increasing the number of electric cars, trucks, and buses to reduce greenhouse gas emissions and air pollution (57%), and improving access to technical experts who can advise on energy saving projects in the home/for businesses (58%). For more on this topic see *Priority Energy Initiatives & Actions* on page 12.

To what extent have CEA customers made energy improvements to their homes/businesses?

Most CEA customers have made *modest* energy-related improvements to their homes/businesses, with the most common being the use of energy efficient lighting (78%) and weatherization improvements such as improved insulation, windows, and/or roof (55%). Approximately four-in-ten customers also indicated their home/building has solar panels (44%) and a smart home energy/building management system that monitors and controls heating/air conditioning, lighting and appliances to optimize performance and reduce energy use (43%). All remaining improvements tested in the survey were far less common, including an electric stove (26%), electric heat pump water heater (22%), EV charging station (21%), electric furnace (20%), and back-up battery storage (18%). For more on this topic see *Energy Improvements at Home/Business* on page 17.

Are CEA customers aware of available energy-related programs and services?

Despite most CEA customers initially describing themselves as well-informed (15%) or somewhat informed (38%) about the programs and services that are available to help residents/businesses with energy-related improvements, only a few programs enjoy widespread awareness: discounted rates for energy used during off-peak hours (79% aware), discounted rates for low-income households (67%), and rebates/incentives to install solar panels and battery storage (61%).

Less than half of CEA customers indicated they were aware of the remaining programs prior to taking the survey, including rebates/incentives to make energy-efficiency improvements to your home/business, such as improved insulation and windows (46%) and to install energy efficient lighting, appliances, and equipment (44%), discounted rates for those who have medical equipment in their home (44%), and free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills (44%). When compared to the other programs tested, CEA customers were substantially less aware of rebates/incentives to install electric vehicle charging equipment (35%), rebates and incentives to replace gas appliances and equipment with electric appliances and equipment (31%), and programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere (23%). For more on this topic see *Awareness of Specific Programs* on page 21.

How interested are CEA customers in participating in energy-related programs?

Energy-related programs that have broad application tend to find the most interest among CEA customers, especially rebates and incentives to install energy efficient lighting, appliances, and equipment (64% very or somewhat interested), discounted rates for energy used during off-peak hours (61%), and rebates and incentives to make energy-efficient improvements to their home/business's building, such as improved insulation and windows (61%). Free energy audits and technical assistance on how to improve their household's/business's energy efficiency and lower bills (55%) and rebates and incentives to install solar panels and batter storage (48%) were also popular with many customers.

At the other end of the spectrum, programs that had a narrow target audience or purpose tended to garner less interest, including discounted rates for those who have medical equipment in their home (26%), rebates and incentives to install electric vehicle charging equipment (31%), and discounted rates for low-income households (35%). For more on this topic see *Interest in Programs* on page 25.

What are the best methods for communicating with CEA customers?

The vast majority of respondents (78%) who participated in the survey were aware of their status as a CEA customer prior to taking the survey. When asked to rate various ways CEA could communicate with them, customers identified email (79% very or somewhat effective), the Clean Energy Alliance website (73%), direct mail (69%), electronic newsletters (68%), and utility bill inserts (66%) as the most effective methods. That said, preferred communication methods varied considerably across subgroups, with pronounced differences based on respondent age, income, and ethnicity. For more on this topic see *Communication* on page 30.

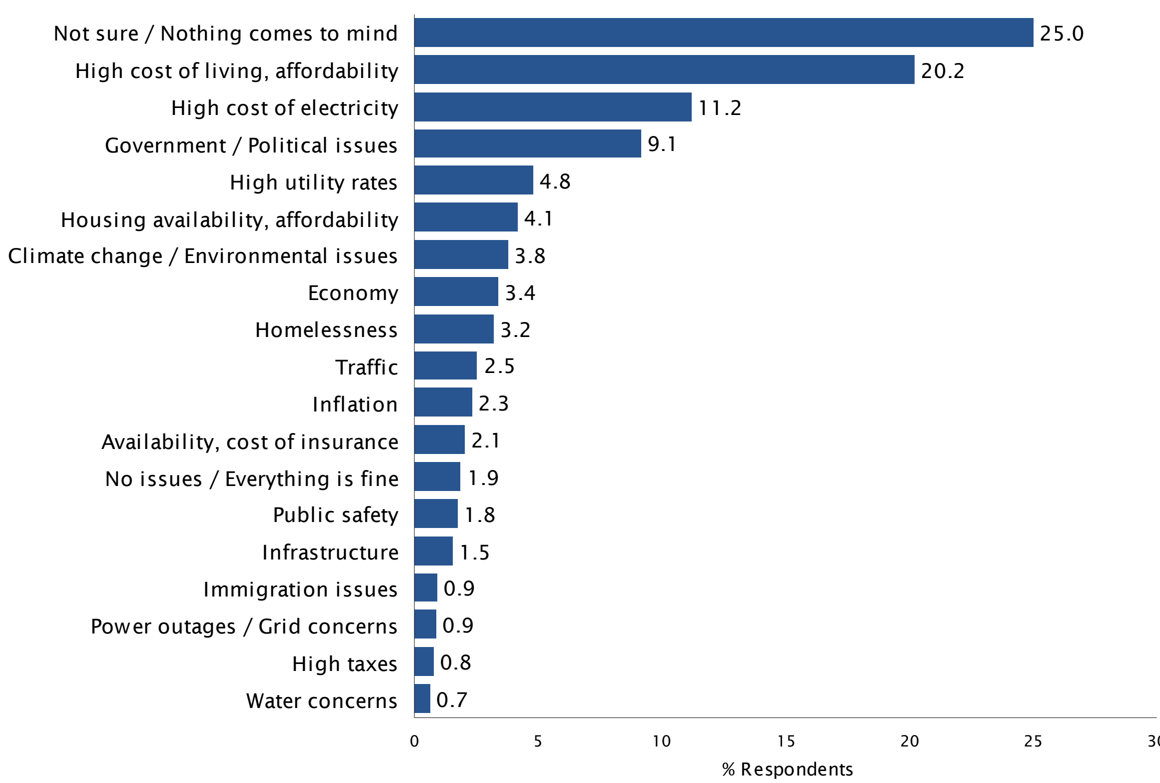
Importance of Issues/Initiatives

The opening section of the survey profiled customers' opinions regarding the most important issues or challenges facing their community *in general*, the relative importance of various energy-related issues/objectives, and how they would prioritize among a series of energy-related initiatives for their community.

MOST IMPORTANT ISSUE OR CHALLENGE The first question in this series asked customers to identify the most important issue or challenge facing their community today. Question 1 was presented in an open-ended manner, thereby allowing respondents to mention any issue or challenge that came to mind without being prompted by or constrained to a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 1 below.

Question 1 *To begin, what would you say is the most important issue or challenge facing your community today?*

FIGURE 1 MOST IMPORTANT ISSUE FACING COMMUNITY

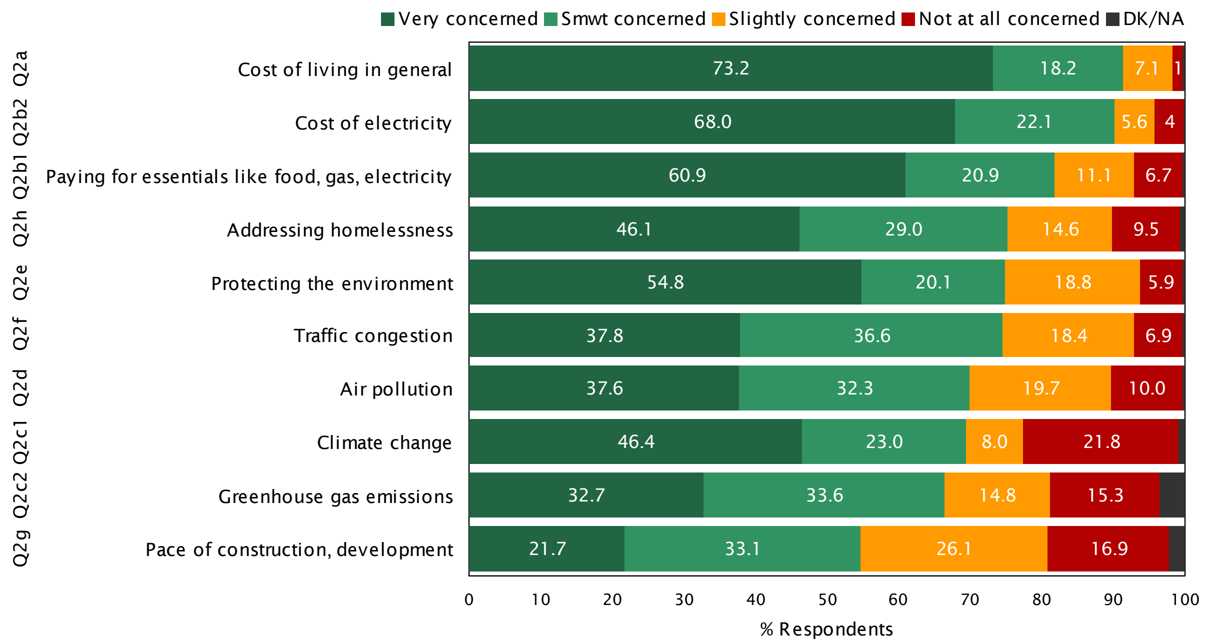


One-in-four respondents (25%) were unsure or could not think of any important issues or challenges facing their community. Among the specific responses, issues of cost and affordability dominated the top mentions. Overall, customers were most apt to cite the high cost of living/affordability (20%), high cost of electricity (11%), government/political issues (9%), high utility rates in general (5%), housing availability/affordability (4%), and climate change/environmental issues (4%) as the most important issue or challenge facing their community.

RANKING OF ISSUES Whereas Question 1 was administered in an open-ended manner to capture customers' top-of-mind response, Question 2 presented respondents with the list of issues shown in Figure 2 and asked customers to describe the extent to which they are concerned about each issue. Consistent with their open-ended responses, customers ranked cost-related issues as the most concerning, including cost of living in general (91% very or somewhat concerned), cost of electricity (90%), and paying for essentials like food, gas, and electricity (82%). Addressing homelessness (75%), protecting the environment (75%), and traffic congestion (74%) were at least somewhat concerning to three-quarters of respondents, whereas two-thirds rated air pollution (70%), climate change (69%), and greenhouse gas emissions (66%) as very or somewhat concerning. When compared to the other issues tested, CEA customers were less concerned about the pace of construction and development (55%).

Question 2 *Next, I'm going to read a list of specific issues. For each one, please tell me how concerned you are about the issue.*

FIGURE 2 RANKING ISSUES OF CONCERN



For the interested reader, tables 1-6 display the percentage of customers who expressed being *very* concerned with an issue according to customer age, location, home type, home ownership, household income, ethnicity, customer type, gender, CARE status, and whether they have rooftop solar.[1] To ease comparisons, the top three issues within each subgroup are highlighted in green. With few exceptions, cost of living in general and cost of electricity were among the top three most concerning issues across CEA customer subgroups.

1. Demographic subgroups (age, ethnicity, home ownership, etc.) were constructed for residential customers only. CARE and Rooftop solar status was classified based on information in the customer database provided by CEA.

Table 1 Issues of Concern by Age (Showing % Very Concerned)

	Age (QD1)			
	Under 45	45 to 54	55 to 64	65 or older
Cost of living in general	84.6	89.8	67.0	63.2
Cost of electricity	63.5	87.7	60.3	69.6
Paying for essentials like food, gas, and electricity	68.8	74.1	56.4	57.4
Protecting the environment	52.1	57.7	50.7	64.4
Climate change	44.8	39.1	45.3	60.7
Addressing homelessness	33.1	61.9	35.6	48.4
Traffic congestion	25.0	42.0	30.1	38.3
Air pollution	21.7	23.1	39.4	50.9
Greenhouse gas emissions	25.1	15.6	50.7	43.4
The pace of construction and development	12.7	22.0	19.1	21.1

Table 2 Issues of Concern by Customer City (Showing % Very Concerned)

	Customer City					
	Carlsbad	Escondido	Oceanside	San Marcos	Solana Beach / Del Mar	Vista
Cost of living in general	65.8	67.3	74.6	70.6	55.1	93.2
Cost of electricity	68.7	82.2	56.2	58.0	55.6	77.4
Paying for essentials like food, gas, and electricity	53.8	51.8	69.2	59.3	30.3	73.1
Protecting the environment	63.8	39.7	56.5	55.3	69.8	57.3
Climate change	56.4	49.1	33.9	47.9	70.8	47.9
Addressing homelessness	44.2	48.0	41.1	44.3	54.4	53.5
Traffic congestion	38.6	27.3	35.2	42.9	27.4	52.5
Air pollution	45.3	32.0	30.4	39.8	34.1	46.7
Greenhouse gas emissions	53.8	23.8	24.1	25.3	59.2	37.8
The pace of construction and development	20.5	19.8	21.0	25.8	13.3	24.6

Table 3 Issues of Concern by Home Type & Ownership Status (Showing % Very Concerned)

	Home Type (Q8)				Ownership Status (QD2)	
	Single family	Apartment	Condo/ Townhome	Mobile home	Own	Rent
Cost of living in general	68.1	83.0	85.7	92.2	70.9	80.6
Cost of electricity	63.6	63.4	78.3	87.1	64.2	76.5
Paying for essentials like food, gas, and electricity	58.5	70.4	72.8	79.3	61.3	64.2
Protecting the environment	52.4	65.3	57.0	56.8	54.8	58.6
Climate change	42.1	62.3	50.5	56.2	44.4	51.9
Addressing homelessness	43.6	51.8	40.1	62.6	43.1	52.2
Traffic congestion	39.5	39.7	30.0	17.1	38.2	36.3
Air pollution	36.9	34.1	35.2	49.0	40.9	32.1
Greenhouse gas emissions	35.6	27.2	25.4	40.7	35.9	28.1
The pace of construction and development	20.0	23.4	27.6	16.4	20.4	24.5

Table 4 Issues of Concern by Household Income (Showing % Very Concerned)

	Household Income (QD5)				
	<$50K	$50K to <$99K	$100K to <$149K	$150K to <$199K	$200K+
Cost of living in general	82.2	81.7	70.7	61.8	69.5
Cost of electricity	93.4	67.5	60.9	52.3	53.4
Paying for essentials like food, gas, and electricity	70.6	72.3	59.7	72.4	54.4
Protecting the environment	60.1	63.1	51.3	63.8	39.5
Climate change	51.2	48.5	47.5	57.2	38.6
Addressing homelessness	61.2	41.2	30.5	34.7	39.9
Traffic congestion	50.8	38.8	18.3	31.6	32.9
Air pollution	42.9	42.0	25.2	33.1	33.7
Greenhouse gas emissions	30.6	34.2	20.4	39.9	28.2
The pace of construction and development	26.3	15.7	19.1	25.4	15.4

Table 5 Issues of Concern by Ethnicity & Customer Type (Showing % Very Concerned)

	Ethnicity (QD4)				Customer Type	
	Asian American	Caucasian / White	Latino / Hispanic	Mixed / Other	Residential	Commercial
Cost of living in general	80.5	65.8	86.5	81.2	74.4	64.9
Cost of electricity	65.9	62.1	75.6	83.6	66.9	74.8
Paying for essentials like food, gas, and electricity	68.3	48.5	78.0	83.2	63.4	42.5
Protecting the environment	48.4	53.9	62.7	57.9	55.1	52.6
Climate change	41.1	52.5	45.6	60.4	47.6	37.8
Addressing homelessness	39.9	43.7	52.0	50.3	45.3	51.8
Traffic congestion	40.7	35.6	40.8	44.7	37.5	40.3
Air pollution	56.4	37.3	34.4	33.2	36.9	42.7
Greenhouse gas emissions	52.3	40.6	12.4	26.6	31.6	40.0
The pace of construction and development	12.1	27.5	12.2	34.8	21.5	22.7

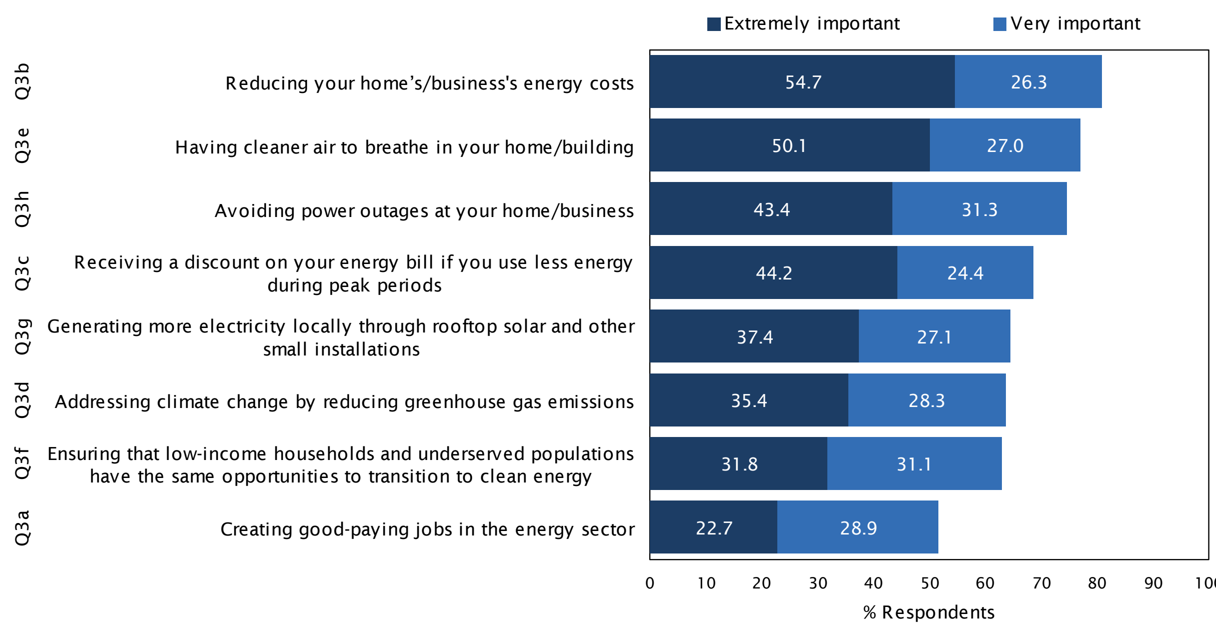
Table 6 Issues of Concern by Gender, CARE Customer in Database & Rooftop Solar Customer in Database (Showing % Very Concerned)

	Gender (QD3)		CARE Customer in Database		Rooftop Solar Customer in Database	
	Male	Female	Yes	No	Yes	No
Cost of living in general	72.5	76.0	87.4	69.0	70.1	74.6
Cost of electricity	64.5	68.3	74.8	66.3	59.6	72.2
Paying for essentials like food, gas, and electricity	67.8	58.1	72.9	56.9	59.1	61.7
Protecting the environment	50.4	58.2	59.2	53.5	60.4	52.2
Climate change	45.0	50.2	38.8	48.3	52.8	43.2
Addressing homelessness	43.2	48.7	56.7	43.0	49.4	44.6
Traffic congestion	38.4	36.2	44.4	35.9	45.6	34.3
Air pollution	37.5	37.5	33.4	38.9	43.6	34.9
Greenhouse gas emissions	36.2	26.3	27.8	34.4	39.5	30.0
The pace of construction and development	16.8	26.1	21.6	21.7	20.2	22.3

IMPORTANCE OF ENERGY ISSUES & OBJECTIVES Question 3 next narrowed customers' focus to the topic of energy, asking that they rate the importance of each energy issue or objective shown in Figure 3 to them/their business.

Question 3 *Turning now to the topic of energy, I'm going to read a list of specific issues. For each one, please tell me how important this issue is to you/your business.*

Figure 3 Importance of Energy Issues



Among the issues tested, reducing their home's/business's energy costs was rated as the most important energy issue (81% extremely or very important), followed by having cleaner air to breathe in their home/building (77%), avoiding power outages at their home/business (75%), and receiving a discount on their energy bill if they use less energy during peak periods (69%). Issues that didn't tie directly back to a respondent's home or business were rated as somewhat less important, including generating more electricity locally through rooftop solar and other small installations (65%), addressing climate change by reducing greenhouse gas emissions (64%), ensuring that low-income households and underserved populations have the same opportunities to transition to clean energy (63%), and creating good-paying jobs in the energy sector (52%).

Tables 7-12 show how the percentage rating each issue as extremely or very important varied across CEA customer subgroups, with the top three issues in each subgroup highlighted green to ease comparisons.

TABLE 7 IMPORTANCE OF ENERGY ISSUES BY AGE (SHOWING % EXTREMELY & VERY IMPORTANT)

	Age (QD1)			
	Under 45	45 to 54	55 to 64	65 or older
Reducing your home's/business's energy costs	93.2	98.4	78.4	77.4
Having cleaner air to breathe in your home/building	84.0	82.9	71.9	85.8
Avoiding power outages at your home/business	79.7	71.6	71.2	77.0
Receiving a discount on your energy bill if you use less energy during peak periods	85.7	91.8	68.2	69.8
Generating more electricity locally through rooftop solar and other small installations	67.7	71.6	70.8	68.7
Addressing climate change by reducing greenhouse gas emissions	59.1	74.2	70.9	73.1
Ensuring that low-income hslds, underserved populations have same opportunities to transition to clean energy	81.9	66.0	54.6	71.1
Creating good-paying jobs in the energy sector	53.5	69.3	49.2	53.5

TABLE 8 IMPORTANCE OF ENERGY ISSUES BY CUSTOMER CITY (SHOWING % EXTREMELY & VERY IMPORTANT)

	Customer City					
	Carlsbad	Escondido	Oceanside	San Marcos	Solana Beach / Del Mar	Vista
Reducing your home's/business's energy costs	84.0	83.7	77.6	78.9	64.4	85.1
Having cleaner air to breathe in your home/building	78.8	76.0	72.8	67.0	83.0	91.0
Avoiding power outages at your home/business	82.3	70.9	75.4	69.3	84.5	72.5
Receiving a discount on your energy bill if you use less energy during peak periods	70.8	68.2	71.3	60.7	60.6	71.6
Generating more electricity locally through rooftop solar and other small installations	67.7	63.8	65.7	64.7	68.3	59.1
Addressing climate change by reducing greenhouse gas emissions	67.2	59.6	62.4	54.6	68.3	74.4
Ensuring that low-income hslds, underserved populations have same opportunities to transition to clean energy	58.2	66.3	65.8	54.0	45.8	71.4
Creating good-paying jobs in the energy sector	54.8	43.9	55.1	48.5	56.0	54.0

Table 9 Importance of Energy Issues by Home Type & Ownership Status (Showing % Extremely & Very Important)

	Home Type (Q8)				Ownership Status (QD2)	
	Single family	Apartment	Condo/ Townhome	Mobile home	Own	Rent
Reducing your home's/business's energy costs	77.9	90.0	90.1	92.2	79.4	86.6
Having cleaner air to breathe in your home/building	76.8	84.2	84.3	82.5	76.6	81.1
Avoiding power outages at your home/business	77.6	62.9	81.7	48.6	77.5	72.1
Receiving a discount on your energy bill if you use less energy during peak periods	67.6	76.4	75.4	88.3	68.6	72.2
Generating more electricity locally through rooftop solar and other small installations	70.1	61.3	58.6	75.0	65.2	64.4
Addressing climate change by reducing greenhouse gas emissions	60.6	81.9	64.7	77.8	61.7	68.6
Ensuring that low-income hslds, underserved populations have same opportunities to transition to clean energy	57.6	85.5	68.8	80.5	61.8	70.5
Creating good-paying jobs in the energy sector	45.4	58.6	66.4	64.7	50.3	55.6

Table 10 Importance of Energy Issues by Household Income (Showing % Extremely & Very Important)

	Household Income (QD5)				
	<$50K	$50K to <$99K	$100K to <$149K	$150K to <$199K	$200K+
Reducing your home's/business's energy costs	95.4	90.3	79.2	88.9	77.6
Having cleaner air to breathe in your home/building	88.5	86.9	76.1	83.7	66.4
Avoiding power outages at your home/business	73.1	87.0	63.6	88.5	68.1
Receiving a discount on your energy bill if you use less energy during peak periods	86.3	77.2	69.4	72.9	54.7
Generating more electricity locally through rooftop solar and other small installations	72.1	71.8	58.3	70.3	62.5
Addressing climate change by reducing greenhouse gas emissions	73.7	68.5	63.2	72.4	52.0
Ensuring that low-income hslds, underserved populations have same opportunities to transition to clean energy	86.0	75.3	64.1	64.1	45.2
Creating good-paying jobs in the energy sector	56.0	72.0	39.9	56.9	36.4

Table 11 Importance of Energy Issues by Ethnicity & Customer Type (Showing % Extremely & Very Important)

	Ethnicity (QD4)				Customer Type	
	Asian American	Caucasian / White	Latino / Hispanic	Mixed / Other	Residential	Commercial
Reducing your home's/business's energy costs	74.3	78.8	90.6	97.5	82.6	69.5
Having cleaner air to breathe in your home/building	82.4	76.3	83.9	87.2	79.2	61.8
Avoiding power outages at your home/business	82.4	79.1	68.2	84.5	74.5	76.3
Receiving a discount on your energy bill if you use less energy during peak periods	75.7	63.7	87.6	86.8	71.2	50.8
Generating more electricity locally through rooftop solar and other small installations	66.9	69.7	68.0	56.5	66.3	52.5
Addressing climate change by reducing greenhouse gas emissions	67.1	67.1	68.5	64.1	65.6	50.3
Ensuring that low-income hslds, underserved populations have same opportunities to transition to clean energy	70.4	60.9	81.2	68.0	65.2	47.2
Creating good-paying jobs in the energy sector	45.7	50.4	59.1	64.1	52.6	44.7

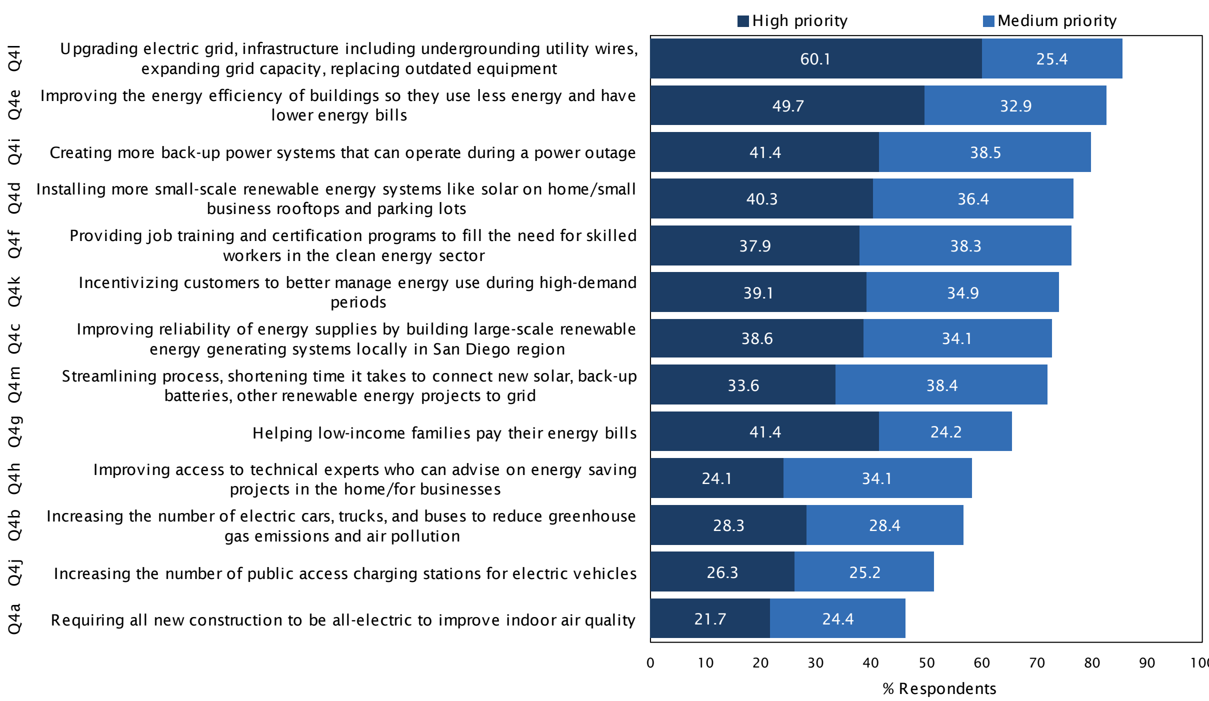
Table 12 Importance of Energy Issues by Gender, CARE Customer in Database & Rooftop Solar Customer in Database (Showing % Extremely & Very Important)

	Gender (QD3)		CARE Customer in Database		Rooftop Solar Customer in Database	
	Male	Female	Yes	No	Yes	No
Reducing your home's/business's energy costs	81.5	84.4	91.0	78.0	76.5	83.0
Having cleaner air to breathe in your home/building	81.9	76.7	85.4	74.6	75.4	77.8
Avoiding power outages at your home/business	73.0	76.3	74.7	74.7	78.3	73.0
Receiving a discount on your energy bill if you use less energy during peak periods	68.4	76.3	82.4	64.6	70.0	68.0
Generating more electricity locally through rooftop solar and other small installations	68.2	65.4	62.4	65.2	80.6	57.2
Addressing climate change by reducing greenhouse gas emissions	62.6	67.8	69.4	62.0	68.7	61.4
Ensuring that low-income hslds, underserved populations have same opportunities to transition to clean energy	60.6	71.9	83.9	56.7	60.3	64.1
Creating good-paying jobs in the energy sector	45.7	61.7	65.4	47.5	52.6	51.1

PRIORITY ENERGY INITIATIVES & ACTIONS Having measured how CEA customers rank specific energy issues, Question 4 transitioned to a list of initiatives and actions that could be taken in the future. For each of the actions shown in Figure 4, customers were asked to identify whether the action should be a high, medium, or low priority for their community—or if they think the action should not be taken.

Question 4 *Next, I'm going to read a short list of actions that could be taken in the future. As I read each item, please indicate whether you think it should be a high priority, medium priority, or low priority for your community. If you think the action shouldn't be taken, please indicate so. Also, please keep in mind that not all items can be high priorities.*

Figure 4 Priority Energy Actions



At the top of the list, customers assigned the highest priority to upgrading the electric grid and infrastructure including undergrounding utility wires, expanding grid capacity, and replacing outdated equipment (86% high or medium priority), followed by improving the energy efficiency of buildings so they use less energy and have lower energy bills (83%), creating more back-up power systems that can operate during a power outage (80%), installing more small-scale renewable energy systems like solar on home rooftops and parking lots (77%), and providing job training and certification programs to fill the need for skilled workers in the clean energy sector (76%).

At the other end of the spectrum, CEA customers were less inclined to prioritize requiring all new construction to be all-electric to improve indoor air quality (46%), increasing the number of public access charging stations for electric vehicles (52%), increasing the number of electric cars, trucks, and buses to reduce greenhouse gas emissions and air pollution (57%), and improving access to technical experts who can advise on energy saving projects in the home/for businesses (58%).

For the interested reader, tables 13-18 show how the percentage of respondents who rated each as a high or medium priority varied across CEA customer subgroups, with the top five priorities highlighted in green within each subgroup.

TABLE 13 PRIORITY ENERGY ACTIONS BY AGE (SHOWING % HIGH OR MEDIUM PRIORITY)

	Age (QD1)			
	Under 45	45 to 54	55 to 64	65 or older
Upgrading electric grid, infrastructure including undergrounding utility wires, expanding grid capacity, replacing outdated equipment	72.8	88.7	90.6	89.8
Improving the energy efficiency of buildings so they use less energy and have lower energy bills	85.7	81.3	81.7	90.8
Creating more back-up power systems that can operate during a power outage	80.7	80.1	80.1	82.2
Installing more small-scale renewable energy systems like solar on home/small business rooftops and parking lots	72.1	87.3	84.2	77.8
Providing job training and certification programs to fill the need for skilled workers in the clean energy sector	77.4	79.5	78.7	83.2
Incentivizing customers to better manage energy use during high-demand periods	75.9	84.7	79.5	81.8
Improving reliability of energy supplies by building large-scale renewable energy generating systems locally in San Diego region	70.9	85.1	77.7	74.4
Streamlining process, shortening time it takes to connect new solar, back-up batteries, other renewable energy projects to grid	61.9	81.5	87.6	74.3
Helping low-income families pay their energy bills	76.0	53.4	68.5	76.7
Improving access to technical experts who can advise on energy saving projects in the home/for businesses	61.4	64.1	58.8	65.6
Increasing the number of electric cars, trucks, and buses to reduce greenhouse gas emissions and air pollution	57.3	59.6	60.0	65.4
Increasing the number of public access charging stations for electric vehicles	42.6	57.8	50.9	58.9
Requiring all new construction to be all-electric to improve indoor air quality	57.3	44.5	43.3	52.2

Table 14 Priority Energy Actions by Customer City (Showing % High or Medium Priority)

	Customer City: Carlsbad	Escondido	Oceanside	San Marcos	Solana Beach / Del Mar	Vista
Upgrading electric grid, infrastructure including undergrounding utility wires, expanding grid capacity, replacing outdated equipment	91.7	89.5	82.7	83.4	93.9	77.8
Improving the energy efficiency of buildings so they use less energy and have lower energy bills	84.4	82.6	83.2	74.9	95.4	83.9
Creating more back-up power systems that can operate during a power outage	89.7	85.1	74.4	69.4	86.9	78.7
Installing more small-scale renewable energy systems like solar on home/small business rooftops and parking lots	78.0	81.6	77.6	75.6	83.9	67.0
Providing job training and certification programs to fill the need for skilled workers in the clean energy sector	80.3	76.4	77.8	69.7	62.0	78.1
Incentivizing customers to better manage energy use during high-demand periods	79.9	72.2	75.4	64.5	82.1	74.7
Improving reliability of energy supplies by building large-scale renewable energy generating systems locally in San Diego region	90.2	70.1	62.0	76.1	76.8	68.8
Streamlining process, shortening time it takes to connect new solar, back-up batteries, other renewable energy projects to grid	80.5	69.1	71.7	66.4	66.6	72.8
Helping low-income families pay their energy bills	76.7	65.6	58.1	50.4	69.1	77.6
Improving access to technical experts who can advise on energy saving projects in the home/for businesses	62.2	60.2	55.4	47.6	72.2	62.0
Increasing the number of electric cars, trucks, and buses to reduce greenhouse gas emissions and air pollution	69.1	49.0	51.6	54.9	70.6	58.7
Increasing the number of public access charging stations for electric vehicles	58.0	46.9	50.6	47.6	58.9	53.0
Requiring all new construction to be all-electric to improve indoor air quality	49.8	46.4	45.2	37.8	54.2	48.8

Table 15 Priority Energy Actions by Home Type & Ownership Status (Showing % High or Medium Priority)

	Home Type (Q8)				Ownership Status (QD2)	
	Single family	Apartment	Condo/ Townhome	Mobile home	Own	Rent
Upgrading electric grid, infrastructure including undergrounding utility wires, expanding grid capacity, replacing outdated equipment	90.7	64.4	86.6	100.0	91.0	76.9
Improving the energy efficiency of buildings so they use less energy and have lower energy bills	81.2	86.3	88.3	92.2	82.6	84.6
Creating more back-up power systems that can operate during a power outage	77.9	77.4	85.2	91.4	81.6	79.8
Installing more small-scale renewable energy systems like solar on home/small business rooftops and parking lots	77.8	67.1	75.8	92.2	79.2	72.6
Providing job training and certification programs to fill the need for skilled workers in the clean energy sector	77.5	74.4	78.6	88.3	79.0	71.2
Incentivizing customers to better manage energy use during high-demand periods	73.1	77.2	80.3	81.0	75.4	72.9
Improving reliability of energy supplies by building large-scale renewable energy generating systems locally in San Diego region	71.4	72.0	74.1	74.7	72.0	75.5
Streamlining process, shortening time it takes to connect new solar, back-up batteries, other renewable energy projects to grid	76.6	59.3	64.5	87.5	75.9	64.9
Helping low-income families pay their energy bills	57.4	87.4	68.9	93.0	63.1	74.0
Improving access to technical experts who can advise on energy saving projects in the home/for businesses	54.9	58.0	62.3	80.5	59.7	57.4
Increasing the number of electric cars, trucks, and buses to reduce greenhouse gas emissions and air pollution	59.0	55.6	53.2	70.1	59.7	52.8
Increasing the number of public access charging stations for electric vehicles	51.6	46.0	53.7	71.9	54.6	45.6
Requiring all new construction to be all-electric to improve indoor air quality	40.9	65.2	41.5	57.6	43.3	54.4

Table 16 Priority Energy Actions by Household Income (Showing % High or Medium Priority)

	Household Income (QD5) <$50K	$50K to <$99K	$100K to <$149K	$150K to <$199K	$200K+
Upgrading electric grid, infrastructure including undergrounding utility wires, expanding grid capacity, replacing outdated equipment	77.7	81.8	88.5	93.4	91.3
Improving the energy efficiency of buildings so they use less energy and have lower energy bills	84.9	82.4	87.0	82.5	77.8
Creating more back-up power systems that can operate during a power outage	81.0	72.3	82.8	91.2	74.0
Installing more small-scale renewable energy systems like solar on home/small business rooftops and parking lots	80.5	73.8	74.4	88.5	62.5
Providing job training and certification programs to fill the need for skilled workers in the clean energy sector	81.4	79.4	75.2	76.8	67.3
Incentivizing customers to better manage energy use during high-demand periods	82.6	73.8	77.5	81.5	75.1
Improving reliability of energy supplies by building large-scale renewable energy generating systems locally in San Diego region	72.3	73.0	69.3	80.2	77.1
Streamlining process, shortening time it takes to connect new solar, back-up batteries, other renewable energy projects to grid	66.3	67.2	74.0	87.9	77.4
Helping low-income families pay their energy bills	82.4	64.0	67.1	68.2	49.9
Improving access to technical experts who can advise on energy saving projects in the home/for businesses	79.1	53.2	56.2	56.4	39.8
Increasing the number of electric cars, trucks, and buses to reduce greenhouse gas emissions and air pollution	58.1	53.9	53.4	69.1	62.8
Increasing the number of public access charging stations for electric vehicles	50.3	42.5	54.0	65.7	57.9
Requiring all new construction to be all-electric to improve indoor air quality	64.1	45.2	47.4	45.5	28.3

Table 17 Priority Energy Actions by Ethnicity & Customer Type (Showing % High or Medium Priority)

	Ethnicity (QD4) Asian American	Caucasian / White	Latino / Hispanic	Mixed / Other	Customer Type Residential	Commercial
Upgrading electric grid, infrastructure including undergrounding utility wires, expanding grid capacity, replacing outdated equipment	86.9	91.7	76.2	89.7	85.0	88.6
Improving the energy efficiency of buildings so they use less energy and have lower energy bills	91.5	84.6	85.6	81.2	83.6	76.2
Creating more back-up power systems that can operate during a power outage	82.9	82.9	78.6	82.9	79.5	82.6
Installing more small-scale renewable energy systems like solar on home/small business rooftops and parking lots	67.7	80.5	73.5	69.9	76.1	81.1
Providing job training and certification programs to fill the need for skilled workers in the clean energy sector	74.1	76.3	82.5	86.4	77.6	66.6
Incentivizing customers to better manage energy use during high-demand periods	83.7	79.1	79.4	67.2	75.2	66.2
Improving reliability of energy supplies by building large-scale renewable energy generating systems locally in San Diego region	86.9	76.5	68.8	79.6	72.2	76.0
Streamlining process, shortening time it takes to connect new solar, back-up batteries, other renewable energy projects to grid	75.7	77.4	67.2	66.6	71.7	73.9
Helping low-income families pay their energy bills	59.3	66.8	74.4	59.6	66.3	60.4
Improving access to technical experts who can advise on energy saving projects in the home/for businesses	54.6	57.2	67.4	50.1	57.7	61.6
Increasing the number of electric cars, trucks, and buses to reduce greenhouse gas emissions and air pollution	56.7	60.9	62.4	50.1	57.3	52.0
Increasing the number of public access charging stations for electric vehicles	52.4	55.0	56.4	27.8	51.6	50.7
Requiring all new construction to be all-electric to improve indoor air quality	46.0	46.7	53.1	51.9	45.9	47.6

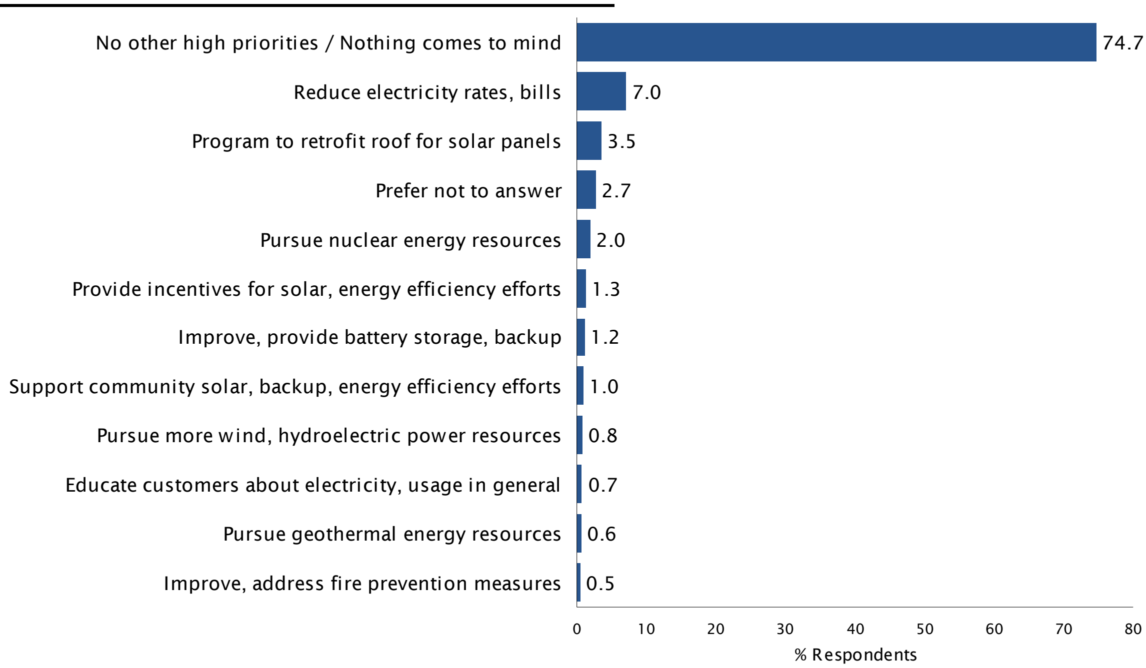
TABLE 18 PRIORITY ENERGY ACTIONS BY GENDER, CARE CUSTOMER IN DATABASE & ROOFTOP SOLAR CUSTOMER IN DATABASE (SHOWING % HIGH OR MEDIUM PRIORITY)

	Gender (QD3)		CARE Customer in Database		Rooftop Solar Customer in Database	
	Male	Female	Yes	No	Yes	No
Upgrading electric grid, infrastructure including undergrounding utility wires, expanding grid capacity, replacing outdated equipment	91.6	78.9	73.5	89.0	90.2	83.3
Improving the energy efficiency of buildings so they use less energy and have lower energy bills	84.9	82.2	77.8	84.1	81.7	83.1
Creating more back-up power systems that can operate during a power outage	79.9	79.3	80.5	79.7	80.3	79.7
Installing more small-scale renewable energy systems like solar on home/small business rooftops and parking lots	79.4	73.0	77.3	76.5	85.8	72.6
Providing job training and certification programs to fill the need for skilled workers in the clean energy sector	76.0	80.2	80.9	74.9	80.3	74.4
Incentivizing customers to better manage energy use during high-demand periods	80.1	73.7	76.3	73.4	76.4	73.0
Improving reliability of energy supplies by building large-scale renewable energy generating systems locally in San Diego region	79.8	62.9	68.6	73.8	75.4	71.4
Streamlining process, shortening time it takes to connect new solar, back-up batteries, other renewable energy projects to grid	76.6	66.9	67.4	73.3	80.8	67.9
Helping low-income families pay their energy bills	64.3	69.1	74.9	62.8	57.1	69.4
Improving access to technical experts who can advise on energy saving projects in the home/for businesses	58.2	60.2	65.8	56.0	57.9	58.4
Increasing the number of electric cars, trucks, and buses to reduce greenhouse gas emissions and air pollution	66.8	47.0	55.0	57.1	62.8	53.8
Increasing the number of public access charging stations for electric vehicles	58.6	42.1	55.7	50.2	58.4	48.3
Requiring all new construction to be all-electric to improve indoor air quality	50.9	40.8	46.6	46.0	47.7	45.4

Recognizing that the list of items in Question 4 was not exhaustive, Question 5 followed-up by providing respondents with the opportunity to identify any energy-related project or program not previously mentioned that they think should be a high priority for their community. Most respondents (75%) did not suggest an additional priority, while 7% mentioned reducing electricity rates/costs and 4% mentioned a program to retrofit roofs for solar panels.

Question 5 *Is there an energy-related project or program not previously mentioned that you think should be a high priority for your community?*

FIGURE 5 OTHER HIGH PRIORITY ENERGY-RELATED PROJECTS OR PROGRAMS



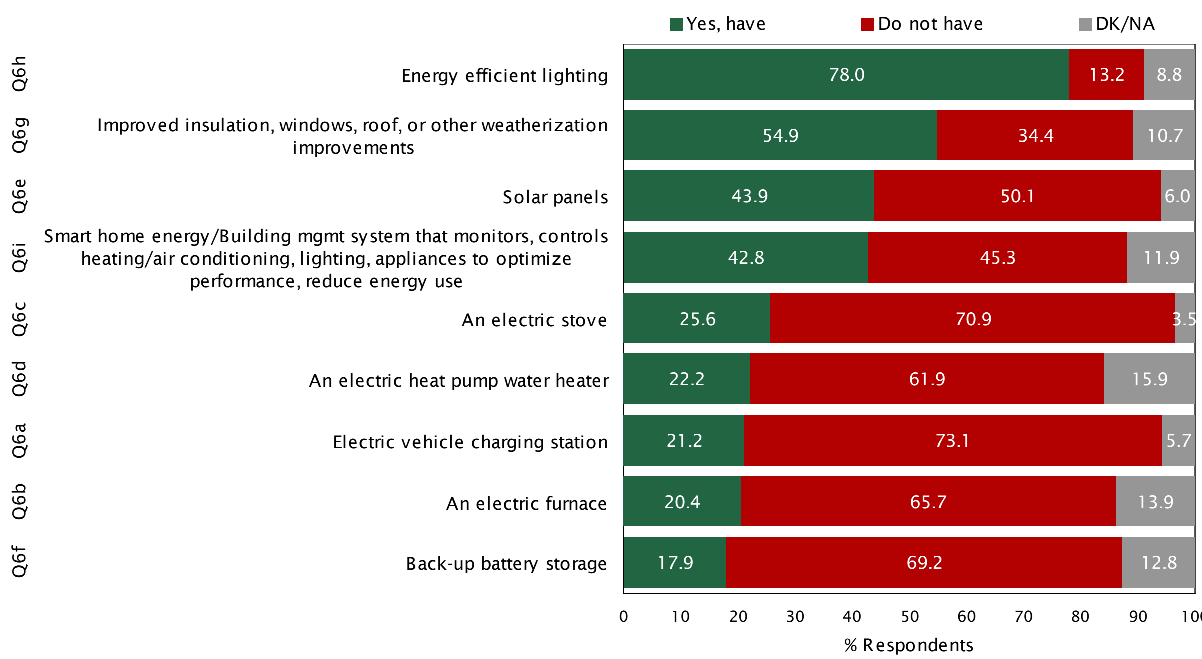
ENERGY IMPROVEMENTS & PROGRAMS

Having measured CEA customer's opinions and priorities with respect to energy issues and initiatives that can impact their community (see prior section), beginning with Question 6 the survey shifted focus to customer-specific topics—including the energy improvements they have made to their home/business building, their awareness of various energy-related programs, as well as their interest in said programs.

ENERGY IMPROVEMENTS AT HOME/BUSINESS The first question in this series simply asked respondents to identify the types of energy improvements that are present in their current home/business building. As shown in Figure 6 below, most customers reported their home/business uses energy efficient lighting (78%) and has weatherization improvements such as improved insulation, windows, and/or roof (55%). Approximately four-in-ten customers also indicated their home/building has solar panels (44%) and a smart home energy/building management system that monitors and controls heating/air conditioning, lighting and appliances to optimize performance and reduce energy use (43%). The remaining improvements were far less common, including an electric stove (26%), electric heat pump water heater (22%), EV charging station (21%), electric furnace (20%), and back-up battery storage (18%).

Question 6 *Next, I'm going to read a list of energy improvements that can be made to a home/building. For each, please say 'yes' if your current home/business' building has this improvement - 'no' if not.*

FIGURE 6 ENERGY IMPROVEMENTS AT HOME/BUSINESS



Tables 19-24 show how the presence of each improvement in their home/business varied across subgroups of CEA customers, with the top three most common improvements highlighted in green within each subgroup.

TABLE 19 ENERGY IMPROVEMENTS AT HOME/BUSINESS BY AGE (SHOWING % YES)

	Age (QD1)			
	Under 45	45 to 54	55 to 64	65 or older
Energy efficient lighting	72.8	89.5	86.7	83.6
Improved insulation, windows, roof, or other weatherization improvements	57.0	58.7	58.4	65.3
Solar panels	28.2	71.1	60.1	44.8
Smart home energy/Building mgmt system that monitors, controls heating/AC, lighting, appliances to optimize performance, reduce energy use	34.5	65.6	52.8	40.6
An electric stove	21.7	25.8	22.6	27.5
An electric heat pump water heater	17.9	27.7	19.6	18.5
Electric vehicle charging station	15.1	36.0	33.9	21.4
An electric furnace	12.8	26.1	25.2	18.1
Back-up battery storage	18.9	31.0	17.5	13.7

TABLE 20 ENERGY IMPROVEMENTS AT HOME/BUSINESS BY CUSTOMER CITY SHOWING % YES)

	Customer City					
	Carlsbad	Escondido	Oceanside	San Marcos	Solana Beach / Del Mar	Vista
Energy efficient lighting	80.2	74.4	75.6	74.6	84.4	85.7
Improved insulation, windows, roof, or other weatherization improvements	55.6	52.2	53.9	53.6	42.7	63.2
Solar panels	54.1	46.0	42.3	43.7	53.3	30.2
Smart home energy/Building mgmt system that monitors, controls heating/AC, lighting, appliances to optimize performance, reduce energy use	55.3	44.5	38.6	51.8	34.7	26.8
An electric stove	21.5	26.5	31.5	14.5	30.8	28.8
An electric heat pump water heater	24.1	15.6	20.1	11.3	28.7	40.4
Electric vehicle charging station	39.5	15.0	18.5	24.9	22.4	9.1
An electric furnace	22.5	18.3	24.2	15.1	40.3	14.7
Back-up battery storage	21.6	18.7	16.6	18.7	19.3	13.9

TABLE 21 ENERGY IMPROVEMENTS AT HOME/BUSINESS BY HOME TYPE & OWNERSHIP STATUS (SHOWING % YES)

	Home Type (Q8)				Ownership Status (QD2)	
	Single family	Apartment	Condo/ Townhome	Mobile home	Own	Rent
Energy efficient lighting	88.9	52.2	78.9	69.3	87.0	57.2
Improved insulation, windows, roof, or other weatherization improvements	68.0	35.6	50.2	70.4	64.9	31.9
Solar panels	64.4	20.7	23.5	13.6	55.3	18.8
Smart home energy/Building mgmt system that monitors, controls heating/AC, lighting, appliances to optimize performance, reduce energy use	58.0	14.8	37.5	17.2	52.6	21.8
An electric stove	18.2	50.1	39.8	8.6	21.4	35.5
An electric heat pump water heater	20.0	27.4	16.4	0.0	20.8	27.5
Electric vehicle charging station	24.8	12.3	20.0	13.2	24.1	13.9
An electric furnace	19.2	16.7	23.4	0.0	21.7	16.9
Back-up battery storage	22.1	11.5	12.0	10.5	20.6	9.9

TABLE 22 ENERGY IMPROVEMENTS AT HOME/BUSINESS BY HOUSEHOLD INCOME SHOWING % YES)

	Household Income (QD5)				
	<$50K	$50K to <$99K	$100K to <$149K	$150K to <$199K	$200K+
Energy efficient lighting	73.6	72.0	82.0	91.7	90.1
Improved insulation, windows, roof, or other weatherization improvements	49.0	65.3	50.2	74.6	65.2
Solar panels	37.5	38.0	41.4	67.8	67.0
Smart home energy/Building mgmt system that monitors, controls heating/AC, lighting, appliances to optimize performance, reduce energy use	30.1	39.2	30.1	69.0	68.4
An electric stove	28.3	29.3	25.5	23.4	26.1
An electric heat pump water heater	24.5	18.5	12.0	15.0	23.4
Electric vehicle charging station	9.4	19.4	18.2	33.0	43.1
An electric furnace	20.3	16.0	25.4	20.3	17.4
Back-up battery storage	14.1	23.5	14.4	22.2	27.0

TABLE 23 ENERGY IMPROVEMENTS AT HOME/BUSINESS BY ETHNICITY & CUSTOMER TYPE

	Ethnicity (QD4)				Customer Type	
	Asian American	Caucasian / White	Latino / Hispanic	Mixed / Other	Residential	Commercial
Energy efficient lighting	96.0	81.2	77.3	70.0	79.6	66.8
Improved insulation, windows, roof, or other weatherization improvements	55.4	62.0	58.2	64.1	59.2	25.2
Solar panels	45.5	45.6	52.8	33.7	47.0	22.5
Smart home energy/Building mgmt system that monitors, controls heating/AC, lighting, appliances to optimize performance, reduce energy use	56.0	43.3	44.2	30.9	44.7	29.6
An electric stove	37.6	25.8	25.9	51.7	27.3	14.4
An electric heat pump water heater	27.7	14.4	26.0	28.6	19.7	39.4
Electric vehicle charging station	28.3	23.3	17.8	24.1	21.8	17.2
An electric furnace	21.1	17.8	22.0	20.8	19.3	27.8
Back-up battery storage	20.6	12.5	23.9	17.5	18.4	14.4

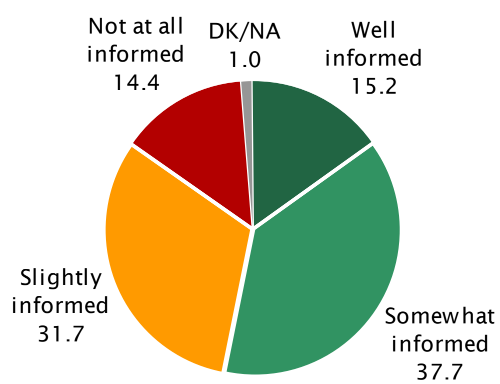
TABLE 24 ENERGY IMPROVEMENTS AT HOME/BUSINESS BY GENDER, CARE CUSTOMER IN DATABASE & ROOFTOP SOLAR CUSTOMER IN DATABASE (SHOWING % YES)

	Gender (QD3)		CARE Customer in Database		Rooftop Solar Customer in Database	
	Male	Female	Yes	No	Yes	No
Energy efficient lighting	92.9	64.1	75.9	78.6	88.3	73.3
Improved insulation, windows, roof, or other weatherization improvements	66.3	53.0	57.0	54.3	69.6	48.2
Solar panels	60.7	33.3	38.5	45.5	95.1	20.5
Smart home energy/Building mgmt system that monitors, controls heating/AC, lighting, appliances to optimize performance, reduce energy use	56.2	33.3	39.5	43.8	64.5	32.9
An electric stove	25.9	30.6	35.6	22.7	19.2	28.6
An electric heat pump water heater	24.9	14.8	26.5	20.9	16.5	24.8
Electric vehicle charging station	30.4	12.7	14.6	23.1	33.1	15.8
An electric furnace	20.1	16.6	19.1	20.8	17.9	21.6
Back-up battery storage	22.7	14.2	21.8	16.8	23.3	15.4

HOW INFORMED DO YOU FEEL? All customers were next asked to describe how informed they felt about the programs and services that are available to help residents/businesses with energy-related improvements. Most customers indicated they felt either well-informed (15%) or somewhat informed (38%) about the available programs and services, whereas one-third described themselves as slightly informed (32%). Approximately 14% of CEA customers indicated they are not at all informed about the programs and services that are available to help customers with energy-related improvements, whereas 1% were unsure or preferred to not answer the question.

Question 7 *In general, how informed do you feel about the programs and services that are available to help residents/businesses with energy-related improvements? Would you say you feel well informed, somewhat informed, slightly informed, or not at all informed?*

FIGURE 7 HOW INFORMED ABOUT ENERGY-RELATED PROGRAMS



When compared to their respective counterparts, seniors, those living in single family homes, home owners, residents of Carlsbad, high-income households, Caucasians, males, those not enrolled in the CARE program, and customers with rooftop solar were the most likely to describe themselves as at least somewhat informed about the programs and services available to help customers with energy-related improvements (see figures 8-10).

FIGURE 8 HOW INFORMED ABOUT ENERGY-RELATED PROGRAMS BY AGE, HOME TYPE & OWNERSHIP STATUS

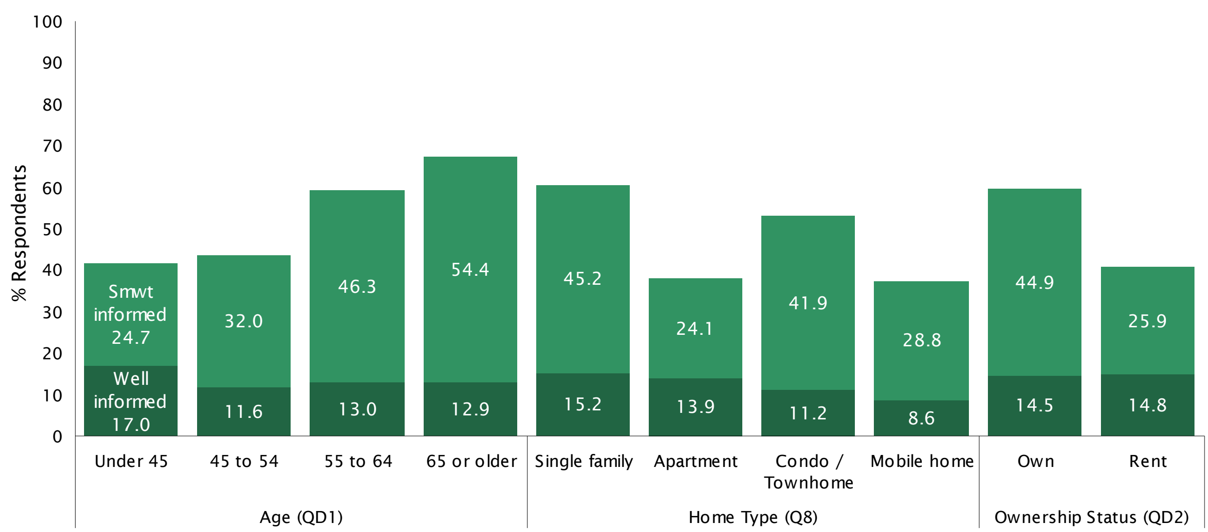


FIGURE 9 HOW INFORMED ABOUT ENERGY-RELATED PROGRAMS BY CUSTOMER CITY & HOUSEHOLD INCOME

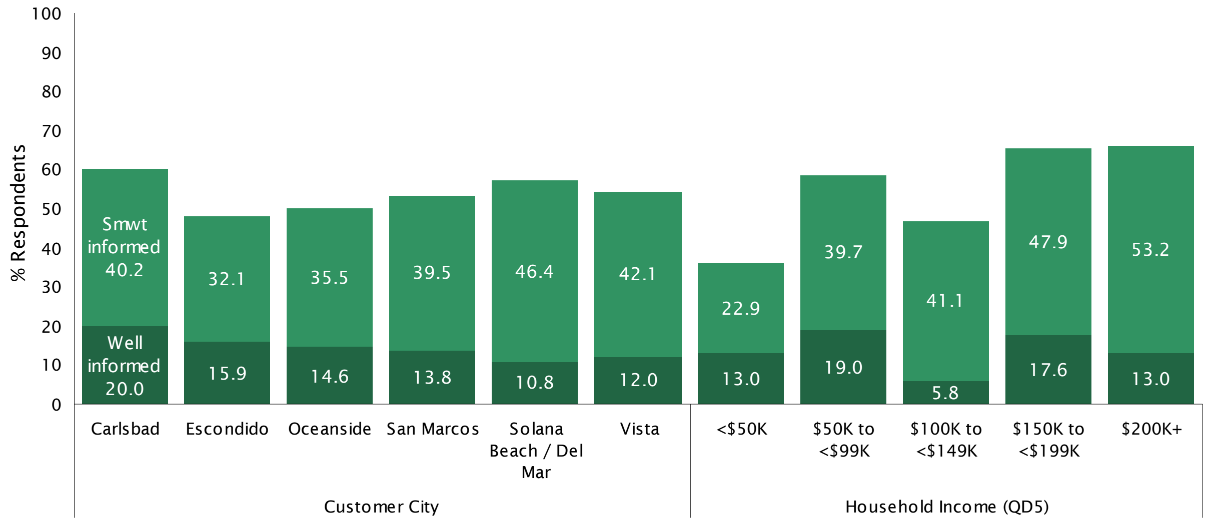
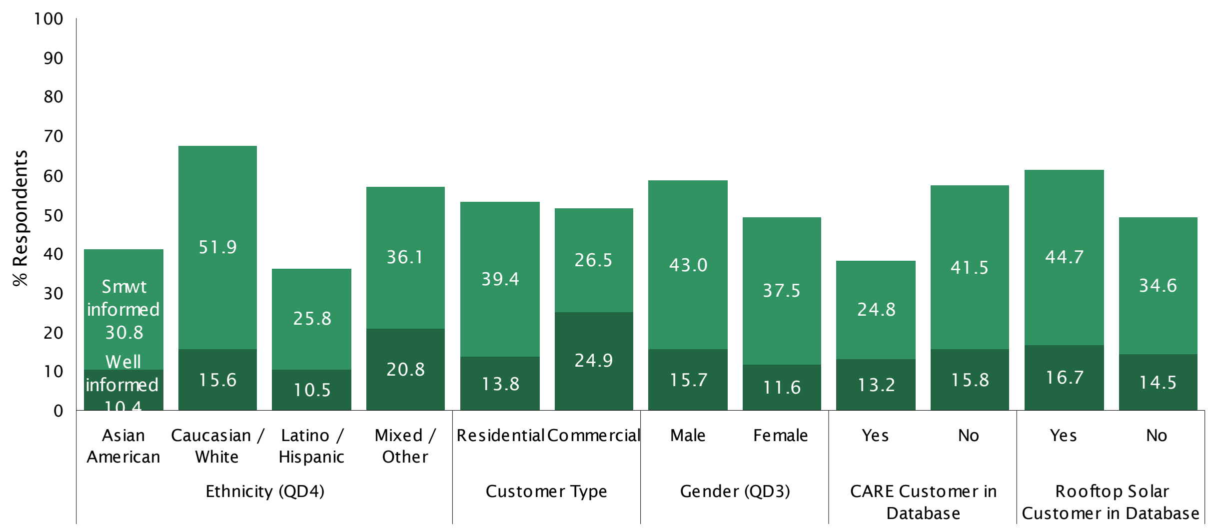


FIGURE 10 HOW INFORMED ABOUT ENERGY-RELATED PROGRAMS BY ETHNICITY, CUSTOMER TYPE, GENDER, CARE CUSTOMER IN DATABASE & ROOFTOP SOLAR CUSTOMER IN DATABASE



AWARENESS OF SPECIFIC PROGRAMS Regardless of how informed customers felt about the availability of energy improvement programs in Question 8, Question 9 presented respondents with a list of 10 specific programs and asked if they were aware of each program prior to taking the survey.[2] Most CEA customers indicated they were aware of discounted rates for energy used during off-peak hours (79%), discounted rates for low-income households (67%), and rebates/incentives to install solar panels and battery storage (61%) prior to taking the survey (see Figure 11). Approximately four-in-ten customers were aware of rebates/incentives to make energy-efficiency improvements to your home/business, such as improved insulation and windows (46%) and to install energy efficient lighting, appliances, and equipment (44%), discounted

2. Programs that only apply to single family homes, condominiums, or townhomes were only asked of customers residing in these types of homes. Similarly, programs that do not apply to commercial customers were not asked of this group.

rates for those who have medical equipment in their home (44%), and free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills (44%).

When compared to the other programs tested, CEA customers were less aware of rebates/incentives to install electric vehicle charging equipment (35%), rebates and incentives to replace gas appliances and equipment with electric appliances and equipment (31%), and programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere (23%). Tables 25-30 show how awareness of each program varied among CEA customer subgroups, with the top three programs highlighted in green for each subgroup.

Question 9 *As I read the following list of programs that may be available in your community, please indicate if you were aware of the program's existence prior to taking the survey.*

FIGURE 11 AWARENESS OF PROGRAMS

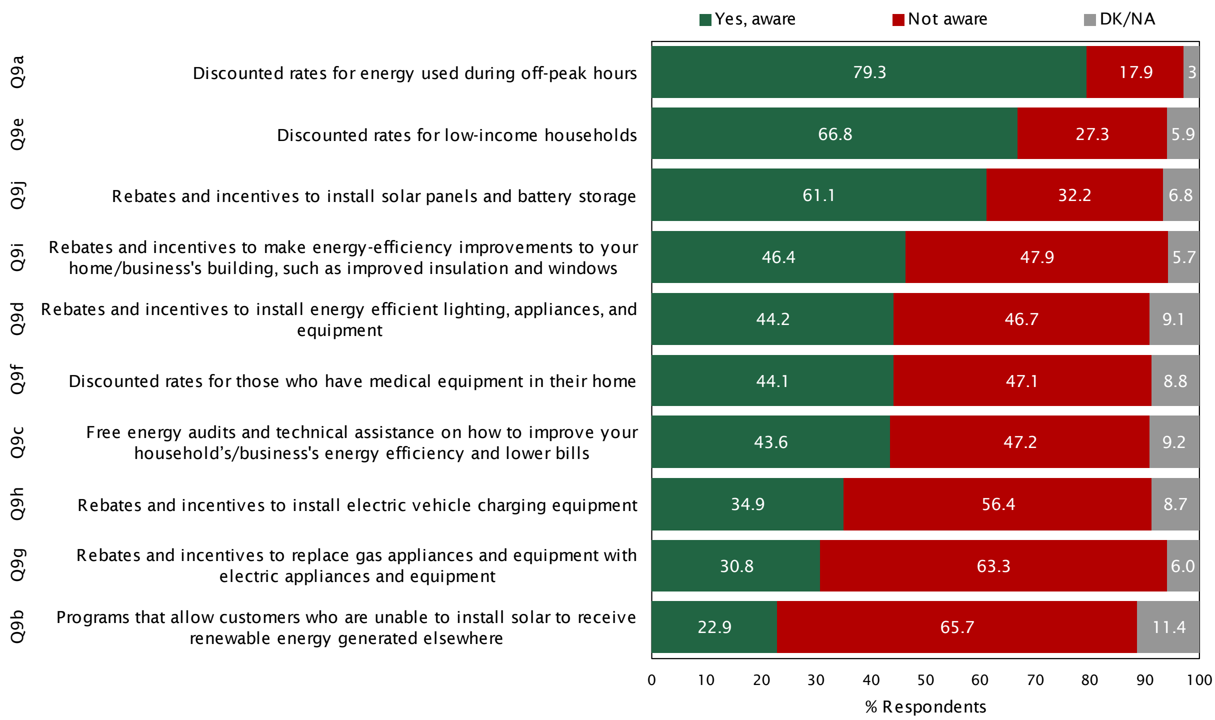


Table 25 Awareness of Programs by Age (Showing % Aware)

	Age (QD1)			
	Under 45	45 to 54	55 to 64	65 or older
Discounted rates for energy used during off-peak hours	80.3	79.1	85.1	82.1
Discounted rates for low-income households	73.0	67.9	69.1	67.9
Rebates and incentives to install solar panels and battery storage	55.9	54.8	65.3	64.5
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	32.8	44.8	42.8	57.8
Rebates and incentives to install energy efficient lighting, appliances, and equipment	46.4	23.2	53.3	49.6
Discounted rates for those who have medical equipment in their home	32.5	26.2	57.5	53.7
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	28.4	37.1	54.7	51.0
Rebates and incentives to install electric vehicle charging equipment	58.0	21.9	42.2	35.5
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	41.7	21.6	28.0	32.4
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	40.8	15.7	31.3	17.3

Table 26 Awareness of Programs by Customer City (Showing % Aware)

	Customer City					
	Carlsbad	Escondido	Oceanside	San Marcos	Solana Beach / Del Mar	Vista
Discounted rates for energy used during off-peak hours	81.7	75.5	85.3	75.4	77.4	75.8
Discounted rates for low-income households	64.8	69.9	61.1	71.3	55.9	72.4
Rebates and incentives to install solar panels and battery storage	67.1	71.3	60.6	56.3	73.1	40.1
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	46.5	44.9	43.7	59.8	57.7	36.1
Rebates and incentives to install energy efficient lighting, appliances, and equipment	48.7	49.5	42.2	48.2	53.5	29.5
Discounted rates for those who have medical equipment in their home	43.7	43.2	43.1	43.1	36.9	49.3
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	53.3	41.7	44.4	44.5	72.7	26.2
Rebates and incentives to install electric vehicle charging equipment	28.0	47.9	34.6	35.5	52.1	20.8
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	23.0	35.9	29.1	35.2	55.0	25.7
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	28.3	23.7	22.0	27.7	21.6	13.4

Table 27 Awareness of Programs by Home Type & Ownership Status (Showing % Aware)

	Home Type (Q8)				Ownership Status (QD2)	
	Single family	Apartment	Condo/ Townhome	Mobile home	Own	Rent
Discounted rates for energy used during off-peak hours	89.0	65.7	82.5	25.0	85.6	70.5
Discounted rates for low-income households	68.7	67.7	61.8	82.1	70.6	62.2
Rebates and incentives to install solar panels and battery storage	68.2	0.0	45.4	0.0	64.2	44.9
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	49.2	0.0	48.8	0.0	47.6	37.0
Rebates and incentives to install energy efficient lighting, appliances, and equipment	47.7	23.4	48.1	20.3	49.5	30.6
Discounted rates for those who have medical equipment in their home	43.1	41.6	49.8	65.0	45.4	41.4
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	47.3	31.9	46.1	11.7	47.9	33.8
Rebates and incentives to install electric vehicle charging equipment	37.9	0.0	31.2	0.0	36.0	27.0
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	31.1	0.0	29.8	0.0	31.7	22.4
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	24.3	18.3	26.5	13.2	24.0	19.1

Table 28 Awareness of Programs by Household Income (Showing % Aware)

	Household Income (QD5) <$50K	$50K to <$99K	$100K to <$149K	$150K to <$199K	$200K+
Discounted rates for energy used during off-peak hours	66.7	79.4	88.3	94.1	87.2
Discounted rates for low-income households	66.2	72.7	63.0	62.7	69.4
Rebates and incentives to install solar panels and battery storage	52.6	59.4	68.6	67.7	65.3
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	42.4	30.2	56.9	63.5	49.4
Rebates and incentives to install energy efficient lighting, appliances, and equipment	27.5	42.1	53.1	56.3	53.4
Discounted rates for those who have medical equipment in their home	36.1	51.2	39.4	44.9	46.7
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	29.8	40.3	49.8	48.3	49.1
Rebates and incentives to install electric vehicle charging equipment	28.3	34.5	32.9	30.5	42.0
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	16.9	25.5	38.3	28.0	38.6
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	15.5	19.0	34.3	28.5	21.7

Table 29 Awareness of Programs by Ethnicity & Customer Type (Showing % Aware)

	Ethnicity (QD4) Asian American	Caucasian / White	Latino / Hispanic	Mixed / Other	Customer Type Residential	Commercial
Discounted rates for energy used during off-peak hours	96.0	86.9	73.1	76.5	80.0	74.3
Discounted rates for low-income households	55.7	71.9	60.6	69.1	66.8	0.0
Rebates and incentives to install solar panels and battery storage	39.2	70.7	49.2	47.2	62.5	53.5
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	34.6	54.1	35.1	44.2	49.1	32.1
Rebates and incentives to install energy efficient lighting, appliances, and equipment	36.6	51.5	36.5	34.0	43.1	51.7
Discounted rates for those who have medical equipment in their home	40.1	53.5	27.8	54.2	44.1	0.0
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	51.3	51.5	23.1	47.2	42.6	50.5
Rebates and incentives to install electric vehicle charging equipment	34.6	36.7	24.8	35.3	36.2	28.0
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	35.4	30.3	30.2	15.7	30.7	30.8
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	16.5	24.6	18.9	10.3	22.9	22.8

Table 30 Awareness of Programs by Gender, CARE Customer in Database & Rooftop Solar Customer in Database (Showing % Aware)

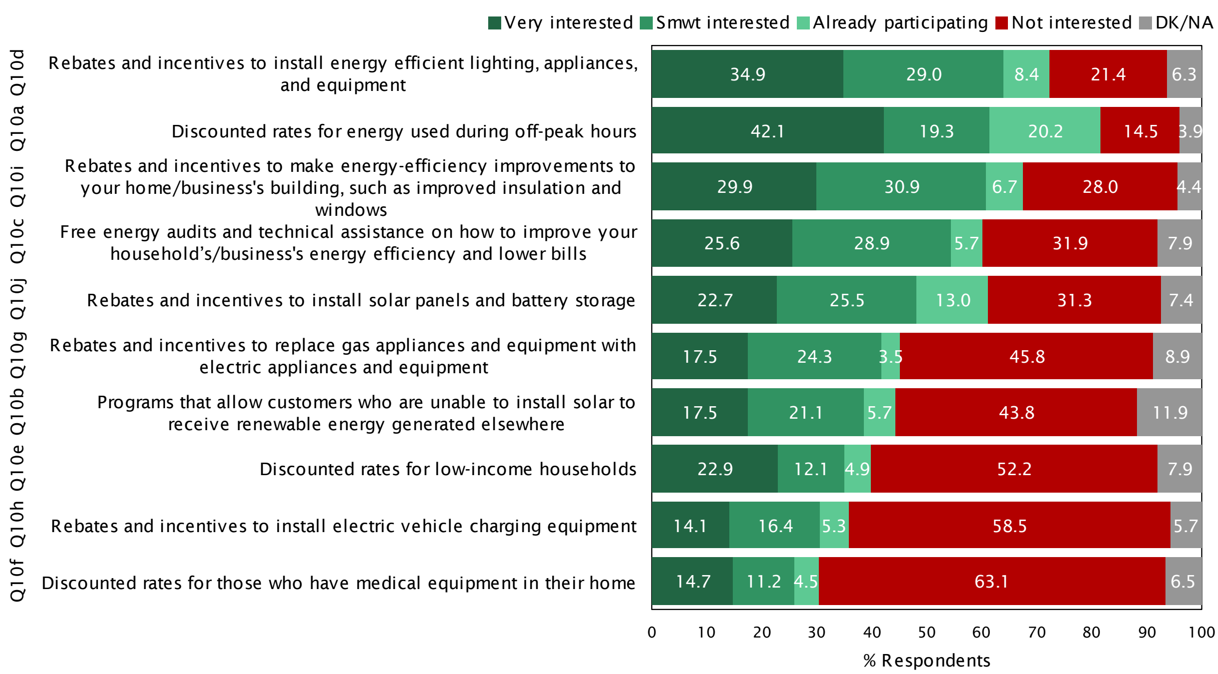
	Gender (QD3) Male	Female	CARE Customer in Database Yes	No	Rooftop Solar Customer in Database Yes	No
Discounted rates for energy used during off-peak hours	81.7	77.8	71.0	81.7	86.2	76.1
Discounted rates for low-income households	64.8	68.8	76.6	63.3	62.8	69.0
Rebates and incentives to install solar panels and battery storage	64.1	59.7	49.2	63.1	76.9	51.4
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	50.1	44.9	35.0	48.4	51.9	43.0
Rebates and incentives to install energy efficient lighting, appliances, and equipment	44.2	42.2	29.0	48.7	45.0	43.8
Discounted rates for those who have medical equipment in their home	41.3	46.9	46.3	43.3	35.1	49.0
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	40.3	44.5	30.2	47.6	49.9	40.8
Rebates and incentives to install electric vehicle charging equipment	38.1	30.2	17.1	38.0	37.1	33.6
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	27.8	31.4	19.7	32.7	27.1	33.0
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	24.3	18.8	12.0	26.1	20.5	24.0

INTEREST IN PROGRAMS Irrespective of their prior awareness of the programs, all respondents were next asked how *interested* their household or business would be in participating in the same list of programs. As shown in Figure 12 below, CEA customers expressed the greatest interest in rebates and incentives to install energy efficient lighting, appliances, and equipment (64% very or somewhat interested), discounted rates for energy used during off-peak hours (61%), and rebates and incentives to make energy-efficient improvements to their home/ business's building, such as improved insulation and windows (61%). Free energy audits and technical assistance on how to improve their household's/business's energy efficiency and lower bills (55%) and rebates and incentives to install solar panels and batter storage (48%) were also popular with many customers.

At the other end of the spectrum, programs that had a narrow target audience or purpose tended to garner less interest, including discounted rates for those who have medical equipment in their home (26%), rebates and incentives to install electric vehicle charging equipment (31%), and discounted rates for low-income households (35%).

Question 10 *For the same list of programs, please indicate how interested your household/ business would be in participating in the program. If your household/business is already participating in the program, please indicate so.*

FIGURE 12 INTEREST IN PROGRAMS



Tables 31-36 show how interest in each program varied across subgroups of CEA customers, with the top three programs of interest within each subgroup highlighted in green to ease comparisons.

TABLE 31 INTEREST IN PROGRAMS BY AGE (SHOWING % VERY OR SOMEWHAT INTERESTED)

	Age (QD1)			
	Under 45	45 to 54	55 to 64	65 or older
Rebates and incentives to install energy efficient lighting, appliances, equipment	87.8	77.6	65.4	58.2
Discounted rates for energy used during off-peak hours	79.5	71.2	51.7	54.5
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	90.8	69.3	68.4	52.6
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	70.0	58.8	60.6	59.0
Rebates and incentives to install solar panels and battery storage	53.8	68.5	60.9	37.9
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	42.6	52.4	48.3	47.2
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	55.0	32.5	28.6	42.7
Discounted rates for low-income households	64.3	34.8	19.1	36.9
Rebates and incentives to install electric vehicle charging equipment	35.3	61.3	28.6	19.9
Discounted rates for those who have medical equipment in their home	28.7	36.5	17.9	33.2

TABLE 32 INTEREST IN PROGRAMS BY CUSTOMER CITY (SHOWING % VERY OR SOMEWHAT INTERESTED

	Customer City					
	Carlsbad	Escondido	Oceanside	San Marcos	Solana Beach / Del Mar	Vista
Rebates and incentives to install energy efficient lighting, appliances, equipment	72.6	65.7	58.9	54.8	65.1	67.9
Discounted rates for energy used during off-peak hours	59.8	62.7	60.9	62.7	62.9	61.0
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	65.6	58.9	59.5	61.8	60.6	58.4
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	65.3	50.4	53.1	46.7	53.6	57.1
Rebates and incentives to install solar panels and battery storage	44.8	48.6	48.5	59.0	29.5	45.6
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	45.1	39.1	41.9	38.2	40.6	44.6
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	42.2	40.2	39.8	33.0	32.0	37.2
Discounted rates for low-income households	33.4	43.1	27.8	29.7	6.1	49.1
Rebates and incentives to install electric vehicle charging equipment	33.6	25.1	26.2	46.7	18.2	29.4
Discounted rates for those who have medical equipment in their home	21.4	34.1	21.9	21.7	6.1	34.7

TABLE 33 INTEREST IN PROGRAMS BY HOME TYPE & OWNERSHIP STATUS (SHOWING % VERY OR SOMEWHAT INTERESTED

	Home Type (Q8)				Ownership Status (QD2)	
	Single family	Apartment	Condo/ Townhome	Mobile home	Own	Rent
Rebates and incentives to install energy efficient lighting, appliances, equipment	62.6	81.0	59.9	64.6	62.9	68.0
Discounted rates for energy used during off-peak hours	56.3	85.4	59.2	63.9	55.3	74.6
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	64.0	0.0	52.3	0.0	62.8	53.9
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	52.2	52.2	58.5	63.9	54.3	55.7
Rebates and incentives to install solar panels and battery storage	53.1	0.0	34.2	0.0	50.9	41.2
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	47.2	0.0	34.7	0.0	46.7	26.9
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	24.5	46.0	48.5	60.0	33.6	51.4
Discounted rates for low-income households	25.5	62.7	31.9	56.1	28.5	55.5
Rebates and incentives to install electric vehicle charging equipment	31.6	0.0	27.1	0.0	30.5	30.8
Discounted rates for those who have medical equipment in their home	22.5	36.9	19.0	52.2	22.4	35.7

Table 34 Interest in Programs by Household Income (Showing % Very or Somewhat Interested

	Household Income (QD5)				
	<$50K	$50K to <$99K	$100K to <$149K	$150K to <$199K	$200K+
Rebates and incentives to install energy efficient lighting, appliances, equipment	73.1	71.5	61.6	66.4	61.8
Discounted rates for energy used during off-peak hours	80.8	69.4	58.6	57.7	47.0
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	76.7	65.3	55.4	56.5	62.9
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	69.1	62.9	52.2	51.9	40.4
Rebates and incentives to install solar panels and battery storage	52.1	40.1	45.6	61.1	61.1
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	56.4	45.7	40.8	51.5	37.9
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	40.5	44.8	44.5	37.1	15.6
Discounted rates for low-income households	71.6	58.7	15.3	18.0	14.0
Rebates and incentives to install electric vehicle charging equipment	28.7	21.8	35.1	39.9	39.2
Discounted rates for those who have medical equipment in their home	56.0	27.1	17.9	19.9	9.8

Table 35 Interest in Programs by Ethnicity & Customer Type (Showing % Very or Somewhat Interested

	Ethnicity (QD4)				Customer Type	
	Asian American	Caucasian / White	Latino / Hispanic	Mixed / Other	Residential	Commercial
Rebates and incentives to install energy efficient lighting, appliances, equipment	72.2	59.5	79.6	55.3	65.2	55.1
Discounted rates for energy used during off-peak hours	48.7	54.7	79.6	60.6	62.2	56.1
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	78.0	52.9	73.0	56.2	61.1	59.5
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	60.5	54.1	59.6	56.3	53.8	58.8
Rebates and incentives to install solar panels and battery storage	69.8	44.8	58.6	35.6	48.3	47.5
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	59.9	40.7	51.8	28.6	44.1	29.4
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	60.9	33.3	39.3	26.6	34.8	64.8
Discounted rates for low-income households	36.6	24.8	56.7	41.6	35.0	0.0
Rebates and incentives to install electric vehicle charging equipment	33.7	23.7	47.7	32.2	30.5	30.8
Discounted rates for those who have medical equipment in their home	19.0	24.9	31.6	38.4	25.9	0.0

Table 36 Interest in Programs by Gender, CARE Customer in Database & Rooftop Solar Customer in Database (Showing % Very or Somewhat Interested

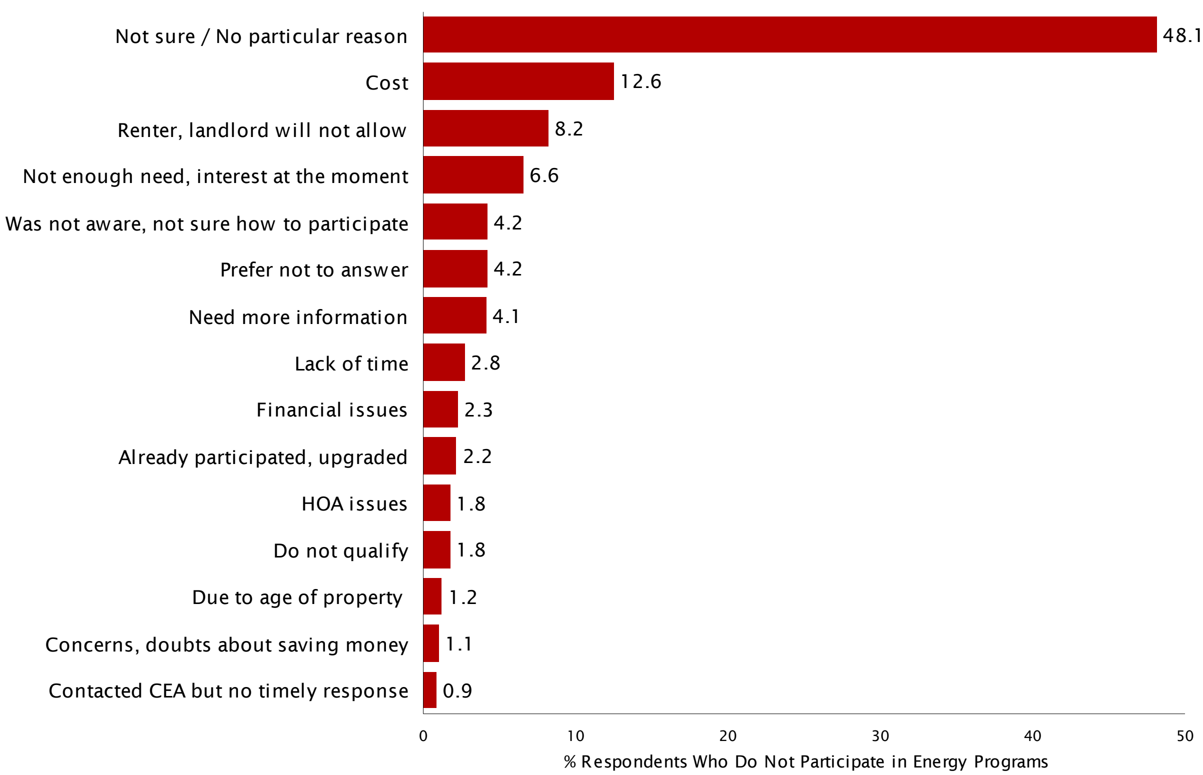
	Gender (QD3)		CARE Customer in Database		Rooftop Solar Customer in Database	
	Male	Female	Yes	No	Yes	No
Rebates and incentives to install energy efficient lighting, appliances, equipment	71.2	60.8	76.0	60.4	65.1	63.4
Discounted rates for energy used during off-peak hours	63.7	61.9	80.6	55.8	55.4	64.2
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	63.6	58.7	65.5	60.0	58.5	62.2
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	55.9	54.1	58.4	53.3	49.9	56.6
Rebates and incentives to install solar panels and battery storage	57.3	37.6	43.4	49.0	52.5	45.6
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	46.8	38.8	60.4	38.5	50.6	36.3
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	33.1	38.2	42.1	37.5	14.2	49.7
Discounted rates for low-income households	37.3	36.7	64.9	24.5	26.3	39.8
Rebates and incentives to install electric vehicle charging equipment	39.5	17.7	40.4	28.8	33.8	28.5
Discounted rates for those who have medical equipment in their home	34.5	18.6	42.1	20.2	23.1	27.5

REASONS FOR NOT PARTICIPATING IN PROGRAMS Respondents who indicated they were previously aware of a program (Question 9) and were interested in the program, but had yet to participate (Question 10), were subsequently asked if there was a particular obstacle or reason keeping them from participating. Question 11 was presented in an open-ended manner so that respondents could cite any obstacle or reason that came to mind without being prompted by or constrained to a particular list of options. True North later reviewed the verbatim respondents and grouped them into the categories shown in Figure 13 below.

Nearly half of respondents (48%) who received Question 11 indicated they weren't sure or there was no particular reason for not participating in the program(s) to date. Among the specific reasons offered, cost was the most common (13%), followed by the fact they are a renter and the landlord would not allow their participation (8%), and they did not have enough need/interest at the moment (7%).

Question 11 *You mentioned your household/business would be interested in participating in certain energy programs, but has yet to do so. Is there a particular obstacle or reason keeping you from participating?*

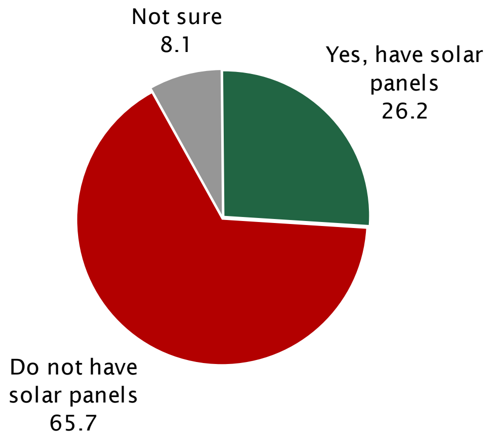
FIGURE 13 REASON, OBSTACLE FOR NOT PARTICIPATING IN ENERGY PROGRAM



COMMUNITY SOLAR PANELS & EV CHARGING STATIONS CEA customers who reside in apartments or mobile homes are often limited in their ability to participate in clean-energy solutions like solar panels, battery storage, and EV charging stations. The decision to make these energy improvements is left to those who own the apartment or complex. Accordingly, the survey asked respondents who live in an apartment or mobile home whether their community has solar panels (Question 12) and an EV charging station(s) (Question 13). Approximately one-quarter of respondents (26%) who fit this housing category indicated their community has solar panels (Figure 14), whereas just 8% reported that their community has one or more EV charging stations (Figure 15).

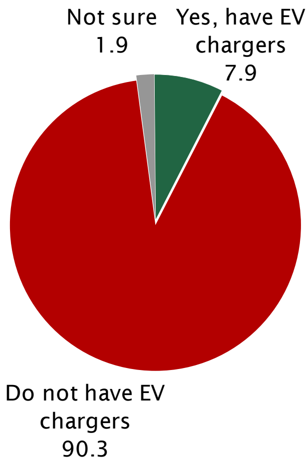
Question 12 *Does your <<apartment | mobile home>> community have solar panels?*

FIGURE 14 SOLAR PANELS AT APARTMENT/MOBILE HOME COMMUNITY



Question 13 *Does your <<apartment | mobile home>> community have electric vehicle chargers?*

FIGURE 15 ELECTRIC VEHICLE CHARGERS AVAILABLE AT APARTMENT/MOBILE HOME COMMUNITY



COMMUNICATION

The final substantive questions of the survey focused on CEA customers' communication habits and preferences, their prior awareness of their status as a CEA customer, as well as any final suggestions they may have for CEA regarding ways to better serve their needs.

PRIMARY INFORMATION SOURCE FOR LOCAL EVENTS & PROGRAMS When asked to describe their *primary* source for information about local events and programs, the Internet in general (not including Social Media) was the most common source (43%), followed by television (20%), social media (14%), and newspapers (9%). Figures 17-20 show how CEA customers' primary information sources varied by subgroup.

Question 14 *Which of the following would you say is your primary source for information about local events and programs?*

FIGURE 16 PRIMARY SOURCE OF INFORMATION

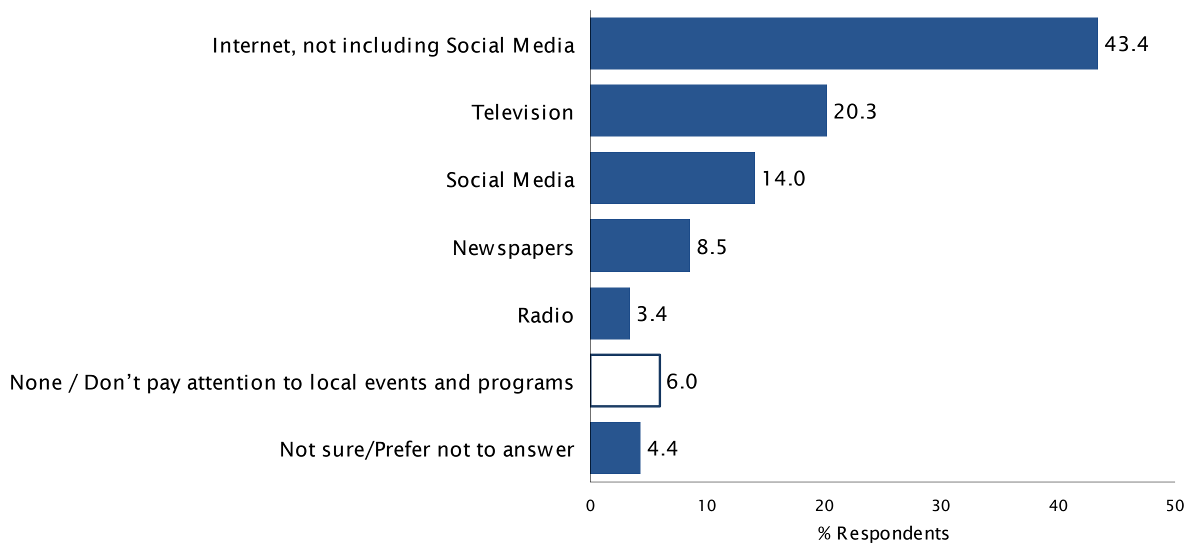


FIGURE 17 PRIMARY SOURCE OF INFORMATION BY HOME TYPE & AGE BY THOSE WHO PROVIDED OPINION

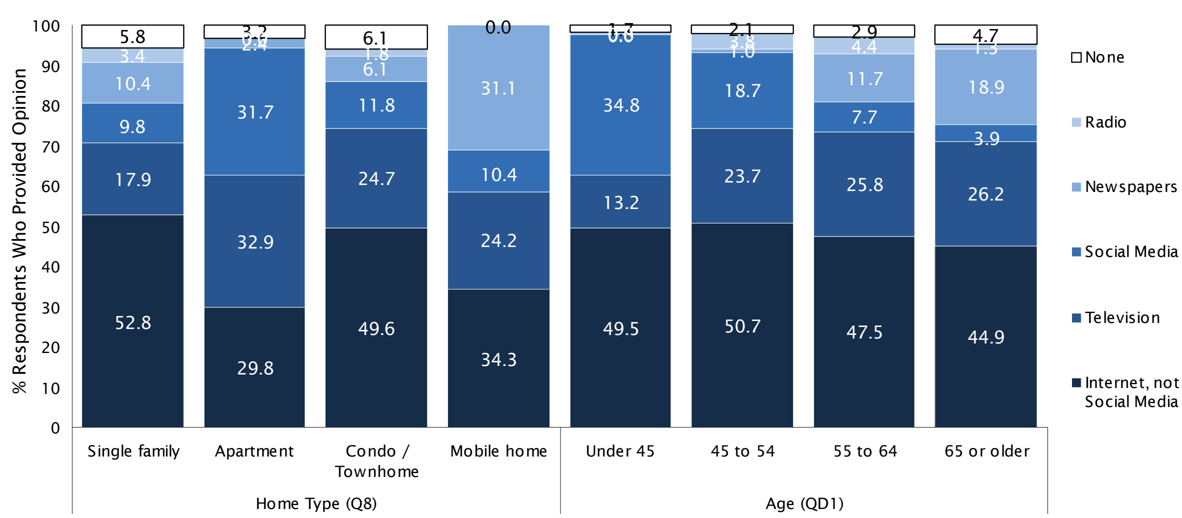


FIGURE 18 PRIMARY SOURCE OF INFORMATION HOW INFORMED ABOUT ENERGY RELATED IMPROVEMENTS & CUSTOMER CITY BY THOSE WHO PROVIDED OPINION

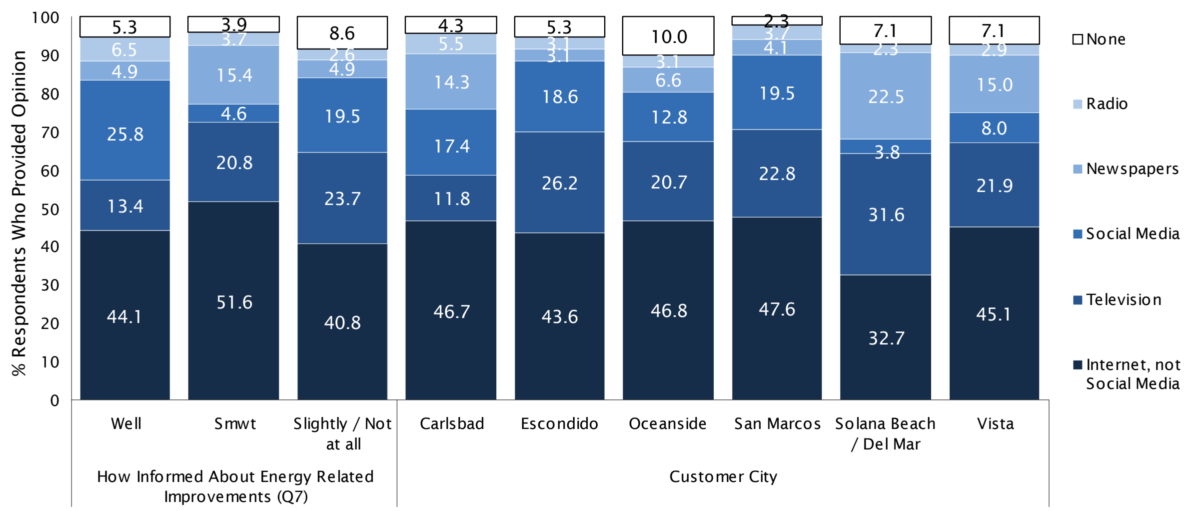


FIGURE 19 PRIMARY SOURCE OF INFORMATION ETHNICITY & HOUSEHOLD INCOME BY THOSE WHO PROVIDED OPINION

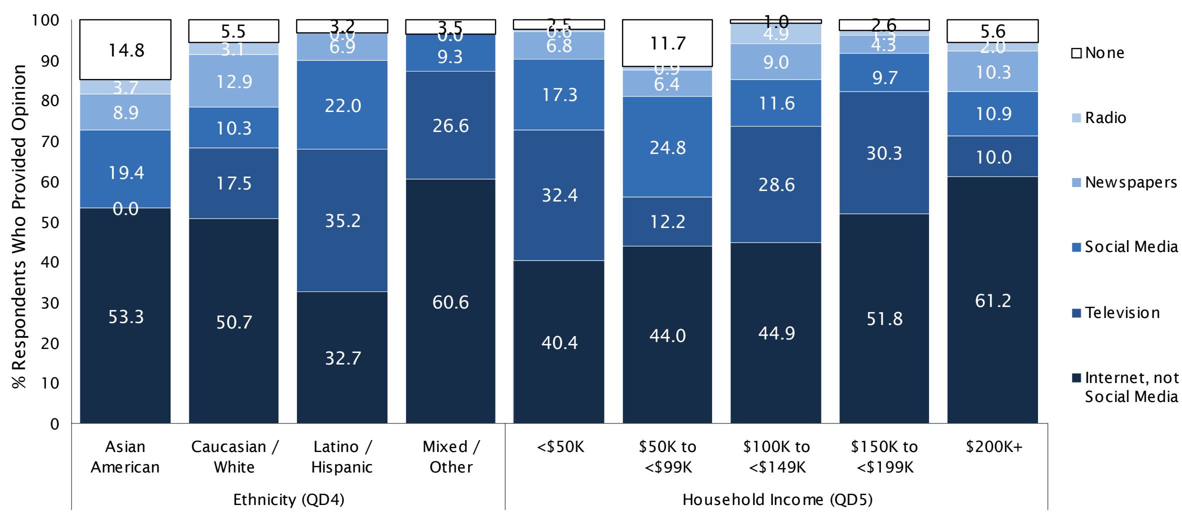
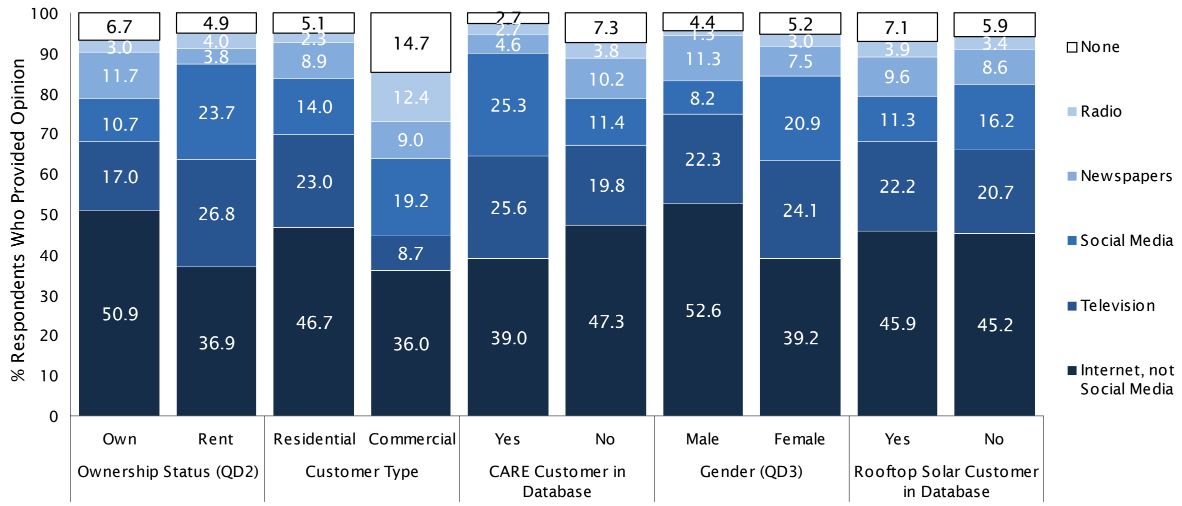


FIGURE 20 PRIMARY SOURCE OF INFORMATION BY OWNERSHIP STATUS, CUSTOMER TYPE, CARE CUSTOMER IN DATABASE, GENDER & ROOFTOP SOLAR CUSTOMER IN DATABASE THOSE WHO PROVIDED OPINION

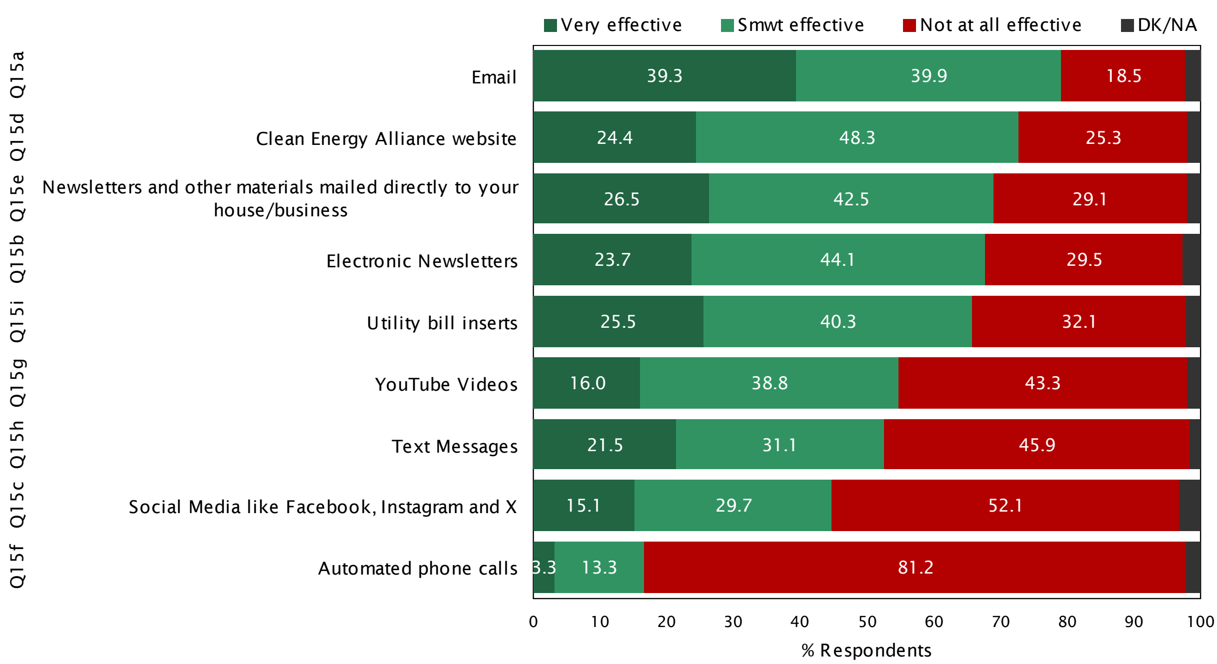


EFFECTIVE COMMUNICATION METHODS

To help CEA identify the most effective means of communicating with customers, it is helpful to understand which methods of communication they prefer. Accordingly, for each of the methods shown to the left of Figure 21, respondents were simply asked to indicate if it would be an effective way for CEA to communicate with them.

Question 15 *As I read the following ways that the Clean Energy Alliance can communicate with customers, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for communicating with you/your business.*

FIGURE 21 EFFECTIVENESS OF COMMUNICATION METHODS



Overall, CEA customers ranked email (79% very or somewhat effective), the Clean Energy Alliance website (73%), direct mail (69%), electronic newsletters (68%), and utility bill inserts (66%) as the most effective methods for CEA to communicate with them. Preferred communication methods varied considerably across CEA subgroups as shown in tables 37-42.

TABLE 37 EFFECTIVENESS OF COMMUNICATION METHODS BY AGE (SHOWING % VERY EFFECTIVE)

	Age (QD1)			
	Under 45	45 to 54	55 to 64	65 or older
Email	56.6	53.8	32.1	39.8
Newsletters, other materials mailed directly to your house/business	24.7	32.8	27.9	27.5
Utility bill inserts	28.9	23.3	22.9	29.8
Clean Energy Alliance website	32.7	35.7	19.5	24.4
Electronic Newsletters	26.4	28.6	30.1	33.0
Text Messages	33.4	30.9	15.2	18.7
YouTube Videos	27.5	34.8	10.7	8.7
Social Media like Facebook, Instagram and X	28.6	27.1	14.2	6.1
Automated phone calls	4.9	12.1	0.0	0.0

TABLE 38 EFFECTIVENESS OF COMMUNICATION METHODS BY CUSTOMER CITY (SHOWING % VERY EFFECTIVE)

	Customer City					
	Carlsbad	Escondido	Oceanside	San Marcos	Solana Beach / Del Mar	Vista
Email	31.6	45.2	36.3	48.4	29.5	39.5
Newsletters, other materials mailed directly to your house/business	27.2	28.2	26.1	18.7	25.7	31.2
Utility bill inserts	24.0	35.8	25.8	23.0	16.4	17.9
Clean Energy Alliance website	25.0	29.6	22.6	21.3	24.9	22.8
Electronic Newsletters	29.4	21.8	19.4	21.4	28.6	27.2
Text Messages	13.2	34.1	18.4	10.2	4.6	33.8
YouTube Videos	12.0	14.5	19.5	23.3	4.7	13.1
Social Media like Facebook, Instagram and X	20.0	9.4	18.5	7.8	7.0	20.0
Automated phone calls	3.3	6.0	1.0	2.2	0.0	5.1

TABLE 39 EFFECTIVENESS OF COMMUNICATION METHODS BY HOME TYPE & OWNERSHIP STATUS (SHOWING % VERY EFFECTIVE)

	Home Type (Q8)				Ownership Status (QD2)	
	Single family	Apartment	Condo/ Townhome	Mobile home	Own	Rent
Email	41.7	29.9	55.6	36.7	43.6	33.8
Newsletters, other materials mailed directly to your house/business	24.2	36.0	30.4	53.2	27.0	27.0
Utility bill inserts	25.9	34.1	15.5	44.3	23.1	27.3
Clean Energy Alliance website	24.0	17.3	32.1	54.0	26.1	19.3
Electronic Newsletters	28.2	17.3	28.5	8.6	27.8	15.5
Text Messages	16.9	31.9	25.6	31.1	19.1	26.4
YouTube Videos	16.0	17.1	21.3	6.5	16.0	17.8
Social Media like Facebook, Instagram and X	12.8	22.0	13.5	31.1	13.5	19.5
Automated phone calls	1.1	10.3	1.8	0.0	1.0	8.8

TABLE 40 EFFECTIVENESS OF COMMUNICATION METHODS BY HOUSEHOLD INCOME (SHOWING % VERY EFFECTIVE)

	Household Income (QD5)				
	<$50K	$50K to <$99K	$100K to <$149K	$150K to <$199K	$200K+
Email	42.1	45.4	45.3	42.9	40.5
Newsletters, other materials mailed directly to your house/business	39.6	15.2	26.9	19.4	29.5
Utility bill inserts	39.7	22.8	23.7	35.7	6.7
Clean Energy Alliance website	37.1	30.8	17.1	14.0	23.7
Electronic Newsletters	26.0	25.8	18.7	27.5	31.6
Text Messages	42.7	23.2	21.4	10.1	17.1
YouTube Videos	23.9	23.4	16.5	8.7	14.0
Social Media like Facebook, Instagram and X	24.6	28.4	8.4	6.9	11.2
Automated phone calls	5.1	6.6	0.0	1.3	0.0

TABLE 41 EFFECTIVENESS OF COMMUNICATION METHODS BY ETHNICITY & CUSTOMER TYPE (SHOWING % VERY EFFECTIVE)

	Ethnicity (QD4)				Customer Type	
	Asian American	Caucasian / White	Latino / Hispanic	Mixed / Other	Residential	Commercial
Email	52.5	41.2	47.4	35.9	41.4	25.0
Newsletters, other materials mailed directly to your house/business	24.3	27.8	31.6	23.9	27.9	16.6
Utility bill inserts	20.7	24.3	31.1	30.5	26.4	19.2
Clean Energy Alliance website	23.4	18.0	34.8	25.8	25.7	15.4
Electronic Newsletters	22.2	26.2	35.3	19.2	25.9	8.1
Text Messages	16.0	15.9	38.7	23.9	22.2	16.6
YouTube Videos	16.9	10.5	28.6	20.0	16.5	12.7
Social Media like Facebook, Instagram and X	8.1	9.6	28.0	13.4	14.9	16.7
Automated phone calls	0.0	0.7	5.1	10.5	2.8	6.8

TABLE 42 EFFECTIVENESS OF COMMUNICATION METHODS BY GENDER, CARE CUSTOMER IN DATABASE & ROOFTOP SOLAR CUSTOMER IN DATABASE (SHOWING % VERY EFFECTIVE)

	Gender (QD3)		CARE Customer		Rooftop Solar Customer	
	Male	Female	Yes	No	Yes	No
Email	42.5	39.6	48.4	36.7	41.3	38.4
Newsletters, other materials mailed directly to your house/business	25.6	30.2	42.7	21.7	22.5	28.3
Utility bill inserts	24.6	26.5	34.6	22.8	23.2	26.6
Clean Energy Alliance website	26.6	23.1	43.5	18.8	21.4	25.8
Electronic Newsletters	30.7	23.1	24.8	23.3	32.3	19.7
Text Messages	23.9	21.7	44.9	14.6	15.0	24.5
YouTube Videos	18.8	15.0	24.0	13.7	16.3	15.9
Social Media like Facebook, Instagram and X	15.3	15.1	25.1	12.1	14.8	15.2
Automated phone calls	4.2	1.6	8.7	1.7	1.0	4.3

CLEAN ENERGY ALLIANCE CUSTOMER AWARENESS Among respondents who opted into the survey, most (78%) were aware prior to taking the survey that the energy their household or business receives is provided by Clean Energy Alliance (Figure 22). Awareness of being a CEA customer generally increased with age and income, and was highest among those living in single family homes and mobile homes, residents/businesses in Carlsbad, Escondido, Solana Beach and Del Mar, residential customers, males, Asians and Caucasians, those who felt somewhat informed about energy-efficiency programs, customers with rooftop solar, and those who own their residence (see figures 23-26).

Question 16 *Prior to taking this survey, were you aware that the energy your household/business uses is provided by the Clean Energy Alliance?*

FIGURE 22 AWARENESS OF CLEAN ENERGY ALLIANCE

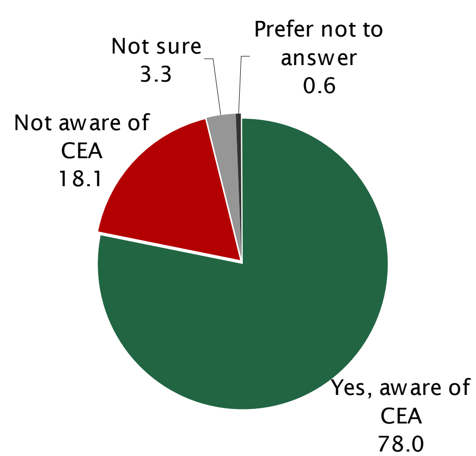


FIGURE 23 AWARENESS OF CLEAN ENERGY ALLIANCE BY AGE & HOME TYPE

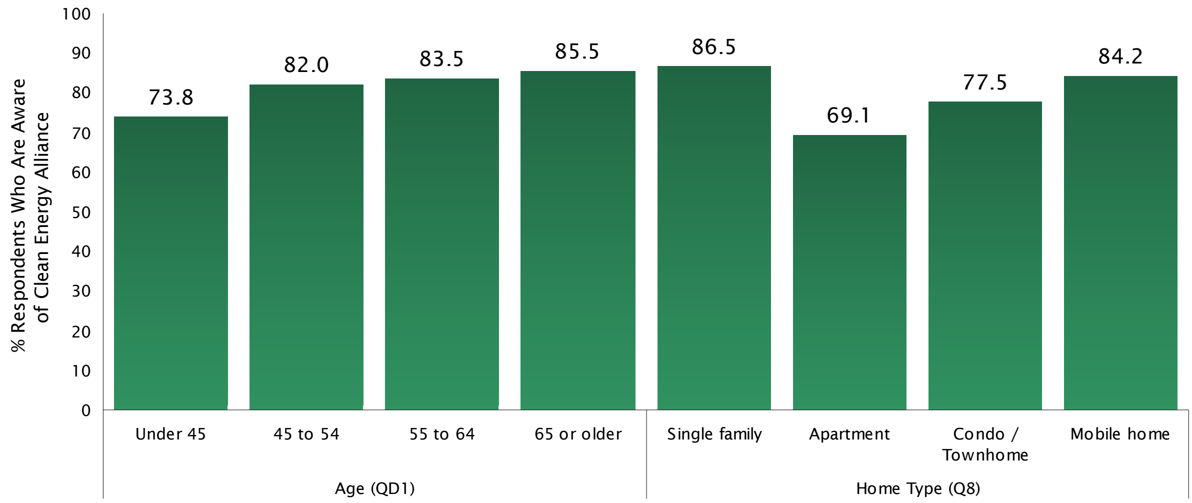


FIGURE 24 AWARENESS OF CLEAN ENERGY ALLIANCE BY CLEAN ENERGY ALLIANCE BY CUSTOMER CITY, CUSTOMER TYPE & GENDER

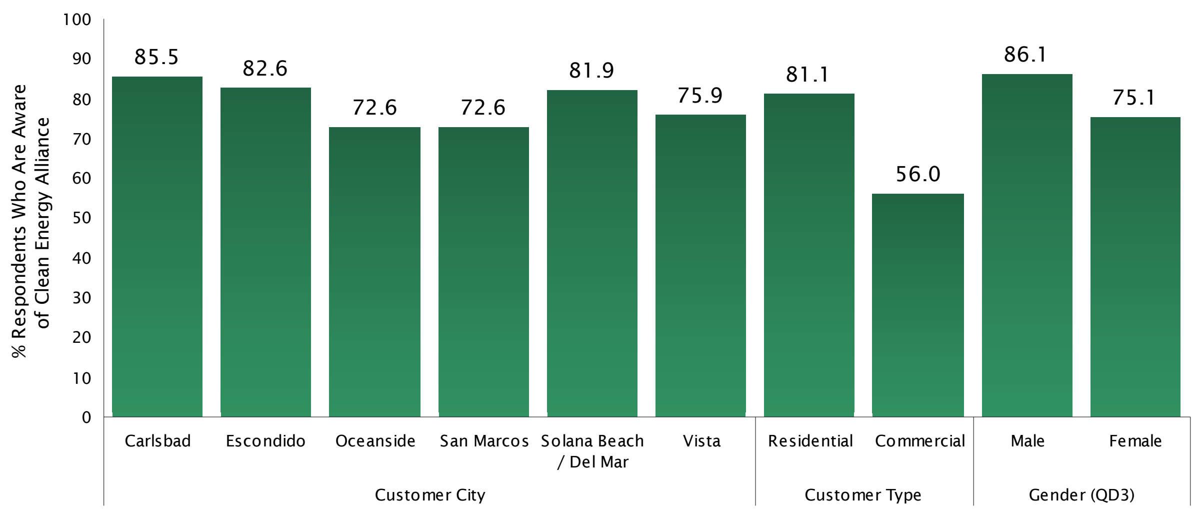


FIGURE 25 AWARENESS OF CLEAN ENERGY ALLIANCE BY CLEAN ENERGY ALLIANCE BY ETHNICITY & HOUSEHOLD INCOME

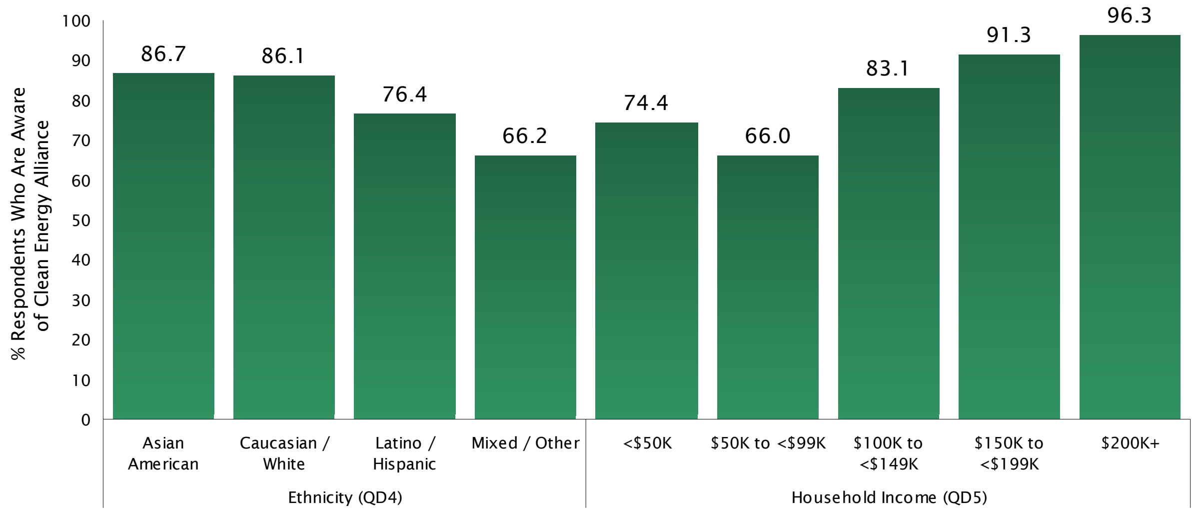
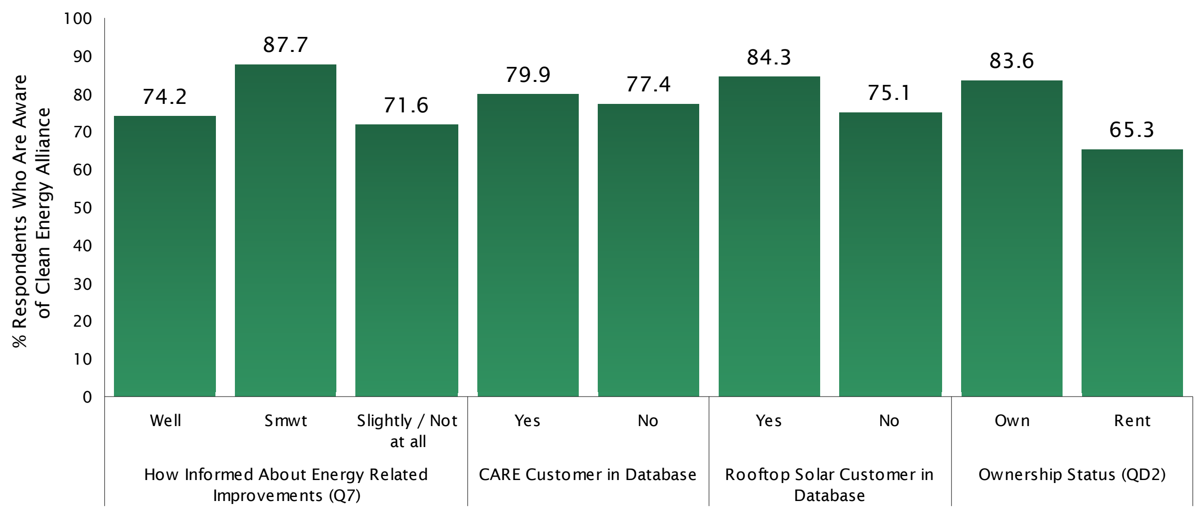


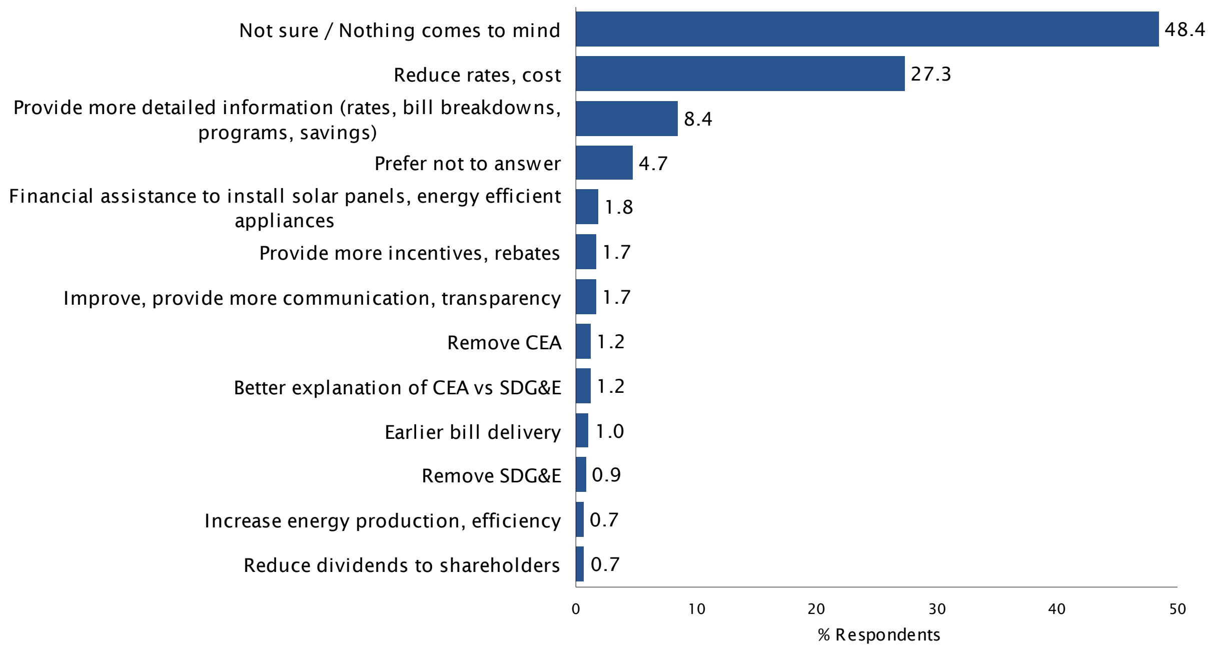
FIGURE 26 AWARENESS OF CLEAN ENERGY ALLIANCE BY CLEAN ENERGY ALLIANCE BY HOW INFORMED ABOUT ENERGY RELATED IMPROVEMENTS, CARE CUSTOMER IN DATABASE, ROOFTOP SOLAR CUSTOMER IN DATABASE & OWNERSHIP STATUS



SUGGESTIONS ON HOW CEA CAN BETTER SERVE The final substantive question of the survey asked customers if they had any suggestions for how Clean Energy Alliance could better serve them/their business. Presented in an open-ended manner, respondents were at liberty to mention any improvement that came to mind without being prompted by or limited to a list of options. True North subsequently reviewed the verbatim comments and grouped them into the categories shown in Figure 27 on the next page. More than half of respondents did not have a suggestion for improvement (48%) or preferred to not answer the question (5%). Among the specific suggestions, reducing rates/costs was the most common (27%), followed by providing more detailed information to customers on topics like rates, bill breakdowns, programs, and savings (8%), and financial assistance for solar panels, energy efficient appliances (2%) or in general (2%).

Question 17 *If the Clean Energy Alliance could do one thing to better serve you/your business, what would that be?*

FIGURE 27 ONE THING CEA COULD DO TO BETTER SERVE CUSTOMERS



Background & Demographics

Table 43 Demographics of Sample

Total Respondents	*509*
Home Type (Q8)	
Single family	50.1
Apartment	15.5
Condo / Townhome	16.9
Mobile home	2.9
Prefer not to answer	14.6
Age (QD1) *Residential only*	
Under 45	15.0
45 to 54	13.2
55 to 64	8.4
65 or older	28.7
Prefer not to answer	34.8
Ownership Status (QD2)	
Own	65.1
Rent	29.9
Prefer not to answer	5.1
Gender (QD3) *Residential only*	
Male	48.3
Female	46.3
Other	1.3
Prefer not to answer	4.1
Ethnicity (QD4) *Residential only*	
Asian American	5.4
Caucasian / White	32.0
Latino / Hispanic	27.2
Mixed / Other	6.0
Prefer not to answer	29.3
Household Income (QD5) *Residential only*	
<$50K	19.3
$50K to <$99K	15.6
$100K to <$149K	14.4
$150K to <$199K	8.9
$200K+	12.3
Prefer not to answer	29.6
Employees at Worksite (QD6) *Commercial only*	
0	5.8
1 to 2	22.2
3 to 5	21.7
6 to 10	13.2
More than 10	31.9
Prefer not to answer	5.3
Customer Type	
Residential	87.5
Commercial	12.5
Customer City	
Carlsbad	18.4
Escondido	20.8
Oceanside	25.9
San Marcos	14.8
Solana Beach / Del Mar	3.8
Vista	16.2
CARE Customer in Database	
Yes	22.8
No	77.2
Rooftop Solar Customer in Database	
Yes	31.4
No	68.6

Table 43 presents the key demographic and background information collected during the survey. The primary motivation for collecting the information was to provide a better insight into how results of the substantive questions of the survey vary by customer characteristics, as well as ensure that the sample aligns with CEA's customer database on key characteristics.

METHODOLOGY

The following sections outline the methodology used in the study, as well as the motivation for using certain techniques.

QUESTIONNAIRE DEVELOPMENT Dr. McLarney of True North Research worked closely with Clean Energy Alliance to develop a questionnaire that covered the topics of interest and avoided many possible sources of systematic measurement error, including position-order effects, wording effects, response-category effects, scaling effects, and priming. Several questions included multiple individual items. Because asking items in a set order can lead to a systematic position bias in responses, items were asked in random order for each respondent.

Some questions asked in this study were presented only to a subset of respondents. For example, only respondents who indicated they live in an apartment or mobile home (Question 8) were asked if their community has solar panels (Question 12) and electric vehicle chargers (Question 13). The questionnaire included with this report (see *Questionnaire & Toplines* on page 42) identifies the skip patterns used during the interview to ensure that each respondent received the appropriate questions.

PROGRAMMING, PRE-TEST & TRANSLATION Prior to fielding the survey, the questionnaire was CATI (Computer Assisted Telephone Interviewing) programmed to assist interviewers when conducting the phone interviews. The CATI program automatically navigates the skip patterns, randomizes the appropriate question items, and alerts interviewers to certain types of keypunching mistakes should they happen during the interview. The survey was also programmed into a passcode-protected online survey application to allow online participation for sampled residents. The integrity of the questionnaire was pre-tested internally by True North and by dialing into random homes in CEA's service area prior to formally beginning the survey. The final residential customer questionnaire was also professionally translated into Spanish to allow for data collection in English and Spanish.

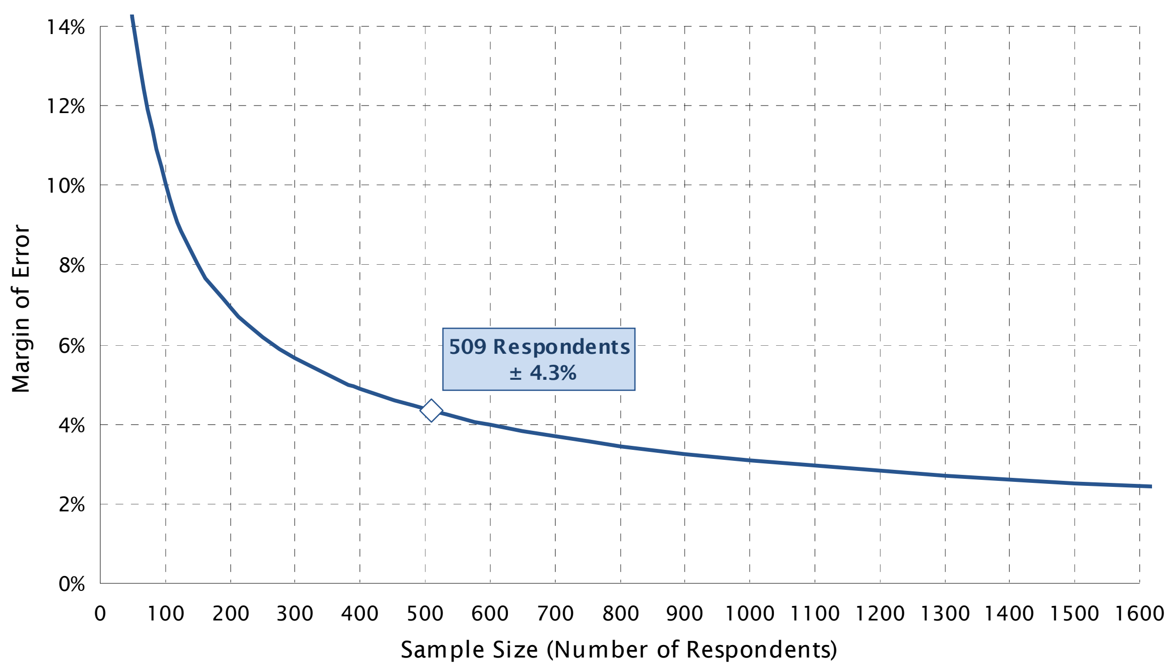
SAMPLE, RECRUITING & DATA COLLECTION Starting with a comprehensive list of residential and commercial customers provided by CEA, True North stratified by member city and account type (residential vs. commercial) to ensure a proportional sample on these dimensions. Customers were then randomly selected within their appropriate strata. Once selected for inclusion in the study, customers were initially invited to participate in the survey online at a secure, passcode-protected website designed and hosted by True North. Customers were recruited using email invitations and text invitations, and each was assigned a unique passcode to ensure that only CEA customers who received an invitation could access the online survey site, and that the survey could be completed only one time per passcode. Email reminder notices were also sent to encourage participation among those who had yet to take the survey. Following a period of online data collection, True North placed calls to land lines and cell phone numbers of residential and commercial customers that had yet to participate in the online survey.

Telephone interviews averaged 16 minutes in length and were conducted during weekday evenings (5:30PM to 9PM) and on weekends (10AM to 5PM) for residential customers, and from 9AM to 5PM weekdays for commercial accounts. A total of 509 surveys were completed among residential (445) and commercial (64) customers between April 9 and April 18, 2025

MARGIN OF ERROR DUE TO SAMPLING The results of the survey can be used to estimate the opinions of all CEA customers. Because not every customer in CEA's service area participated in the survey, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found in the survey of 509 customers for a particular question and what would have been found if all 261,826 CEA customers had been interviewed.

Figure 28 provides a plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response. For this survey, the maximum margin of error is ± 4.3% for questions answered by all 509 respondents.

FIGURE 28 MAXIMUM MARGIN OF ERROR



Within this report, figures and tables show how responses to certain questions varied by demographic characteristics such as age of the respondent, home ownership status, and account type. Figure 28 is thus useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

DATA PROCESSING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing verbatim responses, weighting the data to make minor adjustments to the sample profile, and preparing frequency analyses and crosstabulations.

ROUNDING Numbers that end in 0.5 or higher are rounded up to the nearest whole number, whereas numbers that end in 0.4 or lower are rounded down to the nearest whole number. These same rounding rules are also applied, when needed, to arrive at numbers that include a decimal place in constructing figures and tables. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and charts for a given question. Due to rounding, some figures and narrative include numbers that add to more than or less than 100%.

Questionnaire & Toplines

TRUE NORTH RESEARCH

Clean Energy Alliance Survey
Final Toplines (n=509)
April 2025

Section 1: Introduction to Study

Hi, may I please speak to: _____. Hi, my name is _____ and I'm calling from TNR on behalf of the Clean Energy Alliance, your household's/business' electricity provider. We're conducting a survey of customers about important electricity-related issues and would like to get your opinions.

If needed or doesn't recognize Clean Energy Alliance: The City of <city name> joined with several other North County cities to form the Clean Energy Alliance. Although SDG&E delivers electricity to your home/business and manages billing, the energy your household/business receives is purchased by the Clean Energy Alliance directly from energy suppliers or generated locally.

Section 2: Importance of Issues

Q1	To begin, what would you say is the *most* important issue or challenge facing your community today? Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Nothing comes to mind	25%
	High cost of living, affordability	20%
	High cost of electricity	11%
	Government / Political issues	9%
	High utility rates	5%
	Climate change / Environmental issues	4%
	Housing availability, affordability	4%
	Economy	3%
	Homelessness	3%
	Inflation	2%
	Traffic	2%
	Public safety	2%
	Infrastructure	2%
	Availability, cost of insurance	2%
	No issues / Everything is fine	2%
	Immigration issues	1%
	High taxes	1%
	Power outages / Grid concerns	1%
	Water concerns	1%

Q2	Next, I'm going to read a list of specific issues. For each one, please tell me how concerned you are about the issue. Here is the (first/next) issue: _____. Would you say you are very concerned, somewhat concerned, slightly concerned, or not at all concerned about this issue?					
	Randomize. Split Sample B1/B2, C1/C2	Very concerned	Somewhat concerned	Slightly concerned	Not at all concerned	Prefer not to answer
A	Cost of living in general	73%	18%	7%	1%	0%
B1	Paying for essentials like food, gas, and electricity	61%	21%	11%	7%	0%
B2	Cost of electricity	68%	22%	6%	4%	0%
C1	Climate change	46%	23%	8%	22%	1%
C2	Greenhouse gas emissions	33%	34%	15%	15%	4%
D	Air pollution	38%	32%	20%	10%	0%
E	Protecting the environment	55%	20%	19%	6%	0%
F	Traffic congestion	38%	37%	18%	7%	0%
G	The pace of construction and development	22%	33%	26%	17%	2%
H	Addressing homelessness	46%	29%	15%	10%	1%

Section 3: Electricity Issues & Priorities

Q3	Turning now to the topic of **energy**, I'm going to read a list of specific issues. For each one, please tell me how important this issue is to you/your business. Here is the (first/next) issue: _____. Do you think this issue is extremely important, very important, somewhat important, or not at all important?						
	Randomize	Extremely important	Very important	Somewhat important	Not at all important	Not sure	Prefer not to answer
A	Creating good-paying jobs in the energy sector	23%	29%	29%	15%	2%	3%
B	Reducing your home's/business' energy costs	55%	26%	15%	4%	0%	0%
C	Receiving a discount on your energy bill if you use less energy during peak periods	44%	24%	20%	8%	2%	2%
D	Addressing climate change by reducing greenhouse gas emissions	35%	28%	20%	13%	2%	1%
E	Having cleaner air to breathe in your home/building	50%	27%	17%	4%	1%	1%
F	Ensuring that low-income households and underserved populations have the same opportunities to transition to clean energy	32%	31%	22%	13%	2%	1%
G	Generating more electricity *locally* through rooftop solar and other small installations	37%	27%	22%	8%	4%	2%
H	Avoiding power outages at your home/business	43%	31%	17%	6%	0%	2%

Q4	Next, I'm going to read a short list of actions that could be taken in the future. As I read each item, please indicate whether you think it should be a high priority, medium priority, or low priority for your community. If you think the action shouldn't be taken, please indicate so. Also, please keep in mind that not all items can be high priorities. Here is the (first/next) one: _____. Should this be a high, medium, or low priority for the future – or should we not take this action?						
	Randomize	High priority	Medium priority	Low priority	Should NOT take this action	Not sure	Prefer not to answer
A	Requiring all new construction to be **all-electric** to improve indoor air quality	22%	24%	20%	25%	7%	2%
B	Increasing the number of **electric cars, trucks, and buses** to reduce greenhouse gas emissions and air pollution	28%	28%	25%	12%	4%	3%
C	Improving the reliability of energy supplies by building **large-scale renewable energy generating systems** locally in the San Diego region	39%	34%	14%	6%	6%	2%
D	Installing more **small-scale renewable energy** systems like solar on home/small business rooftops and parking lots	40%	36%	14%	5%	3%	2%
E	Improving the **energy efficiency of buildings** so they use less energy and have lower energy bills	50%	33%	12%	3%	1%	2%
F	Providing **job training and certification programs** to fill the need for skilled workers in the clean energy sector	38%	38%	14%	6%	2%	1%
G	Helping **low-income families** pay their energy bills	41%	24%	22%	10%	1%	1%
H	Improving access to technical experts who can **advise on energy saving projects** in the home/for businesses	24%	34%	31%	7%	3%	2%
I	Creating more **back-up power** systems that can operate during a power outage	41%	39%	15%	3%	1%	1%
J	Increasing the number of **public access charging stations** for electric vehicles	26%	25%	32%	10%	4%	2%
K	**Incentivizing** customers to better manage energy use during high-demand periods	39%	35%	17%	5%	2%	2%
L	**Upgrading the electric grid and infrastructure,** including undergrounding utility wires, expanding grid capacity, and replacing outdated equipment	60%	25%	9%	0%	3%	2%
M	**Streamlining** the process and shortening the time it takes to connect new solar, back-up batteries, and other renewable energy projects to the grid.	34%	38%	16%	2%	8%	2%

Q5	Is there an energy-related project or program *not* previously mentioned that you think should be a high priority for your community? *If yes, ask:* Please briefly describe it to me. Verbatim responses recorded and later grouped into categories shown below.	
	No other high priorities / Nothing comes to mind	75%
	Reduce electricity rates, bills	7%
	Program to retrofit roof for solar panels	4%
	Prefer not to answer	3%
	Pursue nuclear energy resources	2%
	Educate customers about electricity, usage in general	1%
	Improve, provide battery storage, backup	1%
	Support community solar, backup, energy efficiency efforts	1%
	Pursue more wind, hydroelectric power resources	1%
	Pursue geothermal energy resources	1%
	Improve, address fire prevention measures	1%
	Provide incentives for solar, energy efficiency efforts	1%

Section 4: Energy Improvements & Programs					
Q6	Next, I'm going to read a list of energy improvements that can be made to a home/building. For each, please say 'yes' if your current home/business's building has this improvement – 'no' if not.				
	Randomize	Yes	No	Not sure	Prefer not to answer
A	Electric vehicle charging station	21%	73%	3%	3%
B	An electric furnace	20%	66%	12%	2%
C	An electric stove	26%	71%	2%	1%
D	An electric heat pump water heater	22%	62%	14%	2%
E	Solar panels	44%	50%	5%	1%
F	Back-up battery storage	18%	69%	11%	2%
G	Improved insulation, windows, roof, or other weatherization improvements	55%	34%	8%	2%
H	Energy efficient lighting	78%	13%	8%	1%

I	Smart home energy/Building management system that monitors, controls heating/air conditioning, lighting, appliances to optimize performance, reduce energy use	43%	45%	10%	2%
Q7	In general, how informed do you feel about the programs and services that are available to help residents/businesses with energy-related improvements? Would you say you feel well informed, somewhat informed, slightly informed, or not at all informed?				
	1 Well informed	15%			
	2 Somewhat informed	38%			
	3 Slightly informed	32%			
	4 Not at all informed	14%			
	98 Not sure	0%			
	99 Prefer not to answer	1%			
Q8	So that I can limit the following questions to just those that apply to your home, which of the following best describes your current home? *(asked of residents only)*				
	1 Single family detached home	57%			
	2 Apartment	18%			
	3 Condominium or Townhome	19%			
	4 Mobile home	3%			
	99 Prefer not to answer	2%			
Q9	As I read the following list of programs that may be available in your community, please indicate if you were **aware** of the program's existence prior to taking the survey. Here is the (first/next) one: _____.				
	Randomize	Yes, was aware	No, was not aware	Not sure	Prefer not to answer
	All respondents receive items A-F.				
A	**Discounted rates** for energy used during off-peak hours	79%	18%	2%	1%
B	Programs that allow customers who are unable to install solar to receive **renewable energy generated elsewhere**	23%	66%	9%	2%
C	Free **energy audits** and **technical assistance** on how to improve your household's/business' energy efficiency and lower bills	44%	47%	7%	2%
D	Rebates and incentives to install energy efficient **lighting**, **appliances**, and **equipment**	44%	47%	7%	2%
E	Discounted rates for **low-income** households *(asked of residents only)*	67%	27%	5%	1%
F	Discounted rates for those who have **medical equipment** in their home *(asked of residents only)*	44%	47%	7%	2%

	Only ask items G-J if Q8=(1,3)				
G	Rebates and incentives to **replace gas appliances** and equipment with electric appliances and equipment	31%	63%	5%	1%
H	Rebates and incentives to install **electric vehicle charging equipment**	35%	56%	6%	2%
I	Rebates and incentives to make **energy-efficiency improvements to your home/business' building**, such as improved insulation and windows	46%	48%	5%	1%
J	Rebates and incentives to install **solar panels and battery storage**	61%	32%	6%	1%

Q10	For the same list of programs, please indicate how **interested** your household/business would be in participating in the program. If your household/business is *already* participating in the program, please indicate so. Here is the (first/next) one: _____. Would you be very interested, somewhat interested, or not interested in participating in this program?						
	Randomize	Very interested	Somewhat interested	Not interested	Already participating	Not sure	Prefer not to answer
	All respondents receive items A-F.						
A	**Discounted rates** for energy used during off-peak hours	42%	19%	14%	20%	2%	2%
B	Programs that allow customers who are unable to install solar to receive **renewable energy generated elsewhere**	17%	21%	44%	6%	7%	4%
C	Free **energy audits** and **technical assistance** on how to improve your household's/business' energy efficiency and lower bills	26%	29%	32%	6%	5%	3%
D	Rebates and incentives to install energy efficient **lighting**, **appliances**, and **equipment**	35%	29%	21%	8%	4%	3%
E	Discounted rates for **low-income** households *(asked of residents only)*	23%	12%	52%	5%	4%	4%
F	Discounted rates for those who have **medical equipment** in their home *(asked of residents only)*	15%	11%	63%	5%	3%	4%
	Only ask items G-J if Q8=(1,3)						
G	Rebates and incentives to **replace gas appliances** and equipment with electric appliances and equipment	17%	24%	46%	4%	6%	2%
H	Rebates and incentives to install **electric vehicle charging equipment**	14%	16%	58%	5%	3%	2%
I	Rebates and incentives to make **energy-efficiency improvements to your home/business' building**, such as improved insulation and windows	30%	31%	28%	7%	2%	2%

J	Rebates and incentives to install **solar panels and battery storage**	23%	26%	31%	13%	5%	3%

Ask Q11 if Q9=1 AND Q10=(1,2) for any item A-J. Otherwise skip to instruction preceding Q12.

Q11	You mentioned your household/business would be interested in participating in certain energy programs, but has yet to do so. Is there a particular obstacle or reason keeping you from participating? *If yes, ask:* Please briefly describe the reason to me. Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / No particular reason	48%
	Cost	13%
	Renter, landlord will not allow	8%
	Not enough need, interest at the moment	7%
	Need more information	4%
	Was not aware, not sure how to participate	4%
	Prefer not to answer	4%
	Lack of time	3%
	Financial issues	2%
	Do not qualify	2%
	Already participated, upgraded	2%
	HOA issues	2%
	Due to age of property	1%
	Contacted CEA but no timely response	1%
	Concerns, doubts about saving money	1%

Ask Q12 & Q13 if Q8=(2,4). Choose home type based on Q8 answer. Otherwise skip to Q14.

Q12	Does your <<apartment | mobile home>> community have **solar panels**? *(asked of residents only)*		
	1	Yes	26%
	2	No	66%
	98	Not sure	8%
	99	Prefer not to answer	0%
Q13	Does your <<apartment | mobile home>> community have **electric vehicle chargers**? *(asked of residents only)*		
	1	Yes	8%
	2	No	90%
	98	Not sure	2%
	99	Prefer not to answer	0%

Section 5: Communication						
Q14	Which of the following would you say is your **primary** source for information about local events and programs? *Ask items 1-5 in random order.*					
	1	Newspapers	9%			
	2	Television	20%			
	3	Radio	3%			
	4	Internet, not including Social Media	43%			
	5	Social Media	14%			
	6	None/Don't pay attention to local events and programs	6%			
	98	Not sure	3%			
	99	Prefer not to answer	1%			

Q15	As I read the following ways that the Clean Energy Alliance can communicate with customers, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for communicating with you/your business.				
	Randomize	Very	Somewhat	Not at all	Prefer not to answer
A	Email	39%	40%	19%	2%
B	Electronic Newsletters	24%	44%	30%	3%
C	Social Media like Facebook, Instagram and X	15%	30%	52%	3%
D	Clean Energy Alliance website	24%	48%	25%	2%
E	Newsletters and other materials mailed directly to your house/business	26%	43%	29%	2%
F	Automated phone calls	3%	13%	81%	2%
G	YouTube Videos	16%	39%	43%	2%
H	Text Messages	21%	31%	46%	2%
I	Utility bill inserts	26%	40%	32%	2%

Q16	Prior to taking this survey, were you aware that the energy your household/business uses is provided by the Clean Energy Alliance?		
	1	Yes	78%
	2	No	18%
	98	Not sure	3%
	99	Prefer not to answer	1%

Q17	If the Clean Energy Alliance could do *one* thing to better serve you/your business, what would that be? Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Nothing comes to mind	48%
	Reduce rates, cost	27%
	Provide more detailed information (rates, bill breakdowns, programs, savings)	8%
	Prefer not to answer	5%
	Financial assistance to install solar panels, energy efficient appliances	2%
	Improve, provide more communication, transparency	2%
	Provide more incentives, rebates	2%
	Reduce dividends to shareholders	1%
	Better explanation of CEA vs SDG&E	1%
	Increase energy production, efficiency	1%
	Remove SDG&E	1%
	Remove CEA	1%
	Earlier bill delivery	1%

Section 6: Background & Demographics			
Thank you so much for your participation. I have just a few background questions for statistical purposes.			
D1	In what year were you born? *(asked of residents only)* Year coded into age categories shown below.		
	Under 35		8%
	35 to 44		9%
	45 to 54		15%
	55 to 64		10%
	65 or older		33%
	Prefer not to answer		25%
D2	Do you own or rent your current residence/lease the building your business is in?		
	1	Own	65%
	2	Rent	30%
	99	Prefer not to answer	5%

D3	What is your gender? *(asked of residents only)*		
	1	Male	48%
	2	Female	46%
	3	Other	1%
	99	Prefer not to answer	4%
D4	What ethnic group do you consider yourself a part of or feel closest to*? (asked of residents only)*		
	1	African-American/Black	2%
	2	American Indian or Alaskan Native	<1%
	3	**Asian** -- Korean, Japanese, Chinese, Vietnamese, Indian, Filipino or other Asian	6%
	4	Caucasian/White	37%
	5	Latino/Hispanic	31%
	6	Middle Eastern	<1%
	7	Pacific Islander	1%
	8	Mixed Heritage	2%
	98	Other	1%
	99	Prefer not to answer	19%
D5	This last question is for statistical purposes only. As I read the following income categories, please stop me when I reach the category that best represents your household's total annual income before taxes. *(asked of residents only)*		
	1	Under $50,000	22%
	2	$50,000 to less than $100,000	18%
	3	$100,000 to less than $150,000	17%
	4	$150,000 or $200,000	10%
	5	More than $200,000	14%
	98	Not sure	0%
	99	Prefer not to answer	19%

D6	How many people are currently employed at your worksite? *(asked of businesses only)*	
1	0	6%
2	1 to 2	22%
3	3 to 5	22%
4	6 to 10	13%
5	More than 10	32%
98	Prefer not to answer	5%

Thanks so much for participating in this important survey! This survey was conducted for the Clean Energy Alliance.

Post-Interview & Sample Items

S1	Customer Type	
	Residential	87%
	Commercial	13%
S2	**Customer City**	
	Carlsbad	18%
	Del Mar	1%
	Escondido	21%
	Oceanside	26%
	San Marcos	15%
	Solana Beach	3%
	Vista	16%
S3	**CARE Customer in Database**	
	Yes	23%
	No	77%
S4	**Rooftop Solar Customer in Database**	
	Yes	31%
	No	69%

Appendix B – Universidad Popular Workshops Summary

Community Conversations
Let's Talk About Your Energy Needs
Community Workshops Report

Report prepared by Universidad Popular
Authors: Dr. Arcela Nuñez & Natalie Aguilar
December 21, 2025

Contents

INTRODUCTION

The **Community Conversations: Let's Talk About Your Energy Needs** is the result of a partnership between Clean Energy Alliance, Universidad Popular, and community members from across North County.

Universidad Popular was engaged by the Clean Energy Alliance to co-facilitate a series of community workshops scheduled between September and November 2025. The purpose of these sessions was to create a forum where community members could express their perspectives and contribute to shaping the direction of energy programs within CEA's service area. The structured dialogues addressed key topics, including an analysis of Community Needs Survey results, assessment of customer energy requirements and associated challenges, identification of preferred energy and energy efficiency initiatives, visions for the sector's future, and strategies for knowledge sharing.

ACKNOWLEDGEMENTS

This project was developed with community members and customers of Clean Energy Alliance in mind. More specifically, the primary goal was to reach individuals who are hard to reach and engage in civic opportunities. Numerous individuals, cities, agencies, and organizations provided invaluable expertise and input during the development of the project scope and methodology and the development of the summary report. In particular, we thank and acknowledge the following:

Clean Energy Alliance (CEA): Greg Wade, Chief Executive Officer, Rob Howard, Key Accounts/Program Manager, Kaitlin McGee, Key Accounts/Program Manager, Karen Villaseñor, Programs Analyst, Tiffany Reynolds, Key Accounts Analyst and other staff for working closely with Universidad Popular to plan, design and implement the community workshops.

Also, thank you to the Board of Directors who attended the community workshops including Katie Melendez, Chair, City of Vista Council Member, Christian Garcia, Vice Chair, City of Escondido Council Member, María Nuñez, Board Member, City of San Marcos Council Member, and David A. Zito, Alternate Board Member, City of Solana Beach Council Member.

Additionally, thank you to the Community Advisory Committee (CAC) members who attended the community workshops and shared updates and information with community members including Tracie Barham, City of Escondido, John Mosher, City of San Marcos and Daniel Dominquez, City of Oceanside.

Thank you to the cities of Escondido, San Marcos, Carlsbad, Vista, Oceanside, and Solana Beach for providing meeting space and assisting with outreach.

Universidad Popular (UP): The authors thank the UP team for overall support on this project including community outreach, education, engagement, data collection, data entry, data analysis, facilitation, and report preparation.

Interpreter: Thank you to Mario Garcia for providing interpretation services in English and Spanish during the community workshops.

Special appreciation to more than 211 participants who attendees the community workshops and shared their opinions and provided valuable input.

OVERVIEW

Beginning July 2025, Universidad Popular (UP) and Clean Energy Alliance (CEA) initiated a dialogue to assess the feasibility of conducting a series of community workshops, planning, goals, and timeline. CEA shared interest in reaching community members to hear their energy-related challenges and seek input regarding future programs, rebates, and incentives. UP provided an overview of outreach and education pedagogy and engagement strategies. After several planning meetings, UP and CEA agreed to move forward with implementation of the community workshops.

Initially, only a limited number of workshops were planned. Following the successful completion of the first two sessions and subsequent requests from community members in other cities seeking increased accessibility through local events, further in-person and virtual workshops were organized throughout CEA's service area in North County.

A Total of six (6) in-person bilingual (English/Spanish) workshops were held from September to November 2025 in the cities of Escondido, San Marcos, Carlsbad, Vista, Oceanside, and Solana Beach. Two (2) virtual workshops were also held in English and Spanish.

Table 1: Community Conversations

Date	**Location**	**# of Attendees**
9/8/25	Escondido	36
9/16/25	San Marcos	88
9/17/25	Carlsbad	19
9/24/25	Online - Spanish	7
9/24/25	Online - English	7
10/20/25	Vista	22
11/5/25	Oceanside	19
11/6/25	Solana Beach	13
Total		211

UP and CEA developed and prioritized the workshop content for the target communities. Materials developed for the workshops included a workshop guide for facilitators, community survey to assessment, and PowerPoint presentations in English and Spanish to use during the workshops. The workshop content provided introductory overviews of Universidad Popular and Clean Energy Alliance. The presentation on Universidad Popular highlighted the organization’s history, outreach and education programming, and culturally/linguistically responsive approaches. The presentation on CEA included background information about CEA’s history, service areas, Joint Powers Agency, how CEA works, key information to know as customer, energy plan options, and questions/answers regarding programs.

In addition to the general presentations, each workshop included a facilitated roundtable conversation in small groups in a primary language (English/Spanish) and provided interpretation as needed by participants. The conversation portion of the workshop provided a platform for community members to voice their opinions and provide input regarding energy programs in CEA’s service territory. Each group was led by a trained facilitator who guided the conversation in English or Spanish and a notetaker who transcribed notes. Facilitators guided the conversation through structured questions centered around the following key areas: results from the Community Needs Survey, understanding customer energy needs and identifying challenges, desired energy and energy efficiency programs, visions for the future, and existing knowledge sharing.

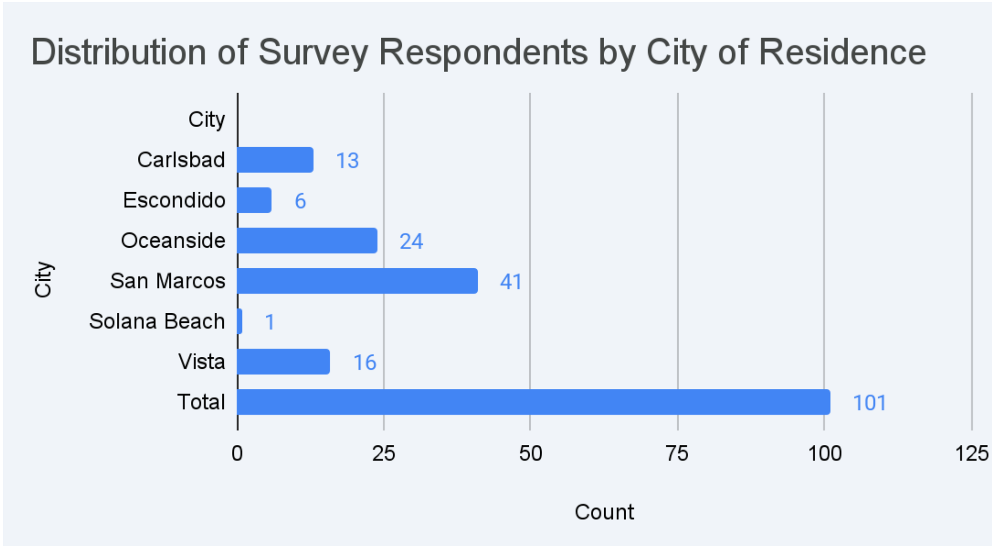
This report summarizes survey and workshop findings, key insights and feedback by session.

OVERALL SURVEY RESULTS

Workshop participants were asked to complete a brief survey reporting on what city they live in, whether they rent or own their home, whether they are business owners and if so, what city their business is in and if they are CEA customers. A total of 101 (N=101) surveys were collected. Below is a summary of responses:

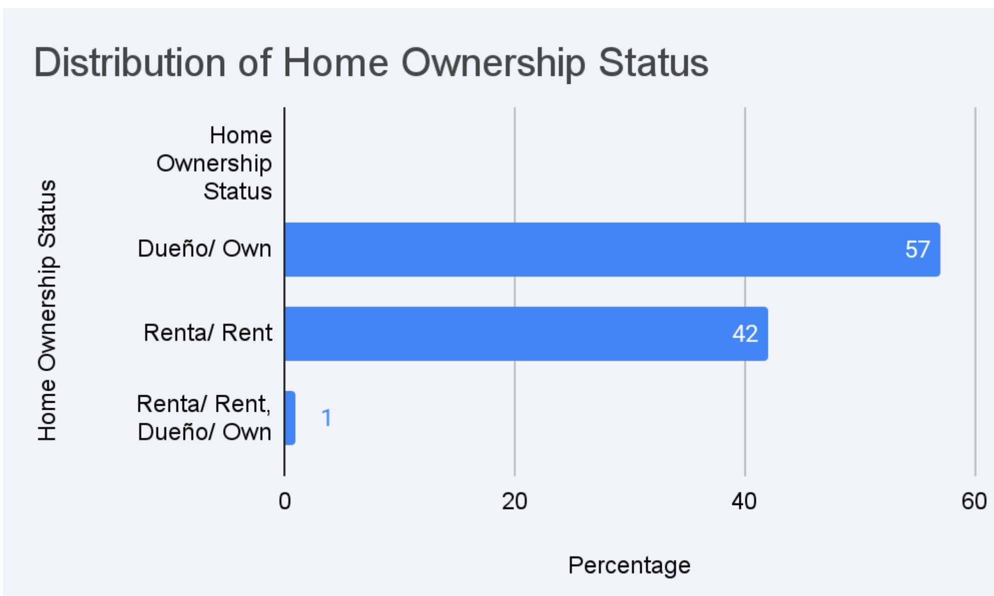
Survey respondents reported living in Carlsbad, Escondido, San Marcos, Solana Beach, and Vista.

Figure 1: Survey Respondents by City of Residence



Most survey respondents reported owning their homes (N=57) and 42 participants are renters.

Figure 2: Distribution of Home Ownership versus Renters



SUMMARY OF INPUT FROM COMMUNITY WORKSHOPS

Section 1: Understanding Customer Priorities

Workshop participants were provided with the following explanation and questions to understand factors that matter most to consumers and the priority that most influences their decisions around energy use.

When it comes to energy, people value different things. Some might focus on keeping costs low, while others care more about environmental impacts or having reliable service. These questions help us understand what matters most to you when it comes to energy.

a) *When thinking about energy, what matters most to you? For example:*
   - *Affordability: How much energy costs.*
   - *Sustainability: Using energy in ways that protect the environment. Reliability: Having consistent access to energy without frequent outages.*
   - *Access: Being able to get energy and participate in programs.*
   - *Other*

b) *Which priority most influences your decisions around energy use?*

Response Summary for Section 1: Customer Priorities

Affordability emerged as the leading priority among participants across all cities.

Table 2: Customer Priorities	
Escondido Workshop	In Escondido, participants expressed a pronounced interest in saving money and voiced concerns regarding excessive costs. Community members requested additional information and educational resources about CEA programs, with particular emphasis on resources for renters. Concerns were also raised about the reliability of older appliances and their energy consumption, potential fraud associated with solar energy, and there was evident interest in solar solutions.
San Marcos Workshop	The primary concern among community members in San Marcos centered on cost, including themes of financial savings and increasing expenses. One group advised interest in learning more about energy-efficient appliances, while another indicated insufficient knowledge about clean energy, though they acknowledged its relevance and the need for further information. Participants described efforts to reduce energy use, such as turning off appliances, switching off lights, turning off the television, and operating washing machines during nighttime hours. Another group highlighted that residents of

	mobile homes often lack access to billing or the ability to make enrollment decisions independently.
Carlsbad Workshop	Both discussion groups in Carlsbad underscored the importance of cost reduction, along with other priorities such as affordability, sustainability, reliability, and access. Additional feedback included skepticism towards supporting shareholders and suggestions to explore small-scale wind energy options.
Online Workshop – English	Participants emphasized the significance of understanding various energy sources and discussed environmental justice issues.
Online Workshop – Spanish	Priorities identified by participants included cost management, reducing energy consumption, clean energy adoption, and family well-being.
Vista Workshop	All three discussion groups in Vista ranked cost as the principal concern. Specific comments included apprehension about rising expenses and references to substantial monthly bills (e.g., $1,030 for one business owner). The business group also noted a desire for clearer billing and highlighted clean energy and solar support as organizational priorities, although assistance is needed.
Oceanside Workshop	Cost and escalating energy prices were consistent concerns across all three discussion groups in Oceanside. While sustainability, reliability, and access were acknowledged, one group remarked that prohibitive costs limit capacity to engage with these issues. Reported monthly bills ranged from $85 to $255. Some participants avoid using lights between 4 to 9 pm to manage costs. Recommendations included hosting more workshops at libraries and schools, distributing information via bill inserts, and increasing program promotion through social media and email.
Solana Beach Workshop	Although the City of Solana Beach has set an objective for 100% renewable electricity, the predominant concern remains cost and affordability, with balancing expense and renewable priorities being a key issue. Reliability is crucial, particularly for individuals with medical needs; one participant experienced an eight-hour outage resulting in food loss. Reliable AC and heating systems were also cited as important. Additionally, time-of-use factors have a significant influence on energy consumption decisions.

Summary of Customer Priorities

Across all workshops, affordability was identified as the top priority for participants when it comes to energy use. Concerns about excessive costs were prevalent in every city, with additional interests in energy efficiency, reliability, sustainability, and access to programs. Many participants expressed a need for more information and resources, especially for renters, and highlighted issues related to older appliances and challenges with clean energy adoption. Reliability and time-of-use were noted as important considerations, particularly for those with medical needs or high energy bills.

Section 2: Identifying Energy-Related Issues and Barriers

Workshop participants were provided with the following explanation and questions to understand factors the types of barriers customers face when it comes to energy at home or in their business. They were also asked if they have considered making improvements to reduce energy use or to name specific barriers that prevent them from making energy improvements.

Whether you're a homeowner, renter or business owner, energy use can come with challenges. The following questions help us understand what types of barriers you face when it comes to energy.

a) *What are the biggest challenges you face when it comes to energy use at home or in your business? For example, high bills, outdated equipment that is not energy efficient, limited control on energy choices due to renting or inconsistent service.*
b) *Have you considered making energy improvements in your household? Are you able to? (renter vs. homeowner vs. business) For example, upgrading insulation, installing solar panels, switching to energy-efficient appliances.*
c) *Are there specific barriers that prevent you from making energy improvements? For example, cost of upgrades, lack of information, limited access to technology or not knowing your options.*

Response Summary for Section 2: Energy-Related Issues and Barriers

Participants identified several barriers to energy improvements, including tenancy status, high energy costs, outdated appliances, insufficient financial resources, unfamiliarity with available programs and technologies, and limited knowledge about innovation.

Table 3: Energy-Related Issues and Barriers	
Escondido Workshop	Community members cited renting as a significant obstacle to implementing household energy upgrades. The quality and efficiency of appliances for renters is dependent on the landlords and leasing companies. Additionally, qualifying for low-income assistance programs was described as challenging. Aging infrastructure contributed to excessive energy consumption, and replacing or

	servicing appliances such as pipes and air conditioning units in multi-family housing was deemed expensive. Concerns regarding solar installations included lengthy permitting processes, elevated costs, inadequate insurance coverage, and insufficient information. Further barriers noted were escalating utility bills, limited technological literacy, uncertainty about available options, and the necessity to disconnect certain appliances. Interest in window replacement was expressed, and one member reported an annual energy bill of $5,000.
San Marcos Workshop	Key challenges included high energy bills relative to income levels, lack of insulation, absence of air conditioning and heating, and minimal impact from window upgrades. Renters indicated that their options are subject to landlord decisions regarding temperature control, cable inspections, and appliance replacements. Old appliances remain prevalent and inefficient; although participants showed interest in upgrading, there is a need for additional information. Some members expressed interest in solar panels and window upgrades but highlighted concerns about affordability and limited information. Groups also reported financial and time constraints associated with making upgrades. Despite apartment complexes installing solar panels, residents sometimes pay more than they consume and are enrolled in CARE programs. Other issues raised included insufficient follow-through on SDGE programs, costly roof replacements required for solar, and confusion over Tesla technology and CEA enrollment. Routine energy-saving behaviors, such as turning off refrigerators and lights, were mentioned.
Carlsbad Workshop	Identified obstacles included costs related to energy usage and equipment such as air conditioners and heaters, limited awareness of CEA and government programs, older homes not suited to electrification, and the need for insulation and battery upgrades. The suggestion to permit portable solar panels was made. English-speaking participants expressed interest in electric vehicles, solar chargers, foam insulation, and energy-efficient appliances, though uncertainty existed around contacting professionals concerning batteries. To mitigate expenses, some avoid running air conditioning.
Online Workshops — English & Spanish	A lack of information regarding CEA and its programs emerged as a predominant barrier. In the Spanish session, summer cooling costs and trust in organizations were additional challenges, alongside support requirements for completing applications.
Vista Workshop	Participants highlighted difficulties related to landlord-controlled outdated equipment, complex integrated systems, paperwork challenges for homeowners, architectural limitations, and user-

	unfriendly automatic controls. One participant reported inadequate follow-up on program outreach. Institutional energy limits also restrict business capabilities, as noted by a local nursery owner. Recommendations included introducing resource programs for home upgrades and establishing a community office to provide guidance.
Oceanside Workshop	Energy costs were a common challenge, with reports of overcharging for gas and electricity and experiences of excessive payments despite having solar panels. Community members expressed interest in reducing their carbon footprint, efficiently checking appliances to save energy without additional costs, and receiving more information about CEA programs. Some groups stated reluctance to rely on SDGE for price reductions.
Solana Beach Workshop	Challenges included navigating landlord relationships as renters, difficulties in accessing upgrades due to various management layers, and lack of notification or involvement in upgrade planning. Questions concerning the benefits of renewables were raised. Older homes present ongoing challenges; residents frequently cite inability to upgrade to energy-efficient appliances. Insufficient information about battery chargers was identified, as was the need for better communication at point of sale for electric vehicles. Panel upgrades required for advanced chargers were described as an additional barrier. Participants also indicated skepticism about the effectiveness of equipment changes, noting a demand for consistent performance evidence.

Summary of Energy-Related Issues and Barriers
Across workshops, participants cited high energy costs, outdated and landlord-controlled appliances, and financial constraints as major barriers to improving energy usage. Many renters felt limited by their tenancy status, while others noted a lack of information, difficulty qualifying for assistance programs, and challenges with technology or program enrollment. Additional obstacles included expensive upgrade requirements (such as for solar panels), architectural limitations, skepticism about the benefits of new equipment, and a need for better communication and support regarding energy programs and technologies.

Section 3. Understanding Energy Usage and Decision-Making

Workshop participants were provided with the following explanation and questions to understand the way people make decisions about energy and the tools they have and use that motivate them. This discussion helps to understand how familiar individuals are with their bills and whether they are tracking their energy use.

The way people make decisions about energy can depend on what we know, what tools we have and what motivates us. With this set of questions, we want to understand how familiar you are with tracking your energy use and what motivates you to make changes.

a) *Do you know how to track your energy use?*
b) *If you do know how to track your energy, what methods do you use to track it? For example, checking your monthly paper or online bill, reading your meter, using smart apps or monitoring specific appliances.*
c) *What motivates you to reduce energy use or invest in clean energy solutions? For example, saving money, helping the environment, improving comfort at home or increasing property value.*

Response Summary for Section 3: Energy Usage and Decision-Making
Few individuals are familiar with the details of their energy bills, and even fewer actively monitor their energy consumption.

Table 4: Energy Usage and Decision-Making	
Escondido Workshop	Most discussion groups acknowledged a lack of awareness regarding peak hours, and many reported not knowing how to track their energy use. One participant remarked that their busy lives make it difficult to review bills, resulting in limited understanding of the relationship between usage and cost. Some participants expressed interest in learning how to read their bill, reduce costs, and explore options such as hybrid vehicles. In some instances, payment responsibilities fall to other family members. Suggestions to improve access included the development of an efficient and user-friendly app for tracking billing and energy information, as well as providing a dedicated phone line for assistance. Key motivators included low costs, environmental concerns, community considerations, and interest in electric vehicles. Awareness of programs like CARE/FERA was noted in some groups, while others were unaware of the broader impacts of energy use.
San Marcos Workshop	Half of the discussion groups tracked their energy use via their energy bill, with others using online reviews, brief bill checks, or identifying no alternate means. Three groups were unfamiliar with methods for monitoring consumption and did not understand the connection between meter readings, bills, and cost. A subset reported practicing energy-saving behaviors during peak hours, turning off appliances, air-drying laundry, minimizing lighting use, or utilizing laundromats. There was a perception among some that businesses benefit from lower rates than residents. Cost savings were identified as the primary motivation, with some groups requesting additional

	information about the environmental impacts of energy use. Barriers to upgrades included confusing information and apprehension about ineffective investments. Information needs centered on saving energy, reading bills, and leveraging technology.
Carlsbad Workshop	In one group, only one of four participants understood how to track energy use. Recommendations included funding community organizations to provide education about available programs. Other methods used for tracking included spreadsheets, bill reviews, and solar apps. Environmental protection was cited as the top motivation for reducing energy consumption, alongside increasing property values.
Online Workshops - English	Participants requested more information about SDG&E's roles, products, discounts such as CARE/FARE, differences in energy offerings, and training on bill structure to promote behavior change. Family-centered education was suggested to support engagement where men often manage household bills.
Online Workshop - Spanish	Attendees generally indicated they were only able to track energy use via their utility bill.
Vista Workshop	Most participants tracked their energy consumption through either paper or online billing statements. Additional tracking tools included applications, websites, and using sleep timers on electronics. Motivations for reducing energy use included decreasing costs, supporting a better future and environment, reducing public safety power shutoffs, and preventing wildfires.
Oceanside Workshop	Some groups lacked knowledge on how to track energy usage or their participation status with CEA. Time constraints were cited as a barrier to reviewing bills. However, in one group, all five participants used their SDGE statement (online or paper) to monitor consumption. Motivation included environmental benefits and cost reduction. Participants desired resources on reading bills, receiving information via text, and learning to read meters. An app was recommended for sharing relevant information.
Solana Beach Workshop	This group was largely knowledgeable about tracking energy use. Reliability and outage concerns motivated some to invest in solar panels. Participants cited cost, affordability, and environmental stewardship as driving factors for adopting clean energy solutions. Interest was also expressed in home upgrades, supported by financing options such as GoGreen Financing, which participants found effective in improving efficiency.

Summary of Energy Usage and Decision-Making
Most workshop participants demonstrated limited familiarity with their energy bills, and few actively tracked their energy usage. Tracking methods varied, with some using paper or online billing statements, apps, or spreadsheets, while others lacked awareness of how to monitor consumption. Key motivations for reducing energy use included saving money, environmental protection, and increasing comfort or property value. Barriers to effective decision-making involved confusing information, time constraints, and skepticism about the benefits of energy upgrades. Participants expressed a desire for improved resources, such as user-friendly apps and educational support, to help them better understand and manage their energy consumption.

Section 4. Exploring Past and Future Energy Improvements

Workshop participants were provided with the following explanation and questions to understand what type of energy-related projects individuals have prioritized or are considering for the future. This can help CEA determine program prioritization.

Understanding what type of energy-related projects you have prioritized or are considering for the future can help CEA determine program prioritization. These questions will help us learn what improvements you've made and what resources would be helpful for projects you're considering.

a) *Have you made any energy-related upgrades to your home or business (e.g., LED lighting, insulation, solar panels)?*
b) *If you are considering improvements for the future, what support or resources would help you take the next step?*

Response Summary for Section 4: Past and Future Energy Improvements
Workshop participants consistently prioritized energy-focused initiatives, including upgrading to LED lighting, installing solar panels, and improving insulation.

Table 5: Past & Future Energy Improvements	
Escondido Workshop	Participants noted successful upgrades such as LED lights and solar-powered lightbulbs. Mobile homeowners expressed interest in solar panels with battery systems, and other community members shared ongoing installation efforts. Recommended programs included workshops led by staff to address individual needs, informational text messages, renter-friendly initiatives, electronic recycling programs, and events like a "feria de focos" (light show) offering discounted

	LEDs. One discussion group suggested diverse renewable energy program options, self-installation assistance for solar panels to mitigate challenges associated with contractors, increased tax credits, financial support for repairs and home insulation, and reduced rates for low-income households. Additional delivery recommendations encompassed support with application paperwork, multilingual accessibility (English, Spanish, French), and expanded electricity-related programming. Other groups advocated for discount programs, targeted support for low-income families, and various incentives. Concerns were raised about limited information within the Latino community for accessing benefits, as well as the desire for lower energy bills and more affordable electric vehicles.
San Marcos Workshop	Community members shared energy-saving practices such as reducing television use, air drying laundry, installing LED lighting, utilizing solar panels, switching off unused lights, using fans instead of air conditioning, upgrading windows, and replacing gas stoves with induction models. Desired upgrades included appliances that consume less energy and water. Requested programs focused on window replacement assistance, cost-reducing options, alternatives to solar power, free solar panel offerings, battery purchase support, solar panel cost transparency, energy audits, individualized contract support, and educational workshops. Participants also sought information regarding energy-efficient appliances, weatherization, home insulation, and programs benefiting families with multiple children. Preferred modes of engagement included interactive presentations, door-to-door outreach, and personal explanations due to difficulties with social media platforms. Skepticism about the actual impact of solar panels on energy savings was noted, alongside barriers such as installation costs and qualifications for CARE programs. There were suggestions to develop neighborhood-specific plans, and recognition that all energy-related changes present both advantages and disadvantages.
Carlsbad Workshop	Groups reported completing LED light replacements and discussed cost barriers requiring financial support, with some awaiting price reductions before making additional purchases. The workshop proved beneficial in facilitating knowledge sharing among participants with relevant experience. Battery replacement costs remain high, prompting requests for further information on solar technology and battery systems.
Online Workshops – English	Discussions highlighted obstacles accessing public charging stations, concerns about solar panels installed in apartments without tenant input or battery integration, and a lack of renter education regarding these impacts. Participants emphasized the need for comprehensive

	information on energy conservation strategies, including electronics and lighting choices, while noting infrastructure challenges such as outdated wiring and inefficient appliances that complicate efforts to reduce peak energy usage.
Online Workshop – Spanish	Participants expressed a strong interest in enhancing energy efficiency through solar panel installations and charging stations, with requests focused on financial incentives and support for implementation.
Vista Workshop	Community members reported upgrades including LED lighting, insulation improvements, solar panel installations, electric water heaters, and heat pumps. Additional strategies mentioned involved using candles and checking appliances prior to bedtime. Programmatic requests featured free mobile solar panels for renters, school-based energy education presentations, improved rebate availability, cost reduction measures, and regulatory mandates for new construction.
Oceanside Workshop	Attendees described implementing solar panels, batteries, insulation, mini splits, heat pumps, furnaces, water heaters, and window replacements. Energy-saving behaviors included unplugging electronics when not in use. Requested programs focused on affordable and free solar panel solutions, appliance and light bulb replacements, electric vehicle charging stations, educational workshops on insulation, and support for home weatherization. Participants also identified the need for clearer guidance on renting versus owning in relation to utility discounts, and funding for mobile home upgrades and modernized kitchen appliances.
Solana Beach Workshop	Discussion groups stressed the importance of renter-specific workshops and landlord engagement to facilitate energy-efficient upgrades. Concerns centered on reduced affordable housing following property improvements, reinforcing renters as an underserved priority group. Participants highlighted limitations faced by landlords, the critical role of business owners and property managers, and the burden placed on managers who may lack adequate education and resources.

Summary of Past and Future Energy Improvements

Across workshops, participants prioritized energy-saving upgrades such as LED lighting, solar panels, and improved insulation. Community members expressed interest in additional measures like battery storage, electric appliances, and weatherization, but noted barriers including high upfront costs, information gaps, and limited access—especially for renters and low-income households. Desired support included financial incentives, multilingual resources, renter-friendly programs, hands-on workshops, and personalized guidance to make upgrades more attainable and effective for diverse community needs.

Section 5. Gauging Awareness of CEA Programs

Workshop participants were provided with the following explanation and questions to understand customer familiarity with programs that help save money, reduce energy and adopt cleaner energy.

CEA offers energy programs designed to help customers save money, reduce energy use and adopt cleaner energy. We want to understand your familiarity with these programs and what programs interest you most.

- *Are you aware of any energy programs or services offered by CEA?*
- *Which types of programs or incentives would you be most interested in learning more about? For example, reduced rates, energy use tracking, solar panels and battery storage, rebates and incentives.*

Response Summary for Section 5: Awareness of CEA Programs

Workshop participants reported limited or no awareness of CEA prior to attending the presentation. Individuals are not familiar with programs to help them reduce energy use. Everyone requested information about CEA and information regarding programs that can help consumers reduce usage and access incentives.

Table 6: Awareness of CEA Programs	
Escondido Workshop	A discussion group expressed interest in cash incentives but raised concerns regarding whether such incentives would be directed to help homeowners rather than renters. Participants noted that customers typically pay attention to their bills primarily in terms of total cost, rather than monitoring actual energy usage. In three out of five groups, attendees reported that the workshop in Escondido was their first exposure to CEA and its programs. One group indicated particular interest in learning about solar panels and clean energy. Another group requested a program providing guidance on selecting appliances—including TVs, computers, washers, and microwaves—as well as general support for energy conservation initiatives. An additional group asked for information addressing the impacts and benefits of energy use. Further requests included a workshop or presentation on bill interpretation, an explanation of the advantages of being a CEA client, education on the distinction between clean and non-clean energy, advice on energy savings, and clarification on energy distribution processes.

	Additional feedback took the form of questions, such as: Do lamp lights contribute significantly to energy costs? What responsibilities does the community bear in terms of energy consumption? At what times do we use energy most frequently? Is there access to reliable renewable energy programs? Other inquiries included: What is the impact if widespread adoption of clean energy or solar panels reduces electric company revenue? How does city lighting affect local economic outcomes? What constitutes clean energy?
San Marcos Workshop	Participants in San Marcos provided the following information regarding awareness of programs. There is general awareness of CARE; however, some individuals are not familiar with CEA programs. One participant expressed regret over lacking information about CEA prior to their decision not to continue with the program, citing a lack of previous awareness. There is notable enthusiasm regarding sustainability initiatives and cost savings. Community members have expressed interest in educational opportunities such as understanding how to read energy bills, measure energy usage, and access available rebates and incentives. Reduced utility rates and increased transparency about CEA through community meetings are also valued, with one group showing specific interest in peak smart programs. Other highlighted interests include participation in free LED lighting distribution, gaining information on the health impacts of pollution, solar panel programs, home upgrades involving weatherization and electrification, battery storage, and access to complimentary batteries. Furthermore, there is a strong preference among community members for receiving information in Spanish and for opportunities to learn more about CEA programs. Questions: ● Is CEA a government agency? ● What impact does energy use and consumption have on environmental pollution? ● How is clean energy defined? ● Does SDGE distribute non-renewable energy, and what distinguishes CEA from SDGE? ● Does CEA provide programs for individuals with low income? ● Are there additional resources offered by CEA to help reduce energy bills?

	● Where can I find more information about strategies to lower energy costs? ● How can I verify my enrollment with CEA? ● Will there be future community meetings to learn more about CEA? ● What are the advantages and potential drawbacks of installing solar panels, especially regarding cost savings? There are concerns that installation may lead to higher expenses. ● What would be my current payments if I install solar panels? ● How can I determine whether the energy I receive is clean? ● When will responses to these questions be provided? ● Is it possible to switch energy providers? ● Can you clarify what is meant by clean energy? ● Could you explain the percentages referenced in the presentation regarding the energy mix? ● What are the specific benefits of CEA? ● How many customers both receive and fully understand their energy bills? ● In what ways do solar panels benefit residents of apartment buildings? ● From where is safe energy sourced? ● Does electricity generation or distribution produce radiation? ● Do energy prices vary depending on usage levels?
Carlsbad Workshop	In one discussion group, most participants were aware of CEA's programs. In another group, half of the members indicated familiarity with these programs, while one individual stated they did not meet the eligibility requirements. Feedback from participants highlighted insufficient advertising related to CEA initiatives. The English-language group expressed a preference for email as their primary mode of communication and suggested collaborating with stakeholders to advocate for supportive legislation. Additionally, concerns were raised regarding profit distribution to businesses and perceptions of excessive charges. Question: What is the cost of solar panels?
Online Workshops - English	The group emphasized the necessity of enhancing education and dissemination of information regarding available programs. There was an inquiry as to whether participation in these programs would be considered a "public charge" for immigrants. An attendee also

	requested additional data on usage for comparison purposes, details about peak operating hours, and asked whether implementing informational campaigns—such as distributing magnets with peak hour details—would be beneficial. Additional questions raised included: a) whether participation in these programs requires disclosure of immigration status; b) if involvement in CEA programs would be classified as a public charge (see: https://www.ilrc.org/public-charge); and c) the need for informational guidance on demand response programs to be provided as handouts. CEA committed to following up with UP regarding concerns around program accessibility and potential perception as a "public charge."
Online Workshop - Spanish	Participants expressed interest in informational programs provided by CEA and educational workshops designed to involve children. Additionally, a discussion group member highlighted an application accessible to select customers.
Vista Workshop	One discussion group indicated a general awareness of the programs offered by CEA, while another expressed limited knowledge regarding these initiatives. Recommendations from community members include enhancing outreach efforts, providing clear information about existing CEA programs and their operations, and featuring testimonials from individuals who have benefited from these programs through online platforms or news outlets. Additionally, it was noted that not all community members utilize social media, and CEA should consider alternative communication channels. A request was also made for a pamphlet detailing the available CEA programs.
Oceanside Workshop	During one discussion group, two participants indicated familiarity with CEA's programs, while three reported they were unaware of them. One group mentioned knowledge of medical care electrical services as well as low-income gas and electric service options. Participants expressed interest in receiving incentives related to gas and electricity, noted discouragement from not receiving support through 211, and requested information regarding qualification for low-income programs. Additional requests included more workshops, guidance on energy conservation for older homes, discounts on electricity, further incentives, assistance with electricity and water bill payments, and reference to the EBD (Equitable Decarbonization Program). The group also raised questions such as how individuals can determine their inclusion in CEA and CEA's perspective on nuclear

	energy. There was a desire for increased promotion of CEA, additional workshops, expanded information about programs, presentations on cost-saving strategies, and sessions on understanding utility bills and energy meters.
Solana Beach Workshop	Several participants were unaware of Peak Smart, opt-out options, and expressed uncertainty regarding available programs for renters. Some participants were familiar with tracking their bill via the SDG&E app and knew about relevant programs; however, they were not eligible to participate. Additionally, some participants did not know that the website featured a comparison tool.

Summary Regarding Awareness of CEA Programs

Overall, workshop participants demonstrated limited awareness of CEA and its energy-saving programs prior to attending. Most individuals requested more information about CEA offerings, especially regarding how to reduce energy usage and access available incentives. Interest was expressed in educational opportunities—such as understanding energy bills, learning about rebates, and exploring clean energy options—while questions and feedback highlighted the need for clearer communication, more outreach, and resources tailored to renters and low-income households. Some participants were familiar with related services, but many were not eligible or lacked information about specific tools and program distinctions.

Attachment C

Customer Opinion Survey
Summary Report

Prepared for
Clean Energy Alliance


April 2025

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INTRODUCTION

Clean Energy Alliance (CEA) is a Joint Powers Authority comprised of seven cities in north San Diego County—the cities of Carlsbad, Del Mar, Escondido, Oceanside, San Marcos, Solana Beach, and Vista. CEA follows a community choice aggregation (CCA) model that allows local governments to purchase power to meet their community's electricity needs, offering an alternative to investor-owned utilities. Although CEA is locally operated, it works in partnership with the region's existing investor-owned utility (San Diego Gas & Electric - SDG&E). CEA purchases electricity directly from energy suppliers, while SDG&E continues to deliver energy, maintain the grid, provide billing services, and handle all new service requests and emergencies.

By pooling energy demand across multiple cities, CEA is able to leverage more purchasing power and ensure a higher renewable content, thus providing local residents and businesses with cleaner energy. Locally controlled and supported by ratepayers with no taxpayer subsidies, CEA ensures that revenues are reinvested in local energy infrastructure and energy efficiency programs for customers.

MOTIVATION FOR RESEARCH Fulfilling its mission to empower local residents and businesses to participate in a cleaner, greener energy future requires that CEA have reliable information about customers' energy-related perceptions, opinions, priorities, and behaviors. What are the major challenges and issues that CEA customers face? How do they prioritize among energy issues and initiatives? What energy improvements have they made and/or are interested in making to their residences or businesses? To what extent are customers aware of the energy programs and solutions that are available, and which programs capture their interest? Answers to questions like these provide CEA with information that can be used to make sound, strategic decisions in a variety of areas—including performance management, planning, program development/evaluation, marketing, and customer engagement.

OVERVIEW OF METHODOLOGY A full description of the methodology used for this study is included later in this report (see *Methodology* on page 39). In brief, the survey was administered to a stratified random sample of 509 residential and commercial customers within CEA's service area. The sample was balanced to proportionately represent the distribution of customers geographically across the seven member cities, as well as by account type (residential or commercial). The survey followed a mixed-method design that employed multiple recruiting methods (email, text, and phone) and multiple data collection methods (online and phone). Administered in English and Spanish between April 9 and April 18, 2025, the average interview length was 16 minutes.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the section titled *Key Findings* is for you. It provides a summary of the most important factual findings of the survey in a Question & Answer format. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the survey by topic area (see *Table of Contents*), as well as a description of the methodology employed for collecting and analyzing the data. And, for the truly ambitious reader, the questionnaire used for the interviews is contained at the back of this report, and a complete set of crosstabulations for the survey results is contained in Appendix A.

ACKNOWLEDGEMENTS True North thanks Clean Energy Alliance for the opportunity to conduct the study and for contributing valuable input during the design stage of this study. The collective experience, insight, and local knowledge provided by CEA staff improved the overall quality of the research presented here.

DISCLAIMER The statements and conclusions in this report are those of the authors (Dr. Timothy McLarney and Richard Sarles) at True North Research, Inc. and not necessarily those of Clean Energy Alliance. Any errors and omissions are the responsibility of the authors.

ABOUT TRUE NORTH True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, perceptions, priorities, and concerns of their residents and customers. Through designing and implementing scientific surveys, focus groups, and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, establishing fiscal priorities, passing revenue measures, and developing effective public information campaigns. During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 1,500 survey research studies for public agencies—including more than 100 studies for public utilities in California.

Key Findings

As noted in the *Introduction*, this study was designed to provide CEA with a statistically reliable understanding of customers' awareness, opinions, priorities, and behaviors with respect to energy-related issues, initiatives, and programs. Whereas subsequent sections of this report are devoted to conveying the detailed results of the survey, in this section we attempt to 'see the forest through the trees' and note how the collective results of the survey answer some of the key questions that motivated the research.

What issues are most importance to CEA customers?

CEA customers are sensitive to issues of cost and affordability. Although this could partially be a reflection of the current economic climate and uncertainty related to tariffs, it is clear that issues of cost and affordability factor prominently among customers' concerns and motivations.

When asked in an *open-ended* manner to identify the most important issue or challenge facing their community today, customers were most apt to cite the high cost of living/affordability (20%), high cost of electricity (11%), government/political issues (9%), high utility rates in general (5%), housing availability/affordability (4%), and climate change/environmental issues (4%). Consistent with their open-ended responses, customers ranked cost-related issues as the most concerning when offered a specific list of issues, including cost of living in general (91% very or somewhat concerned), cost of electricity (90%), and paying for essentials like food, gas, and electricity (82%). Addressing homelessness (75%), protecting the environment (75%), and traffic congestion (74%) were at least somewhat concerning to three-quarters of respondents, whereas two-thirds rated air pollution (70%), climate change (69%), and greenhouse gas emissions (66%) as very or somewhat concerning.

When their focus was narrowed to energy-related issues, reducing their home's/business's energy costs was rated as the most important energy issue (81% extremely or very important), followed by having cleaner air to breathe in their home/building (77%), avoiding power outages at their home/business (75%), and receiving a discount on their energy bill if they use less energy during peak periods (69%). Issues that didn't tie directly back to a respondent's home or business were rated as somewhat less important, including generating more electricity locally through rooftop solar and other small installations (65%), addressing climate change by reducing greenhouse gas emissions (64%), ensuring that low-income households and underserved populations have the same opportunities to transition to clean energy (63%), and creating good-paying jobs in the energy sector (52%). For more on this topic see *Importance of Issues/Initiatives* on page 6.

How do CEA customers prioritize energy actions and initiatives?

Although CEA customers are generally supportive of most actions and initiatives that can be taken to produce cleaner, greener energy and improve the reliability of North County's energy supplies, they tend to prioritize initiatives that provide *broad benefits* as opposed to those that have more targeted benefits or involve new regulations/requirements. Among the 13 actions tested, customers assigned the highest priority to upgrading the electric grid and infrastructure including undergrounding utility wires, expanding grid capacity, and replacing outdated equipment (86% high or medium priority), followed by improving the energy efficiency of buildings so they use less energy and have lower energy bills (83%), creating more back-up power systems that can operate during a power outage (80%), installing more small-scale renewable energy systems like solar on home rooftops and parking lots (77%), and providing job training and certification programs to fill the need for skilled workers in the clean energy sector (76%).

At the other end of the spectrum, CEA customers were less inclined to prioritize requiring all new construction to be all-electric to improve indoor air quality (46%), increasing the number of public access charging stations for electric vehicles (52%), increasing the number of electric cars, trucks, and buses to reduce greenhouse gas emissions and air pollution (57%), and improving access to technical experts who can advise on energy saving projects in the home/for businesses (58%). For more on this topic see *Priority Energy Initiatives & Actions* on page 12.

To what extent have CEA customers made energy improvements to their homes/businesses?

Most CEA customers have made *modest* energy-related improvements to their homes/businesses, with the most common being the use of energy efficient lighting (78%) and weatherization improvements such as improved insulation, windows, and/or roof (55%). Approximately four-in-ten customers also indicated their home/building has solar panels (44%) and a smart home energy/building management system that monitors and controls heating/air conditioning, lighting and appliances to optimize performance and reduce energy use (43%). All remaining improvements tested in the survey were far less common, including an electric stove (26%), electric heat pump water heater (22%), EV charging station (21%), electric furnace (20%), and back-up battery storage (18%). For more on this topic see *Energy Improvements at Home/Business* on page 17.

Are CEA customers aware of available energy-related programs and services?

Despite most CEA customers initially describing themselves as well-informed (15%) or somewhat informed (38%) about the programs and services that are available to help residents/businesses with energy-related improvements, only a few programs enjoy widespread awareness: discounted rates for energy used during off-peak hours (79% aware), discounted rates for low-income households (67%), and rebates/incentives to install solar panels and battery storage (61%).

Less than half of CEA customers indicated they were aware of the remaining programs prior to taking the survey, including rebates/incentives to make energy-efficiency improvements to your home/business, such as improved insulation and windows (46%) and to install energy efficient lighting, appliances, and equipment (44%), discounted rates for those who have medical equipment in their home (44%), and free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills (44%). When compared to the other programs tested, CEA customers were substantially less aware of rebates/incentives to install electric vehicle charging equipment (35%), rebates and incentives to replace gas appliances and equipment with electric appliances and equipment (31%), and programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere (23%). For more on this topic see *Awareness of Specific Programs* on page 21.

How interested are CEA customers in participating in energy-related programs?

Energy-related programs that have broad application tend to find the most interest among CEA customers, especially rebates and incentives to install energy efficient lighting, appliances, and equipment (64% very or somewhat interested), discounted rates for energy used during off-peak hours (61%), and rebates and incentives to make energy-efficient improvements to their home/business's building, such as improved insulation and windows (61%). Free energy audits and technical assistance on how to improve their household's/business's energy efficiency and lower bills (55%) and rebates and incentives to install solar panels and batter storage (48%) were also popular with many customers.

At the other end of the spectrum, programs that had a narrow target audience or purpose tended to garner less interest, including discounted rates for those who have medical equipment in their home (26%), rebates and incentives to install electric vehicle charging equipment (31%), and discounted rates for low-income households (35%). For more on this topic see *Interest in Programs* on page 25.

What are the best methods for communicating with CEA customers?

The vast majority of respondents (78%) who participated in the survey were aware of their status as a CEA customer prior to taking the survey. When asked to rate various ways CEA could communicate with them, customers identified email (79% very or somewhat effective), the Clean Energy Alliance website (73%), direct mail (69%), electronic newsletters (68%), and utility bill inserts (66%) as the most effective methods. That said, preferred communication methods varied considerably across subgroups, with pronounced differences based on respondent age, income, and ethnicity. For more on this topic see *Communication* on page 30.

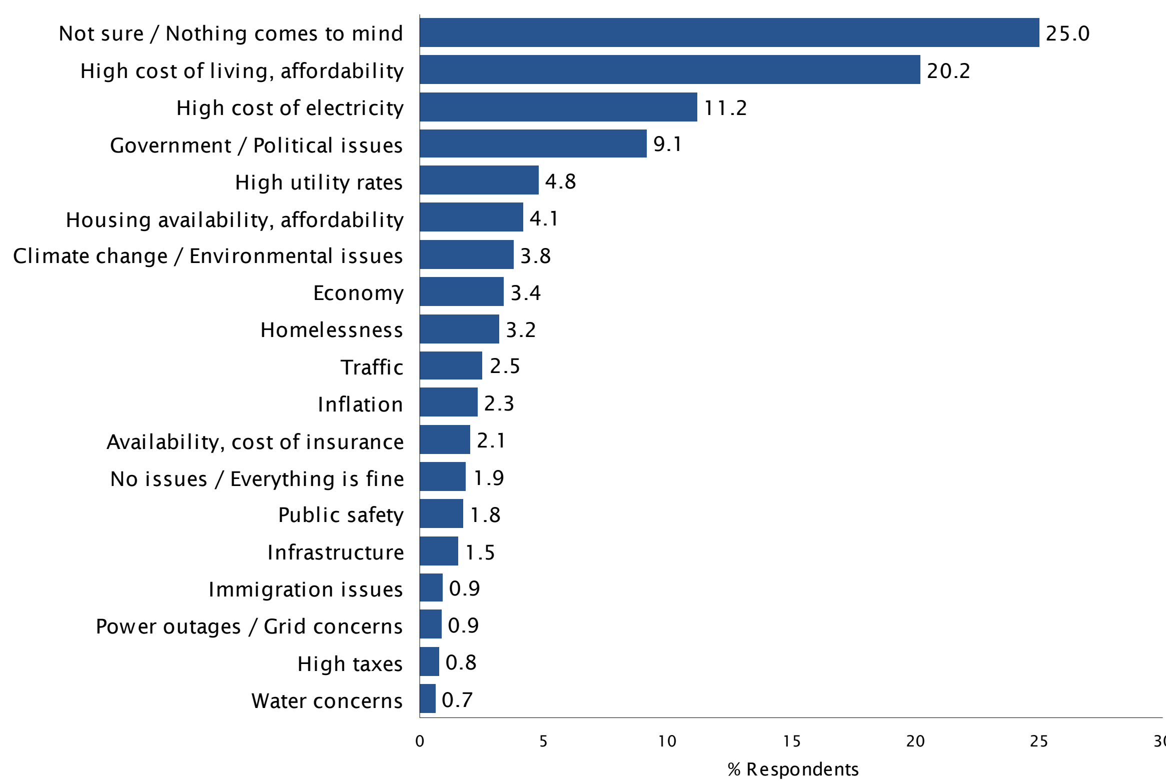
IMPORTANCE OF ISSUES/INITIATIVES

The opening section of the survey profiled customers' opinions regarding the most important issues or challenges facing their community *in general*, the relative importance of various energy-related issues/objectives, and how they would prioritize among a series of energy-related initiatives for their community.

MOST IMPORTANT ISSUE OR CHALLENGE The first question in this series asked customers to identify the most important issue or challenge facing their community today. Question 1 was presented in an open-ended manner, thereby allowing respondents to mention any issue or challenge that came to mind without being prompted by or constrained to a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 1 below.

Question 1 *To begin, what would you say is the most important issue or challenge facing your community today?*

FIGURE 1 MOST IMPORTANT ISSUE FACING COMMUNITY

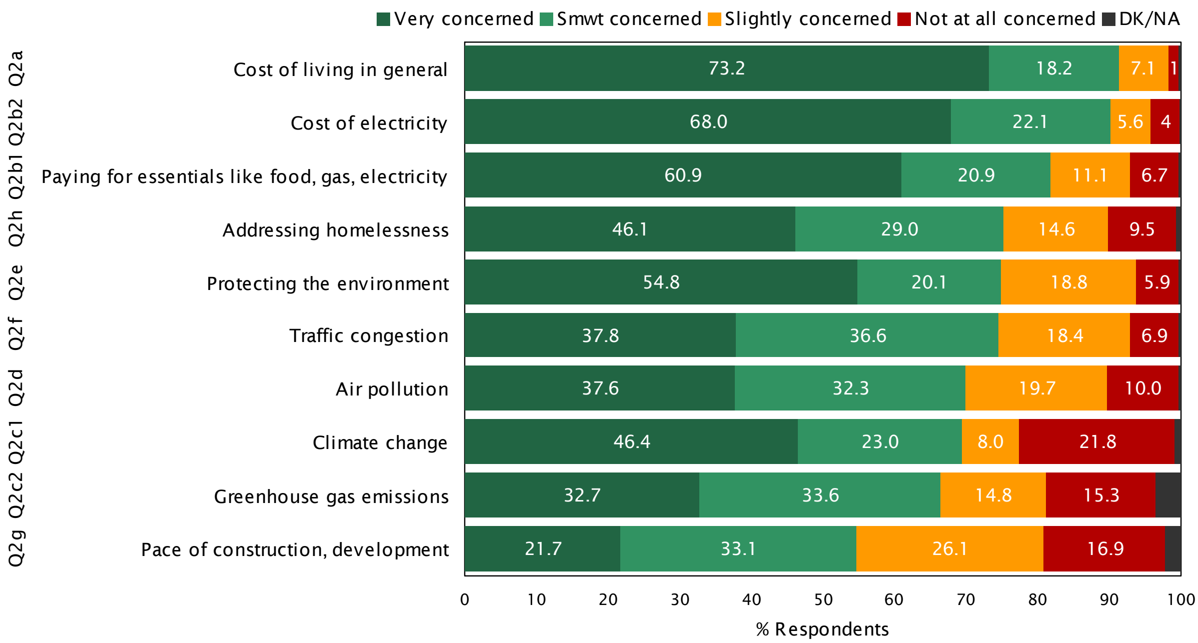


One-in-four respondents (25%) were unsure or could not think of any important issues or challenges facing their community. Among the specific responses, issues of cost and affordability dominated the top mentions. Overall, customers were most apt to cite the high cost of living/affordability (20%), high cost of electricity (11%), government/political issues (9%), high utility rates in general (5%), housing availability/affordability (4%), and climate change/environmental issues (4%) as the most important issue or challenge facing their community.

RANKING OF ISSUES Whereas Question 1 was administered in an open-ended manner to capture customers' top-of-mind response, Question 2 presented respondents with the list of issues shown in Figure 2 and asked customers to describe the extent to which they are concerned about each issue. Consistent with their open-ended responses, customers ranked cost-related issues as the most concerning, including cost of living in general (91% very or somewhat concerned), cost of electricity (90%), and paying for essentials like food, gas, and electricity (82%). Addressing homelessness (75%), protecting the environment (75%), and traffic congestion (74%) were at least somewhat concerning to three-quarters of respondents, whereas two-thirds rated air pollution (70%), climate change (69%), and greenhouse gas emissions (66%) as very or somewhat concerning. When compared to the other issues tested, CEA customers were less concerned about the pace of construction and development (55%).

Question 2 *Next, I'm going to read a list of specific issues. For each one, please tell me how concerned you are about the issue.*

FIGURE 2 RANKING ISSUES OF CONCERN



For the interested reader, tables 1-6 display the percentage of customers who expressed being *very* concerned with an issue according to customer age, location, home type, home ownership, household income, ethnicity, customer type, gender, CARE status, and whether they have rooftop solar.[1] To ease comparisons, the top three issues within each subgroup are highlighted in green. With few exceptions, cost of living in general and cost of electricity were among the top three most concerning issues across CEA customer subgroups.

1. Demographic subgroups (age, ethnicity, home ownership, etc.) were constructed for residential customers only. CARE and Rooftop solar status was classified based on information in the customer database provided by CEA.

TABLE 1 ISSUES OF CONCERN BY AGE (SHOWING % VERY CONCERNED)

	Age (QD1)			
	Under 45	45 to 54	55 to 64	65 or older
Cost of living in general	84.6	89.8	67.0	63.2
Cost of electricity	63.5	87.7	60.3	69.6
Paying for essentials like food, gas, and electricity	68.8	74.1	56.4	57.4
Protecting the environment	52.1	57.7	50.7	64.4
Climate change	44.8	39.1	45.3	60.7
Addressing homelessness	33.1	61.9	35.6	48.4
Traffic congestion	25.0	42.0	30.1	38.3
Air pollution	21.7	23.1	39.4	50.9
Greenhouse gas emissions	25.1	15.6	50.7	43.4
The pace of construction and development	12.7	22.0	19.1	21.1

TABLE 2 ISSUES OF CONCERN BY CUSTOMER CITY (SHOWING % VERY CONCERNED)

	Customer City					
	Carlsbad	Escondido	Oceanside	San Marcos	Solana Beach / Del Mar	Vista
Cost of living in general	65.8	67.3	74.6	70.6	55.1	93.2
Cost of electricity	68.7	82.2	56.2	58.0	55.6	77.4
Paying for essentials like food, gas, and electricity	53.8	51.8	69.2	59.3	30.3	73.1
Protecting the environment	63.8	39.7	56.5	55.3	69.8	57.3
Climate change	56.4	49.1	33.9	47.9	70.8	47.9
Addressing homelessness	44.2	48.0	41.1	44.3	54.4	53.5
Traffic congestion	38.6	27.3	35.2	42.9	27.4	52.5
Air pollution	45.3	32.0	30.4	39.8	34.1	46.7
Greenhouse gas emissions	53.8	23.8	24.1	25.3	59.2	37.8
The pace of construction and development	20.5	19.8	21.0	25.8	13.3	24.6

TABLE 3 ISSUES OF CONCERN BY HOME TYPE & OWNERSHIP STATUS (SHOWING % VERY CONCERNED)

	Home Type (Q8)				Ownership Status (QD2)	
	Single family	Apartment	Condo/ Townhome	Mobile home	Own	Rent
Cost of living in general	68.1	83.0	85.7	92.2	70.9	80.6
Cost of electricity	63.6	63.4	78.3	87.1	64.2	76.5
Paying for essentials like food, gas, and electricity	58.5	70.4	72.8	79.3	61.3	64.2
Protecting the environment	52.4	65.3	57.0	56.8	54.8	58.6
Climate change	42.1	62.3	50.5	56.2	44.4	51.9
Addressing homelessness	43.6	51.8	40.1	62.6	43.1	52.2
Traffic congestion	39.5	39.7	30.0	17.1	38.2	36.3
Air pollution	36.9	34.1	35.2	49.0	40.9	32.1
Greenhouse gas emissions	35.6	27.2	25.4	40.7	35.9	28.1
The pace of construction and development	20.0	23.4	27.6	16.4	20.4	24.5

TABLE 4 ISSUES OF CONCERN BY HOUSEHOLD INCOME (SHOWING % VERY CONCERNED)

	Household Income (QD5)				
	<$50K	$50K to <$99K	$100K to <$149K	$150K to <$199K	$200K+
Cost of living in general	82.2	81.7	70.7	61.8	69.5
Cost of electricity	93.4	67.5	60.9	52.3	53.4
Paying for essentials like food, gas, and electricity	70.6	72.3	59.7	72.4	54.4
Protecting the environment	60.1	63.1	51.3	63.8	39.5
Climate change	51.2	48.5	47.5	57.2	38.6
Addressing homelessness	61.2	41.2	30.5	34.7	39.9
Traffic congestion	50.8	38.8	18.3	31.6	32.9
Air pollution	42.9	42.0	25.2	33.1	33.7
Greenhouse gas emissions	30.6	34.2	20.4	39.9	28.2
The pace of construction and development	26.3	15.7	19.1	25.4	15.4

Table 5 Issues of Concern by Ethnicity & Customer Type (Showing % Very Concerned)

	Ethnicity (QD4)				Customer Type	
	Asian American	Caucasian / White	Latino / Hispanic	Mixed / Other	Residential	Commercial
Cost of living in general	80.5	65.8	86.5	81.2	74.4	64.9
Cost of electricity	65.9	62.1	75.6	83.6	66.9	74.8
Paying for essentials like food, gas, and electricity	68.3	48.5	78.0	83.2	63.4	42.5
Protecting the environment	48.4	53.9	62.7	57.9	55.1	52.6
Climate change	41.1	52.5	45.6	60.4	47.6	37.8
Addressing homelessness	39.9	43.7	52.0	50.3	45.3	51.8
Traffic congestion	40.7	35.6	40.8	44.7	37.5	40.3
Air pollution	56.4	37.3	34.4	33.2	36.9	42.7
Greenhouse gas emissions	52.3	40.6	12.4	26.6	31.6	40.0
The pace of construction and development	12.1	27.5	12.2	34.8	21.5	22.7

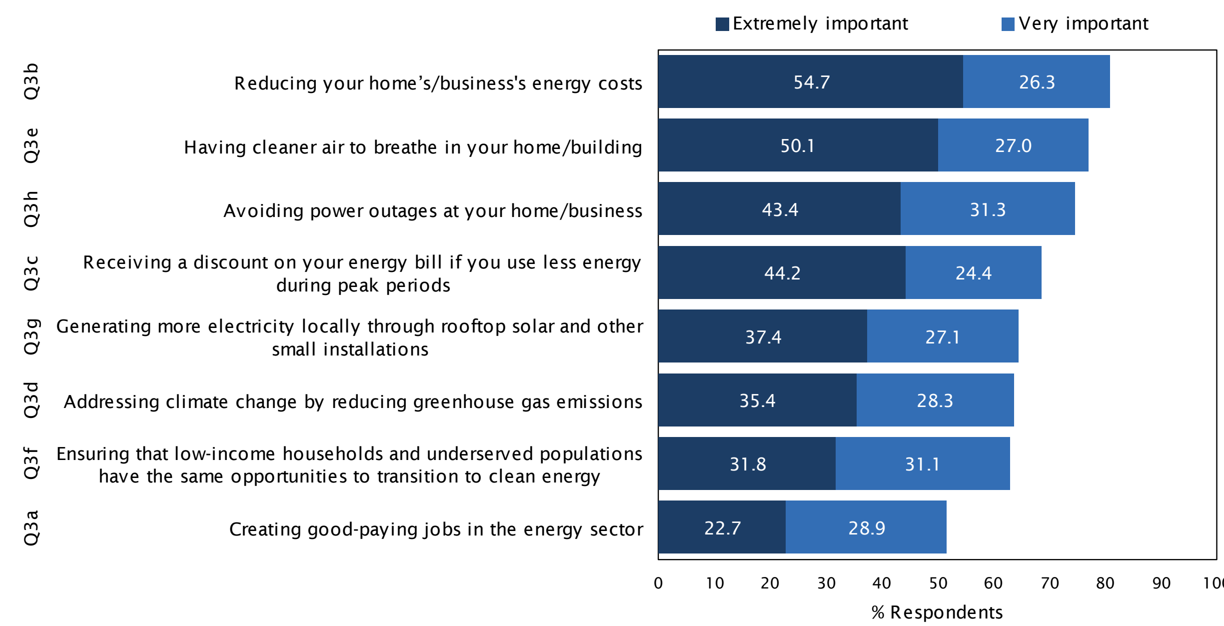
Table 6 Issues of Concern by Gender, CARE Customer in Database & Rooftop Solar Customer in Database (Showing % Very Concerned)

	Gender (QD3)		CARE Customer in Database		Rooftop Solar Customer in Database	
	Male	Female	Yes	No	Yes	No
Cost of living in general	72.5	76.0	87.4	69.0	70.1	74.6
Cost of electricity	64.5	68.3	74.8	66.3	59.6	72.2
Paying for essentials like food, gas, and electricity	67.8	58.1	72.9	56.9	59.1	61.7
Protecting the environment	50.4	58.2	59.2	53.5	60.4	52.2
Climate change	45.0	50.2	38.8	48.3	52.8	43.2
Addressing homelessness	43.2	48.7	56.7	43.0	49.4	44.6
Traffic congestion	38.4	36.2	44.4	35.9	45.6	34.3
Air pollution	37.5	37.5	33.4	38.9	43.6	34.9
Greenhouse gas emissions	36.2	26.3	27.8	34.4	39.5	30.0
The pace of construction and development	16.8	26.1	21.6	21.7	20.2	22.3

IMPORTANCE OF ENERGY ISSUES & OBJECTIVES Question 3 next narrowed customers' focus to the topic of energy, asking that they rate the importance of each energy issue or objective shown in Figure 3 to them/their business.

Question 3 *Turning now to the topic of energy, I'm going to read a list of specific issues. For each one, please tell me how important this issue is to you/your business.*

Figure 3 Importance of Energy Issues



Among the issues tested, reducing their home's/business's energy costs was rated as the most important energy issue (81% extremely or very important), followed by having cleaner air to breathe in their home/building (77%), avoiding power outages at their home/business (75%), and receiving a discount on their energy bill if they use less energy during peak periods (69%). Issues that didn't tie directly back to a respondent's home or business were rated as somewhat less important, including generating more electricity locally through rooftop solar and other small installations (65%), addressing climate change by reducing greenhouse gas emissions (64%), ensuring that low-income households and underserved populations have the same opportunities to transition to clean energy (63%), and creating good-paying jobs in the energy sector (52%).

Tables 7-12 show how the percentage rating each issue as extremely or very important varied across CEA customer subgroups, with the top three issues in each subgroup highlighted green to ease comparisons.

TABLE 7 IMPORTANCE OF ENERGY ISSUES BY AGE (SHOWING % EXTREMELY & VERY IMPORTANT)

	Age (QD1)			
	Under 45	45 to 54	55 to 64	65 or older
Reducing your home's/business's energy costs	93.2	98.4	78.4	77.4
Having cleaner air to breathe in your home/building	84.0	82.9	71.9	85.8
Avoiding power outages at your home/business	79.7	71.6	71.2	77.0
Receiving a discount on your energy bill if you use less energy during peak periods	85.7	91.8	68.2	69.8
Generating more electricity locally through rooftop solar and other small installations	67.7	71.6	70.8	68.7
Addressing climate change by reducing greenhouse gas emissions	59.1	74.2	70.9	73.1
Ensuring that low-income hslds, underserved populations have same opportunities to transition to clean energy	81.9	66.0	54.6	71.1
Creating good-paying jobs in the energy sector	53.5	69.3	49.2	53.5

TABLE 8 IMPORTANCE OF ENERGY ISSUES BY CUSTOMER CITY (SHOWING % EXTREMELY & VERY IMPORTANT)

	Customer City					
	Carlsbad	Escondido	Oceanside	San Marcos	Solana Beach / Del Mar	Vista
Reducing your home's/business's energy costs	84.0	83.7	77.6	78.9	64.4	85.1
Having cleaner air to breathe in your home/building	78.8	76.0	72.8	67.0	83.0	91.0
Avoiding power outages at your home/business	82.3	70.9	75.4	69.3	84.5	72.5
Receiving a discount on your energy bill if you use less energy during peak periods	70.8	68.2	71.3	60.7	60.6	71.6
Generating more electricity locally through rooftop solar and other small installations	67.7	63.8	65.7	64.7	68.3	59.1
Addressing climate change by reducing greenhouse gas emissions	67.2	59.6	62.4	54.6	68.3	74.4
Ensuring that low-income hslds, underserved populations have same opportunities to transition to clean energy	58.2	66.3	65.8	54.0	45.8	71.4
Creating good-paying jobs in the energy sector	54.8	43.9	55.1	48.5	56.0	54.0

Table 9 Importance of Energy Issues by Home Type & Ownership Status (Showing % Extremely & Very Important)

	Home Type (Q8)				Ownership Status (QD2)	
	Single family	Apartment	Condo/ Townhome	Mobile home	Own	Rent
Reducing your home's/business's energy costs	77.9	90.0	90.1	92.2	79.4	86.6
Having cleaner air to breathe in your home/building	76.8	84.2	84.3	82.5	76.6	81.1
Avoiding power outages at your home/business	77.6	62.9	81.7	48.6	77.5	72.1
Receiving a discount on your energy bill if you use less energy during peak periods	67.6	76.4	75.4	88.3	68.6	72.2
Generating more electricity locally through rooftop solar and other small installations	70.1	61.3	58.6	75.0	65.2	64.4
Addressing climate change by reducing greenhouse gas emissions	60.6	81.9	64.7	77.8	61.7	68.6
Ensuring that low-income hslds, underserved populations have same opportunities to transition to clean energy	57.6	85.5	68.8	80.5	61.8	70.5
Creating good-paying jobs in the energy sector	45.4	58.6	66.4	64.7	50.3	55.6

Table 10 Importance of Energy Issues by Household Income (Showing % Extremely & Very Important)

	Household Income (QD5)				
	<$50K	$50K to <$99K	$100K to <$149K	$150K to <$199K	$200K+
Reducing your home's/business's energy costs	95.4	90.3	79.2	88.9	77.6
Having cleaner air to breathe in your home/building	88.5	86.9	76.1	83.7	66.4
Avoiding power outages at your home/business	73.1	87.0	63.6	88.5	68.1
Receiving a discount on your energy bill if you use less energy during peak periods	86.3	77.2	69.4	72.9	54.7
Generating more electricity locally through rooftop solar and other small installations	72.1	71.8	58.3	70.3	62.5
Addressing climate change by reducing greenhouse gas emissions	73.7	68.5	63.2	72.4	52.0
Ensuring that low-income hslds, underserved populations have same opportunities to transition to clean energy	86.0	75.3	64.1	64.1	45.2
Creating good-paying jobs in the energy sector	56.0	72.0	39.9	56.9	36.4

Table 11 Importance of Energy Issues by Ethnicity & Customer Type (Showing % Extremely & Very Important)

	Ethnicity (QD4)				Customer Type	
	Asian American	Caucasian / White	Latino / Hispanic	Mixed / Other	Residential	Commercial
Reducing your home's/business's energy costs	74.3	78.8	90.6	97.5	82.6	69.5
Having cleaner air to breathe in your home/building	82.4	76.3	83.9	87.2	79.2	61.8
Avoiding power outages at your home/business	82.4	79.1	68.2	84.5	74.5	76.3
Receiving a discount on your energy bill if you use less energy during peak periods	75.7	63.7	87.6	86.8	71.2	50.8
Generating more electricity locally through rooftop solar and other small installations	66.9	69.7	68.0	56.5	66.3	52.5
Addressing climate change by reducing greenhouse gas emissions	67.1	67.1	68.5	64.1	65.6	50.3
Ensuring that low-income hslds, underserved populations have same opportunities to transition to clean energy	70.4	60.9	81.2	68.0	65.2	47.2
Creating good-paying jobs in the energy sector	45.7	50.4	59.1	64.1	52.6	44.7

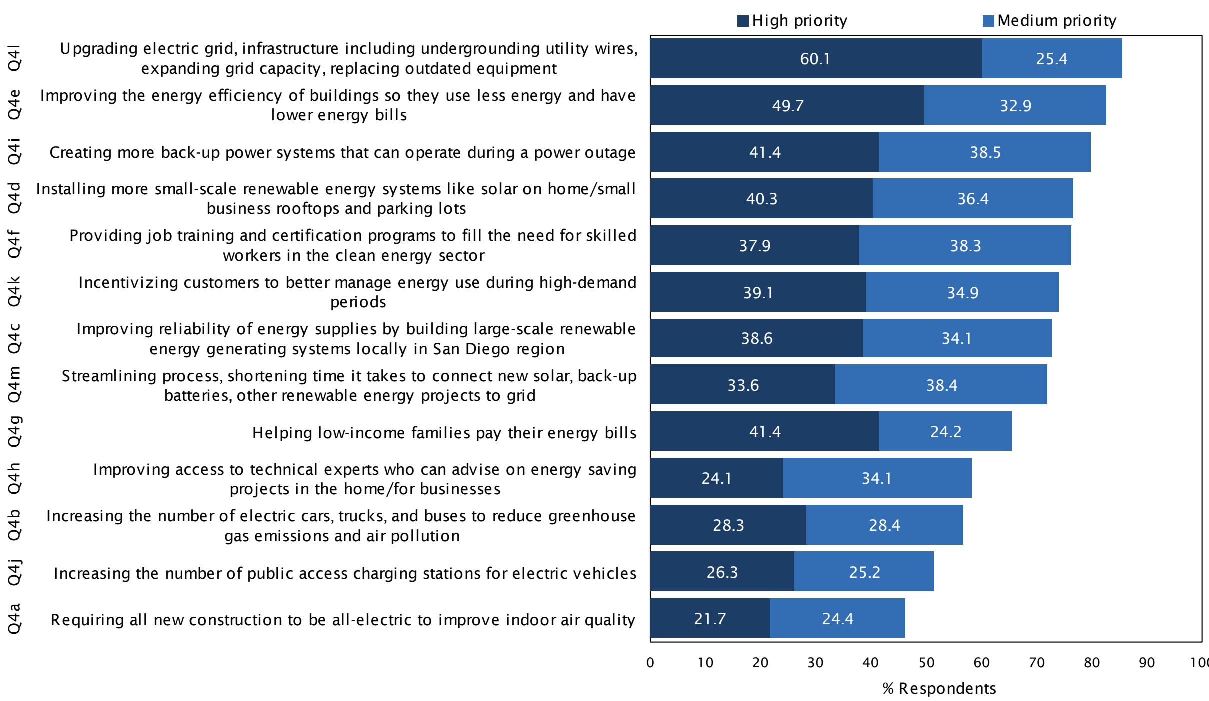
TABLE 12 IMPORTANCE OF ENERGY ISSUES BY GENDER, CARE CUSTOMER IN DATABASE & ROOFTOP SOLAR CUSTOMER IN DATABASE (SHOWING % EXTREMELY & VERY IMPORTANT)

	Gender (QD3)		CARE Customer in Database		Rooftop Solar Customer in Database	
	Male	Female	Yes	No	Yes	No
Reducing your home's/business's energy costs	81.5	84.4	91.0	78.0	76.5	83.0
Having cleaner air to breathe in your home/building	81.9	76.7	85.4	74.6	75.4	77.8
Avoiding power outages at your home/business	73.0	76.3	74.7	74.7	78.3	73.0
Receiving a discount on your energy bill if you use less energy during peak periods	68.4	76.3	82.4	64.6	70.0	68.0
Generating more electricity locally through rooftop solar and other small installations	68.2	65.4	62.4	65.2	80.6	57.2
Addressing climate change by reducing greenhouse gas emissions	62.6	67.8	69.4	62.0	68.7	61.4
Ensuring that low-income hslds, underserved populations have same opportunities to transition to clean energy	60.6	71.9	83.9	56.7	60.3	64.1
Creating good-paying jobs in the energy sector	45.7	61.7	65.4	47.5	52.6	51.1

PRIORITY ENERGY INITIATIVES & ACTIONS Having measured how CEA customers rank specific energy issues, Question 4 transitioned to a list of initiatives and actions that could be taken in the future. For each of the actions shown in Figure 4, customers were asked to identify whether the action should be a high, medium, or low priority for their community—or if they think the action should not be taken.

Question 4 *Next, I'm going to read a short list of actions that could be taken in the future. As I read each item, please indicate whether you think it should be a high priority, medium priority, or low priority for your community. If you think the action shouldn't be taken, please indicate so. Also, please keep in mind that not all items can be high priorities.*

FIGURE 4 PRIORITY ENERGY ACTIONS



At the top of the list, customers assigned the highest priority to upgrading the electric grid and infrastructure including undergrounding utility wires, expanding grid capacity, and replacing outdated equipment (86% high or medium priority), followed by improving the energy efficiency of buildings so they use less energy and have lower energy bills (83%), creating more back-up power systems that can operate during a power outage (80%), installing more small-scale renewable energy systems like solar on home rooftops and parking lots (77%), and providing job training and certification programs to fill the need for skilled workers in the clean energy sector (76%).

At the other end of the spectrum, CEA customers were less inclined to prioritize requiring all new construction to be all-electric to improve indoor air quality (46%), increasing the number of public access charging stations for electric vehicles (52%), increasing the number of electric cars, trucks, and buses to reduce greenhouse gas emissions and air pollution (57%), and improving access to technical experts who can advise on energy saving projects in the home/for businesses (58%).

For the interested reader, tables 13-18 show how the percentage of respondents who rated each as a high or medium priority varied across CEA customer subgroups, with the top five priorities highlighted in green within each subgroup.

TABLE 13 PRIORITY ENERGY ACTIONS BY AGE (SHOWING % HIGH OR MEDIUM PRIORITY)

	Age (QD1)			
	Under 45	45 to 54	55 to 64	65 or older
Upgrading electric grid, infrastructure including undergrounding utility wires, expanding grid capacity, replacing outdated equipment	72.8	88.7	90.6	89.8
Improving the energy efficiency of buildings so they use less energy and have lower energy bills	85.7	81.3	81.7	90.8
Creating more back-up power systems that can operate during a power outage	80.7	80.1	80.1	82.2
Installing more small-scale renewable energy systems like solar on home/small business rooftops and parking lots	72.1	87.3	84.2	77.8
Providing job training and certification programs to fill the need for skilled workers in the clean energy sector	77.4	79.5	78.7	83.2
Incentivizing customers to better manage energy use during high-demand periods	75.9	84.7	79.5	81.8
Improving reliability of energy supplies by building large-scale renewable energy generating systems locally in San Diego region	70.9	85.1	77.7	74.4
Streamlining process, shortening time it takes to connect new solar, back-up batteries, other renewable energy projects to grid	61.9	81.5	87.6	74.3
Helping low-income families pay their energy bills	76.0	53.4	68.5	76.7
Improving access to technical experts who can advise on energy saving projects in the home/for businesses	61.4	64.1	58.8	65.6
Increasing the number of electric cars, trucks, and buses to reduce greenhouse gas emissions and air pollution	57.3	59.6	60.0	65.4
Increasing the number of public access charging stations for electric vehicles	42.6	57.8	50.9	58.9
Requiring all new construction to be all-electric to improve indoor air quality	57.3	44.5	43.3	52.2

TABLE 14 PRIORITY ENERGY ACTIONS BY CUSTOMER CITY (SHOWING % HIGH OR MEDIUM PRIORITY)

	Customer City					
	Carlsbad	Escondido	Oceanside	San Marcos	Solana Beach / Del Mar	Vista
Upgrading electric grid, infrastructure including undergrounding utility wires, expanding grid capacity, replacing outdated equipment	91.7	89.5	82.7	83.4	93.9	77.8
Improving the energy efficiency of buildings so they use less energy and have lower energy bills	84.4	82.6	83.2	74.9	95.4	83.9
Creating more back-up power systems that can operate during a power outage	89.7	85.1	74.4	69.4	86.9	78.7
Installing more small-scale renewable energy systems like solar on home/small business rooftops and parking lots	78.0	81.6	77.6	75.6	83.9	67.0
Providing job training and certification programs to fill the need for skilled workers in the clean energy sector	80.3	76.4	77.8	69.7	62.0	78.1
Incentivizing customers to better manage energy use during high-demand periods	79.9	72.2	75.4	64.5	82.1	74.7
Improving reliability of energy supplies by building large-scale renewable energy generating systems locally in San Diego region	90.2	70.1	62.0	76.1	76.8	68.8
Streamlining process, shortening time it takes to connect new solar, back-up batteries, other renewable energy projects to grid	80.5	69.1	71.7	66.4	66.6	72.8
Helping low-income families pay their energy bills	76.7	65.6	58.1	50.4	69.1	77.6
Improving access to technical experts who can advise on energy saving projects in the home/for businesses	62.2	60.2	55.4	47.6	72.2	62.0
Increasing the number of electric cars, trucks, and buses to reduce greenhouse gas emissions and air pollution	69.1	49.0	51.6	54.9	70.6	58.7
Increasing the number of public access charging stations for electric vehicles	58.0	46.9	50.6	47.6	58.9	53.0
Requiring all new construction to be all-electric to improve indoor air quality	49.8	46.4	45.2	37.8	54.2	48.8

TABLE 15 PRIORITY ENERGY ACTIONS BY HOME TYPE & OWNERSHIP STATUS (SHOWING % HIGH OR MEDIUM PRIORITY)

	Home Type (Q8)				Ownership Status (QD2)	
	Single family	Apartment	Condo/ Townhome	Mobile home	Own	Rent
Upgrading electric grid, infrastructure including undergrounding utility wires, expanding grid capacity, replacing outdated equipment	90.7	64.4	86.6	100.0	91.0	76.9
Improving the energy efficiency of buildings so they use less energy and have lower energy bills	81.2	86.3	88.3	92.2	82.6	84.6
Creating more back-up power systems that can operate during a power outage	77.9	77.4	85.2	91.4	81.6	79.8
Installing more small-scale renewable energy systems like solar on home/small business rooftops and parking lots	77.8	67.1	75.8	92.2	79.2	72.6
Providing job training and certification programs to fill the need for skilled workers in the clean energy sector	77.5	74.4	78.6	88.3	79.0	71.2
Incentivizing customers to better manage energy use during high-demand periods	73.1	77.2	80.3	81.0	75.4	72.9
Improving reliability of energy supplies by building large-scale renewable energy generating systems locally in San Diego region	71.4	72.0	74.1	74.7	72.0	75.5
Streamlining process, shortening time it takes to connect new solar, back-up batteries, other renewable energy projects to grid	76.6	59.3	64.5	87.5	75.9	64.9
Helping low-income families pay their energy bills	57.4	87.4	68.9	93.0	63.1	74.0
Improving access to technical experts who can advise on energy saving projects in the home/for businesses	54.9	58.0	62.3	80.5	59.7	57.4
Increasing the number of electric cars, trucks, and buses to reduce greenhouse gas emissions and air pollution	59.0	55.6	53.2	70.1	59.7	52.8
Increasing the number of public access charging stations for electric vehicles	51.6	46.0	53.7	71.9	54.6	45.6
Requiring all new construction to be all-electric to improve indoor air quality	40.9	65.2	41.5	57.6	43.3	54.4

Table 16 Priority Energy Actions by Household Income (Showing % High or Medium Priority)

	Household Income (QD5)				
	<$50K	$50K to <$99K	$100K to <$149K	$150K to <$199K	$200K+
Upgrading electric grid, infrastructure including undergrounding utility wires, expanding grid capacity, replacing outdated equipment	77.7	81.8	88.5	93.4	91.3
Improving the energy efficiency of buildings so they use less energy and have lower energy bills	84.9	82.4	87.0	82.5	77.8
Creating more back-up power systems that can operate during a power outage	81.0	72.3	82.8	91.2	74.0
Installing more small-scale renewable energy systems like solar on home/small business rooftops and parking lots	80.5	73.8	74.4	88.5	62.5
Providing job training and certification programs to fill the need for skilled workers in the clean energy sector	81.4	79.4	75.2	76.8	67.3
Incentivizing customers to better manage energy use during high-demand periods	82.6	73.8	77.5	81.5	75.1
Improving reliability of energy supplies by building large-scale renewable energy generating systems locally in San Diego region	72.3	73.0	69.3	80.2	77.1
Streamlining process, shortening time it takes to connect new solar, back-up batteries, other renewable energy projects to grid	66.3	67.2	74.0	87.9	77.4
Helping low-income families pay their energy bills	82.4	64.0	67.1	68.2	49.9
Improving access to technical experts who can advise on energy saving projects in the home/for businesses	79.1	53.2	56.2	56.4	39.8
Increasing the number of electric cars, trucks, and buses to reduce greenhouse gas emissions and air pollution	58.1	53.9	53.4	69.1	62.8
Increasing the number of public access charging stations for electric vehicles	50.3	42.5	54.0	65.7	57.9
Requiring all new construction to be all-electric to improve indoor air quality	64.1	45.2	47.4	45.5	28.3

Table 17 Priority Energy Actions by Ethnicity & Customer Type (Showing % High or Medium Priority)

	Ethnicity (QD4)				Customer Type	
	Asian American	Caucasian / White	Latino / Hispanic	Mixed / Other	Residential	Commercial
Upgrading electric grid, infrastructure including undergrounding utility wires, expanding grid capacity, replacing outdated equipment	86.9	91.7	76.2	89.7	85.0	88.6
Improving the energy efficiency of buildings so they use less energy and have lower energy bills	91.5	84.6	85.6	81.2	83.6	76.2
Creating more back-up power systems that can operate during a power outage	82.9	82.9	78.6	82.9	79.5	82.6
Installing more small-scale renewable energy systems like solar on home/small business rooftops and parking lots	67.7	80.5	73.5	69.9	76.1	81.1
Providing job training and certification programs to fill the need for skilled workers in the clean energy sector	74.1	76.3	82.5	86.4	77.6	66.6
Incentivizing customers to better manage energy use during high-demand periods	83.7	79.1	79.4	67.2	75.2	66.2
Improving reliability of energy supplies by building large-scale renewable energy generating systems locally in San Diego region	86.9	76.5	68.8	79.6	72.2	76.0
Streamlining process, shortening time it takes to connect new solar, back-up batteries, other renewable energy projects to grid	75.7	77.4	67.2	66.6	71.7	73.9
Helping low-income families pay their energy bills	59.3	66.8	74.4	59.6	66.3	60.4
Improving access to technical experts who can advise on energy saving projects in the home/for businesses	54.6	57.2	67.4	50.1	57.7	61.6
Increasing the number of electric cars, trucks, and buses to reduce greenhouse gas emissions and air pollution	56.7	60.9	62.4	50.1	57.3	52.0
Increasing the number of public access charging stations for electric vehicles	52.4	55.0	56.4	27.8	51.6	50.7
Requiring all new construction to be all-electric to improve indoor air quality	46.0	46.7	53.1	51.9	45.9	47.6

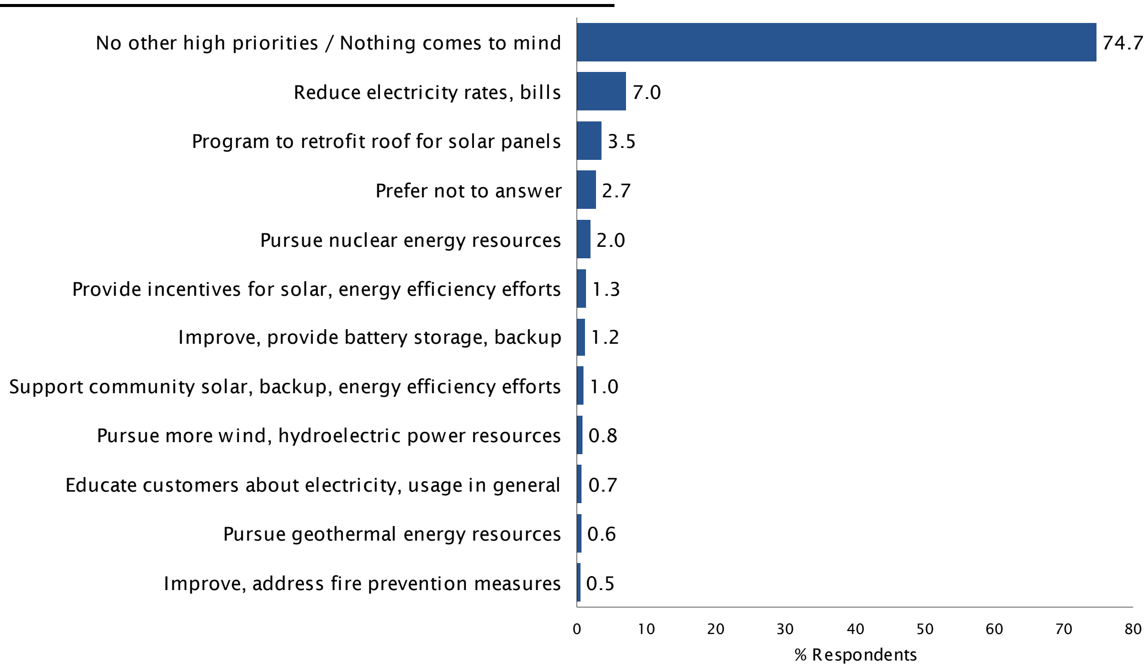
TABLE 18 PRIORITY ENERGY ACTIONS BY GENDER, CARE CUSTOMER IN DATABASE & ROOFTOP SOLAR CUSTOMER IN DATABASE (SHOWING % HIGH OR MEDIUM PRIORITY)

	Gender (QD3)		CARE Customer in Database		Rooftop Solar Customer in Database	
	Male	Female	Yes	No	Yes	No
Upgrading electric grid, infrastructure including undergrounding utility wires, expanding grid capacity, replacing outdated equipment	91.6	78.9	73.5	89.0	90.2	83.3
Improving the energy efficiency of buildings so they use less energy and have lower energy bills	84.9	82.2	77.8	84.1	81.7	83.1
Creating more back-up power systems that can operate during a power outage	79.9	79.3	80.5	79.7	80.3	79.7
Installing more small-scale renewable energy systems like solar on home/small business rooftops and parking lots	79.4	73.0	77.3	76.5	85.8	72.6
Providing job training and certification programs to fill the need for skilled workers in the clean energy sector	76.0	80.2	80.9	74.9	80.3	74.4
Incentivizing customers to better manage energy use during high-demand periods	80.1	73.7	76.3	73.4	76.4	73.0
Improving reliability of energy supplies by building large-scale renewable energy generating systems locally in San Diego region	79.8	62.9	68.6	73.8	75.4	71.4
Streamlining process, shortening time it takes to connect new solar, back-up batteries, other renewable energy projects to grid	76.6	66.9	67.4	73.3	80.8	67.9
Helping low-income families pay their energy bills	64.3	69.1	74.9	62.8	57.1	69.4
Improving access to technical experts who can advise on energy saving projects in the home/for businesses	58.2	60.2	65.8	56.0	57.9	58.4
Increasing the number of electric cars, trucks, and buses to reduce greenhouse gas emissions and air pollution	66.8	47.0	55.0	57.1	62.8	53.8
Increasing the number of public access charging stations for electric vehicles	58.6	42.1	55.7	50.2	58.4	48.3
Requiring all new construction to be all-electric to improve indoor air quality	50.9	40.8	46.6	46.0	47.7	45.4

Recognizing that the list of items in Question 4 was not exhaustive, Question 5 followed-up by providing respondents with the opportunity to identify any energy-related project or program not previously mentioned that they think should be a high priority for their community. Most respondents (75%) did not suggest an additional priority, while 7% mentioned reducing electricity rates/costs and 4% mentioned a program to retrofit roofs for solar panels.

Question 5 *Is there an energy-related project or program not previously mentioned that you think should be a high priority for your community?*

FIGURE 5 OTHER HIGH PRIORITY ENERGY-RELATED PROJECTS OR PROGRAMS



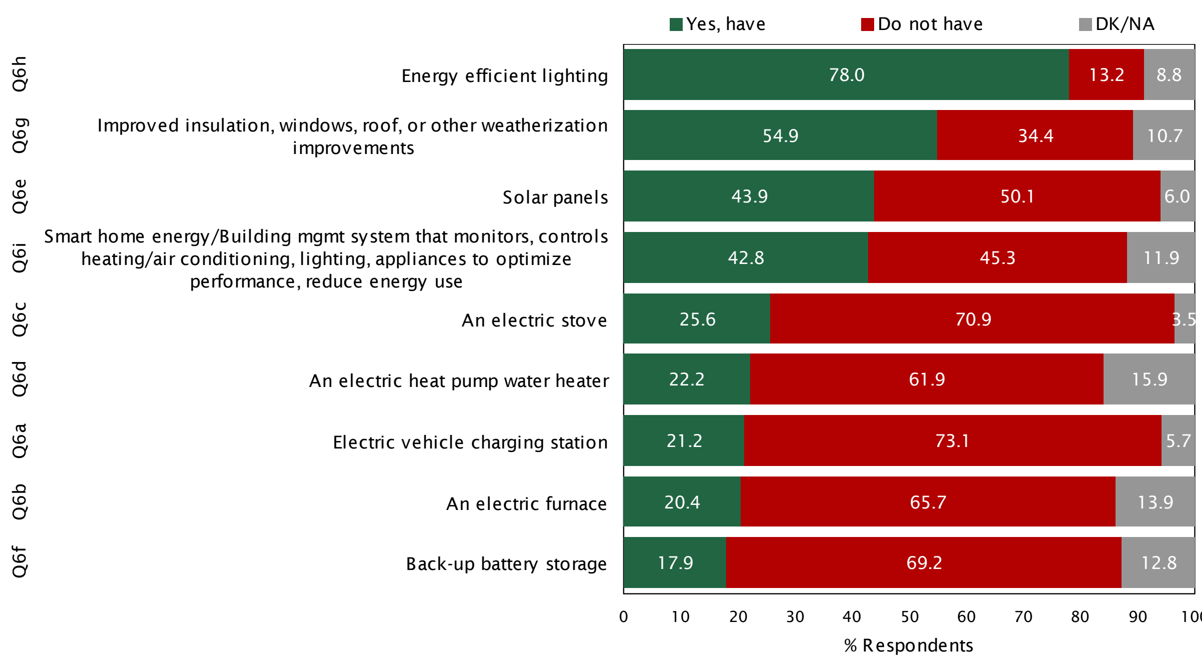
ENERGY IMPROVEMENTS & PROGRAMS

Having measured CEA customer's opinions and priorities with respect to energy issues and initiatives that can impact their community (see prior section), beginning with Question 6 the survey shifted focus to customer-specific topics—including the energy improvements they have made to their home/business building, their awareness of various energy-related programs, as well as their interest in said programs.

ENERGY IMPROVEMENTS AT HOME/BUSINESS The first question in this series simply asked respondents to identify the types of energy improvements that are present in their current home/business building. As shown in Figure 6 below, most customers reported their home/business uses energy efficient lighting (78%) and has weatherization improvements such as improved insulation, windows, and/or roof (55%). Approximately four-in-ten customers also indicated their home/building has solar panels (44%) and a smart home energy/building management system that monitors and controls heating/air conditioning, lighting and appliances to optimize performance and reduce energy use (43%). The remaining improvements were far less common, including an electric stove (26%), electric heat pump water heater (22%), EV charging station (21%), electric furnace (20%), and back-up battery storage (18%).

Question 6 *Next, I'm going to read a list of energy improvements that can be made to a home/building. For each, please say 'yes' if your current home/business' building has this improvement - 'no' if not.*

FIGURE 6 ENERGY IMPROVEMENTS AT HOME/BUSINESS



Tables 19-24 show how the presence of each improvement in their home/business varied across subgroups of CEA customers, with the top three most common improvements highlighted in green within each subgroup.

Table 19 Energy Improvements at Home/Business by Age (Showing % Yes)

	Age (QD1)			
	Under 45	45 to 54	55 to 64	65 or older
Energy efficient lighting	72.8	89.5	86.7	83.6
Improved insulation, windows, roof, or other weatherization improvements	57.0	58.7	58.4	65.3
Solar panels	28.2	71.1	60.1	44.8
Smart home energy/Building mgmt system that monitors, controls heating/AC, lighting, appliances to optimize performance, reduce energy use	34.5	65.6	52.8	40.6
An electric stove	21.7	25.8	22.6	27.5
An electric heat pump water heater	17.9	27.7	19.6	18.5
Electric vehicle charging station	15.1	36.0	33.9	21.4
An electric furnace	12.8	26.1	25.2	18.1
Back-up battery storage	18.9	31.0	17.5	13.7

Table 20 Energy Improvements at Home/Business by Customer City Showing % Yes)

	Customer City					
	Carlsbad	Escondido	Oceanside	San Marcos	Solana Beach / Del Mar	Vista
Energy efficient lighting	80.2	74.4	75.6	74.6	84.4	85.7
Improved insulation, windows, roof, or other weatherization improvements	55.6	52.2	53.9	53.6	42.7	63.2
Solar panels	54.1	46.0	42.3	43.7	53.3	30.2
Smart home energy/Building mgmt system that monitors, controls heating/AC, lighting, appliances to optimize performance, reduce energy use	55.3	44.5	38.6	51.8	34.7	26.8
An electric stove	21.5	26.5	31.5	14.5	30.8	28.8
An electric heat pump water heater	24.1	15.6	20.1	11.3	28.7	40.4
Electric vehicle charging station	39.5	15.0	18.5	24.9	22.4	9.1
An electric furnace	22.5	18.3	24.2	15.1	40.3	14.7
Back-up battery storage	21.6	18.7	16.6	18.7	19.3	13.9

Table 21 Energy Improvements at Home/Business by Home Type & Ownership Status (Showing % Yes)

	Home Type (Q8)				Ownership Status (QD2)	
	Single family	Apartment	Condo/ Townhome	Mobile home	Own	Rent
Energy efficient lighting	88.9	52.2	78.9	69.3	87.0	57.2
Improved insulation, windows, roof, or other weatherization improvements	68.0	35.6	50.2	70.4	64.9	31.9
Solar panels	64.4	20.7	23.5	13.6	55.3	18.8
Smart home energy/Building mgmt system that monitors, controls heating/AC, lighting, appliances to optimize performance, reduce energy use	58.0	14.8	37.5	17.2	52.6	21.8
An electric stove	18.2	50.1	39.8	8.6	21.4	35.5
An electric heat pump water heater	20.0	27.4	16.4	0.0	20.8	27.5
Electric vehicle charging station	24.8	12.3	20.0	13.2	24.1	13.9
An electric furnace	19.2	16.7	23.4	0.0	21.7	16.9
Back-up battery storage	22.1	11.5	12.0	10.5	20.6	9.9

Table 22 Energy Improvements at Home/Business by Household Income Showing % Yes)

	Household Income (QD5)				
	<$50K	$50K to <$99K	$100K to <$149K	$150K to <$199K	$200K+
Energy efficient lighting	73.6	72.0	82.0	91.7	90.1
Improved insulation, windows, roof, or other weatherization improvements	49.0	65.3	50.2	74.6	65.2
Solar panels	37.5	38.0	41.4	67.8	67.0
Smart home energy/Building mgmt system that monitors, controls heating/AC, lighting, appliances to optimize performance, reduce energy use	30.1	39.2	30.1	69.0	68.4
An electric stove	28.3	29.3	25.5	23.4	26.1
An electric heat pump water heater	24.5	18.5	12.0	15.0	23.4
Electric vehicle charging station	9.4	19.4	18.2	33.0	43.1
An electric furnace	20.3	16.0	25.4	20.3	17.4
Back-up battery storage	14.1	23.5	14.4	22.2	27.0

Table 23 Energy Improvements at Home/Business by Ethnicity & Customer Type

	Ethnicity (QD4)				Customer Type	
	Asian American	Caucasian / White	Latino / Hispanic	Mixed / Other	Residential	Commercial
Energy efficient lighting	96.0	81.2	77.3	70.0	79.6	66.8
Improved insulation, windows, roof, or other weatherization improvements	55.4	62.0	58.2	64.1	59.2	25.2
Solar panels	45.5	45.6	52.8	33.7	47.0	22.5
Smart home energy/Building mgmt system that monitors, controls heating/AC, lighting, appliances to optimize performance, reduce energy use	56.0	43.3	44.2	30.9	44.7	29.6
An electric stove	37.6	25.8	25.9	51.7	27.3	14.4
An electric heat pump water heater	27.7	14.4	26.0	28.6	19.7	39.4
Electric vehicle charging station	28.3	23.3	17.8	24.1	21.8	17.2
An electric furnace	21.1	17.8	22.0	20.8	19.3	27.8
Back-up battery storage	20.6	12.5	23.9	17.5	18.4	14.4

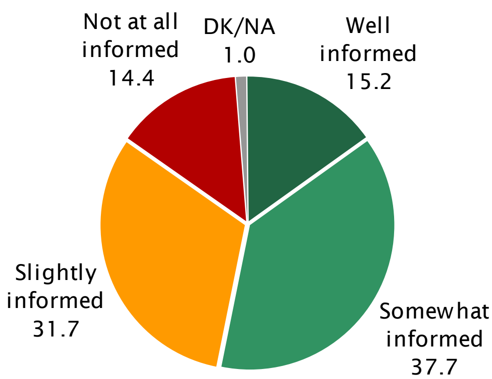
Table 24 Energy Improvements at Home/Business by Gender, CARE Customer in Database & Rooftop Solar Customer in Database (Showing % Yes)

	Gender (QD3)		CARE Customer in Database		Rooftop Solar Customer in Database	
	Male	Female	Yes	No	Yes	No
Energy efficient lighting	92.9	64.1	75.9	78.6	88.3	73.3
Improved insulation, windows, roof, or other weatherization improvements	66.3	53.0	57.0	54.3	69.6	48.2
Solar panels	60.7	33.3	38.5	45.5	95.1	20.5
Smart home energy/Building mgmt system that monitors, controls heating/AC, lighting, appliances to optimize performance, reduce energy use	56.2	33.3	39.5	43.8	64.5	32.9
An electric stove	25.9	30.6	35.6	22.7	19.2	28.6
An electric heat pump water heater	24.9	14.8	26.5	20.9	16.5	24.8
Electric vehicle charging station	30.4	12.7	14.6	23.1	33.1	15.8
An electric furnace	20.1	16.6	19.1	20.8	17.9	21.6
Back-up battery storage	22.7	14.2	21.8	16.8	23.3	15.4

HOW INFORMED DO YOU FEEL? All customers were next asked to describe how informed they felt about the programs and services that are available to help residents/businesses with energy-related improvements. Most customers indicated they felt either well-informed (15%) or somewhat informed (38%) about the available programs and services, whereas one-third described themselves as slightly informed (32%). Approximately 14% of CEA customers indicated they are not at all informed about the programs and services that are available to help customers with energy-related improvements, whereas 1% were unsure or preferred to not answer the question.

Question 7 *In general, how informed do you feel about the programs and services that are available to help residents/businesses with energy-related improvements? Would you say you feel well informed, somewhat informed, slightly informed, or not at all informed?*

FIGURE 7 HOW INFORMED ABOUT ENERGY-RELATED PROGRAMS



When compared to their respective counterparts, seniors, those living in single family homes, home owners, residents of Carlsbad, high-income households, Caucasians, males, those not enrolled in the CARE program, and customers with rooftop solar were the most likely to describe themselves as at least somewhat informed about the programs and services available to help customers with energy-related improvements (see figures 8-10).

FIGURE 8 HOW INFORMED ABOUT ENERGY-RELATED PROGRAMS BY AGE, HOME TYPE & OWNERSHIP STATUS

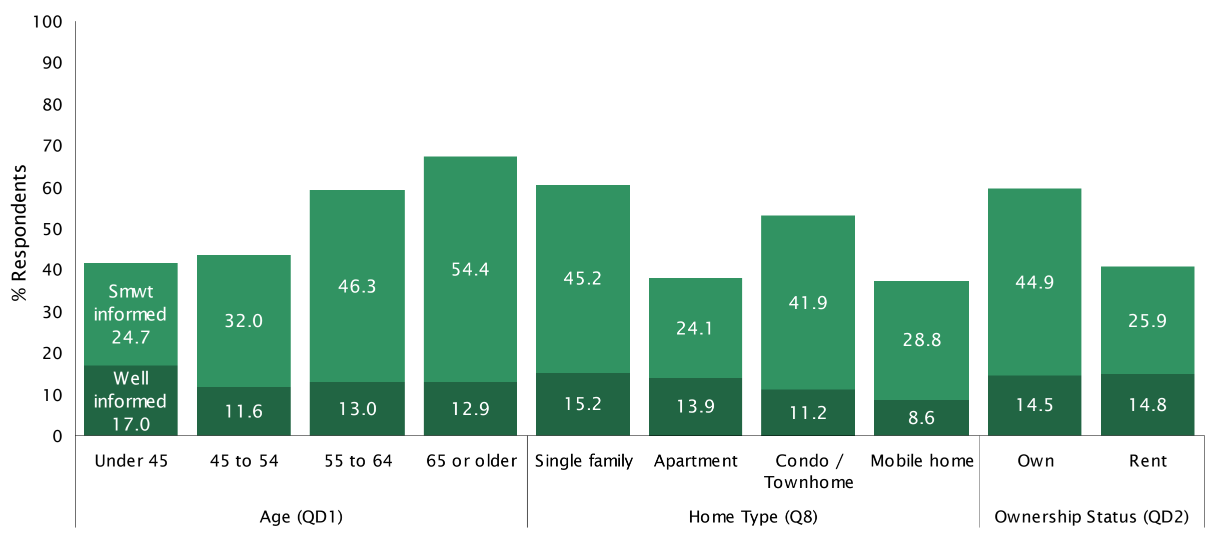


FIGURE 9 HOW INFORMED ABOUT ENERGY-RELATED PROGRAMS BY CUSTOMER CITY & HOUSEHOLD INCOME

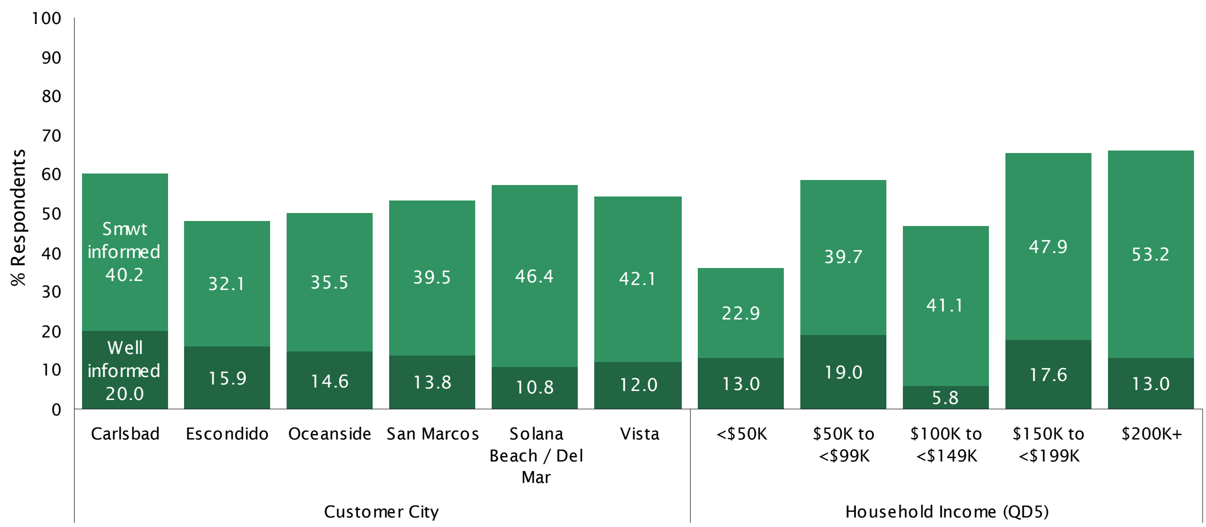
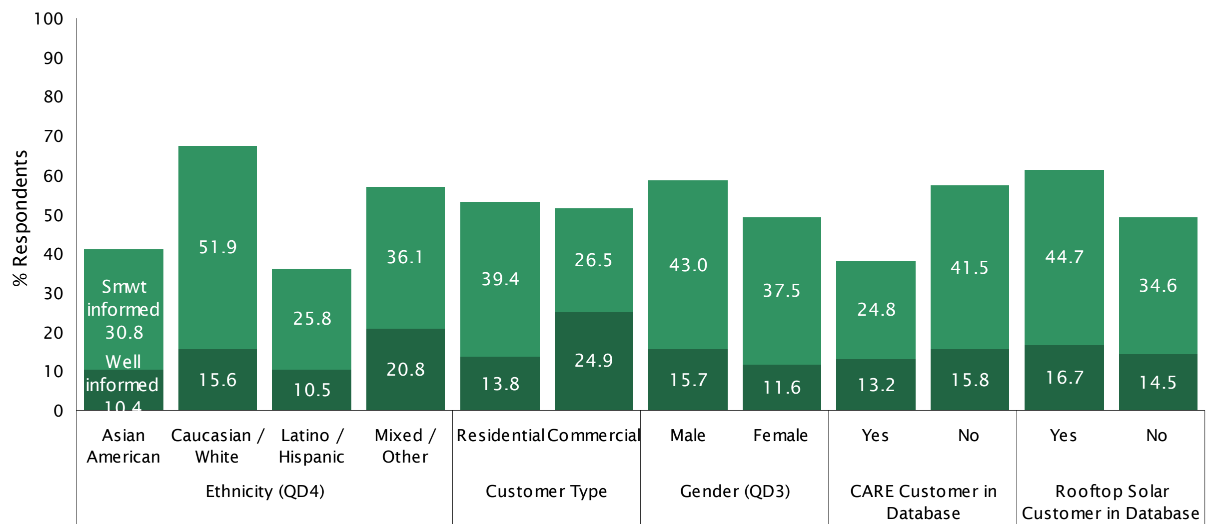


FIGURE 10 HOW INFORMED ABOUT ENERGY-RELATED PROGRAMS BY ETHNICITY, CUSTOMER TYPE, GENDER, CARE CUSTOMER IN DATABASE & ROOFTOP SOLAR CUSTOMER IN DATABASE



AWARENESS OF SPECIFIC PROGRAMS Regardless of how informed customers felt about the availability of energy improvement programs in Question 8, Question 9 presented respondents with a list of 10 specific programs and asked if they were aware of each program prior to taking the survey.[2] Most CEA customers indicated they were aware of discounted rates for energy used during off-peak hours (79%), discounted rates for low-income households (67%), and rebates/incentives to install solar panels and battery storage (61%) prior to taking the survey (see Figure 11). Approximately four-in-ten customers were aware of rebates/incentives to make energy-efficiency improvements to your home/business, such as improved insulation and windows (46%) and to install energy efficient lighting, appliances, and equipment (44%), discounted

2. Programs that only apply to single family homes, condominiums, or townhomes were only asked of customers residing in these types of homes. Similarly, programs that do not apply to commercial customers were not asked of this group.

rates for those who have medical equipment in their home (44%), and free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills (44%).

When compared to the other programs tested, CEA customers were less aware of rebates/incentives to install electric vehicle charging equipment (35%), rebates and incentives to replace gas appliances and equipment with electric appliances and equipment (31%), and programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere (23%). Tables 25-30 show how awareness of each program varied among CEA customer subgroups, with the top three programs highlighted in green for each subgroup.

Question 9 *As I read the following list of programs that may be available in your community, please indicate if you were aware of the program's existence prior to taking the survey.*

FIGURE 11 AWARENESS OF PROGRAMS

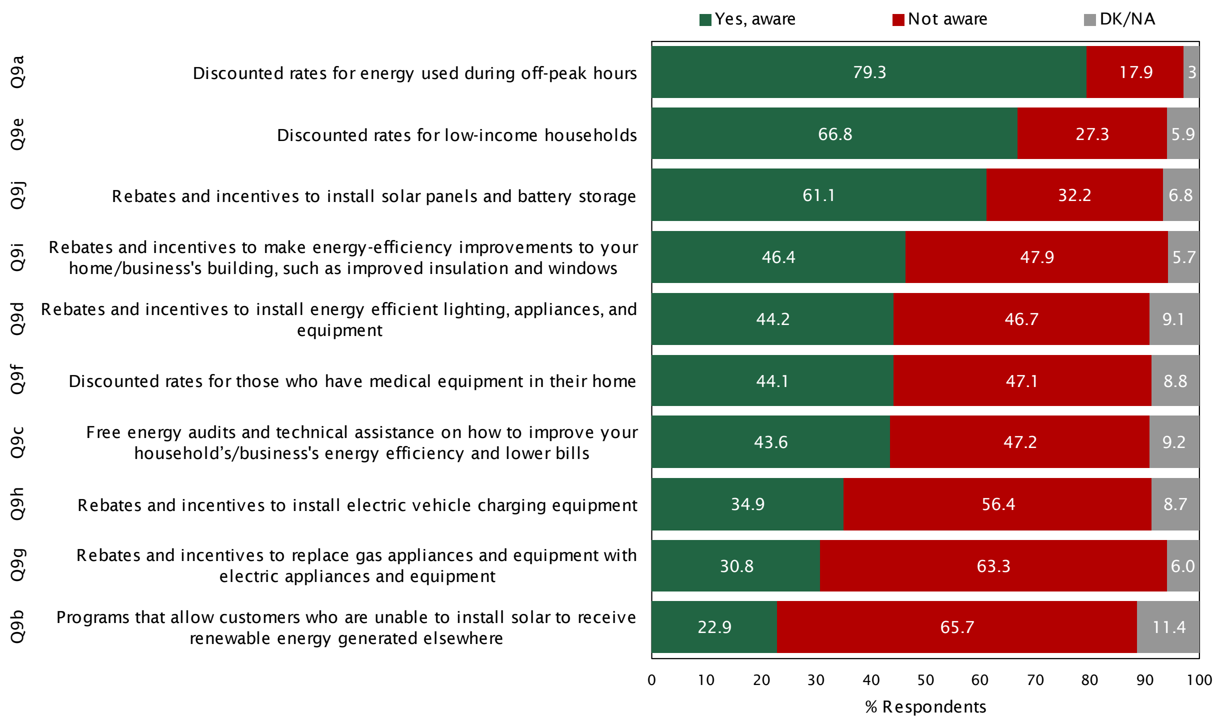


Table 25 Awareness of Programs by Age (Showing % Aware)

	Age (QD1)			
	Under 45	45 to 54	55 to 64	65 or older
Discounted rates for energy used during off-peak hours	80.3	79.1	85.1	82.1
Discounted rates for low-income households	73.0	67.9	69.1	67.9
Rebates and incentives to install solar panels and battery storage	55.9	54.8	65.3	64.5
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	32.8	44.8	42.8	57.8
Rebates and incentives to install energy efficient lighting, appliances, and equipment	46.4	23.2	53.3	49.6
Discounted rates for those who have medical equipment in their home	32.5	26.2	57.5	53.7
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	28.4	37.1	54.7	51.0
Rebates and incentives to install electric vehicle charging equipment	58.0	21.9	42.2	35.5
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	41.7	21.6	28.0	32.4
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	40.8	15.7	31.3	17.3

Table 26 Awareness of Programs by Customer City (Showing % Aware)

	Customer City					
	Carlsbad	Escondido	Oceanside	San Marcos	Solana Beach / Del Mar	Vista
Discounted rates for energy used during off-peak hours	81.7	75.5	85.3	75.4	77.4	75.8
Discounted rates for low-income households	64.8	69.9	61.1	71.3	55.9	72.4
Rebates and incentives to install solar panels and battery storage	67.1	71.3	60.6	56.3	73.1	40.1
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	46.5	44.9	43.7	59.8	57.7	36.1
Rebates and incentives to install energy efficient lighting, appliances, and equipment	48.7	49.5	42.2	48.2	53.5	29.5
Discounted rates for those who have medical equipment in their home	43.7	43.2	43.1	43.1	36.9	49.3
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	53.3	41.7	44.4	44.5	72.7	26.2
Rebates and incentives to install electric vehicle charging equipment	28.0	47.9	34.6	35.5	52.1	20.8
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	23.0	35.9	29.1	35.2	55.0	25.7
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	28.3	23.7	22.0	27.7	21.6	13.4

Table 27 Awareness of Programs by Home Type & Ownership Status (Showing % Aware)

	Home Type (Q8)				Ownership Status (QD2)	
	Single family	Apartment	Condo/ Townhome	Mobile home	Own	Rent
Discounted rates for energy used during off-peak hours	89.0	65.7	82.5	25.0	85.6	70.5
Discounted rates for low-income households	68.7	67.7	61.8	82.1	70.6	62.2
Rebates and incentives to install solar panels and battery storage	68.2	0.0	45.4	0.0	64.2	44.9
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	49.2	0.0	48.8	0.0	47.6	37.0
Rebates and incentives to install energy efficient lighting, appliances, and equipment	47.7	23.4	48.1	20.3	49.5	30.6
Discounted rates for those who have medical equipment in their home	43.1	41.6	49.8	65.0	45.4	41.4
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	47.3	31.9	46.1	11.7	47.9	33.8
Rebates and incentives to install electric vehicle charging equipment	37.9	0.0	31.2	0.0	36.0	27.0
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	31.1	0.0	29.8	0.0	31.7	22.4
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	24.3	18.3	26.5	13.2	24.0	19.1

Table 28 Awareness of Programs by Household Income (Showing % Aware)

	Household Income (QD5)				
	<$50K	$50K to <$99K	$100K to <$149K	$150K to <$199K	$200K+
Discounted rates for energy used during off-peak hours	66.7	79.4	88.3	94.1	87.2
Discounted rates for low-income households	66.2	72.7	63.0	62.7	69.4
Rebates and incentives to install solar panels and battery storage	52.6	59.4	68.6	67.7	65.3
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	42.4	30.2	56.9	63.5	49.4
Rebates and incentives to install energy efficient lighting, appliances, and equipment	27.5	42.1	53.1	56.3	53.4
Discounted rates for those who have medical equipment in their home	36.1	51.2	39.4	44.9	46.7
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	29.8	40.3	49.8	48.3	49.1
Rebates and incentives to install electric vehicle charging equipment	28.3	34.5	32.9	30.5	42.0
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	16.9	25.5	38.3	28.0	38.6
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	15.5	19.0	34.3	28.5	21.7

Table 29 Awareness of Programs by Ethnicity & Customer Type (Showing % Aware)

	Ethnicity (QD4)				Customer Type	
	Asian American	Caucasian / White	Latino / Hispanic	Mixed / Other	Residential	Commercial
Discounted rates for energy used during off-peak hours	96.0	86.9	73.1	76.5	80.0	74.3
Discounted rates for low-income households	55.7	71.9	60.6	69.1	66.8	0.0
Rebates and incentives to install solar panels and battery storage	39.2	70.7	49.2	47.2	62.5	53.5
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	34.6	54.1	35.1	44.2	49.1	32.1
Rebates and incentives to install energy efficient lighting, appliances, and equipment	36.6	51.5	36.5	34.0	43.1	51.7
Discounted rates for those who have medical equipment in their home	40.1	53.5	27.8	54.2	44.1	0.0
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	51.3	51.5	23.1	47.2	42.6	50.5
Rebates and incentives to install electric vehicle charging equipment	34.6	36.7	24.8	35.3	36.2	28.0
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	35.4	30.3	30.2	15.7	30.7	30.8
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	16.5	24.6	18.9	10.3	22.9	22.8

Table 30 Awareness of Programs by Gender, CARE Customer in Database & Rooftop Solar Customer in Database (Showing % Aware)

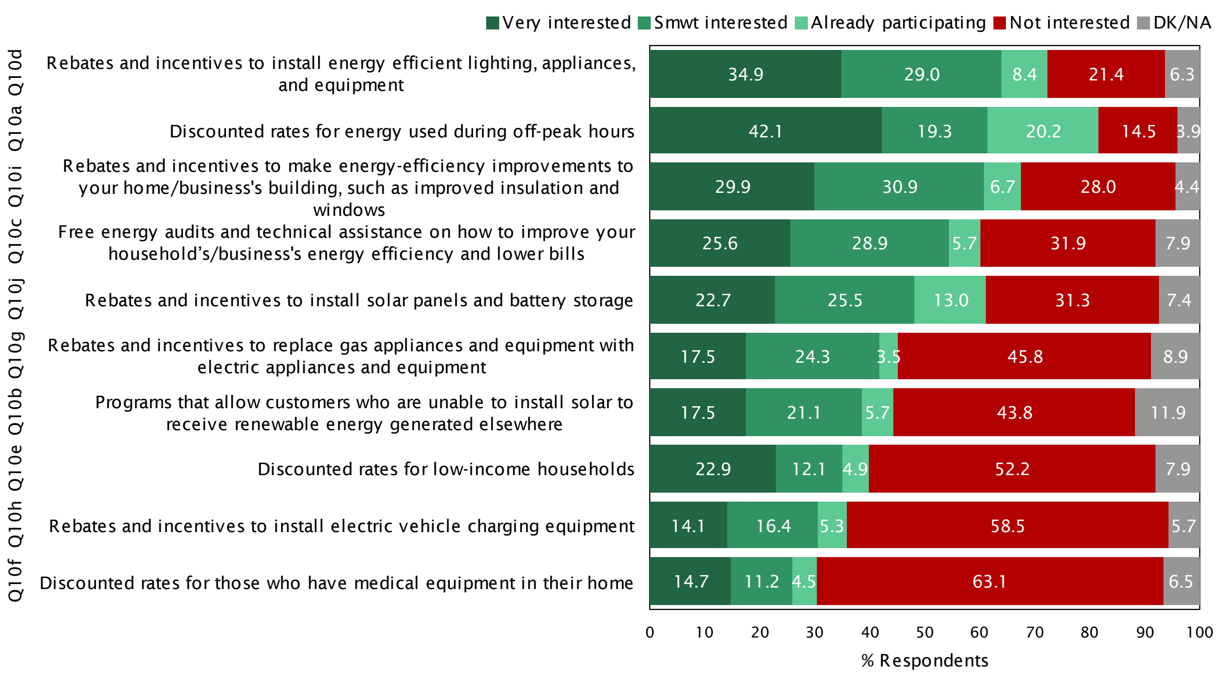
	Gender (QD3)		CARE Customer in Database		Rooftop Solar Customer in Database	
	Male	Female	Yes	No	Yes	No
Discounted rates for energy used during off-peak hours	81.7	77.8	71.0	81.7	86.2	76.1
Discounted rates for low-income households	64.8	68.8	76.6	63.3	62.8	69.0
Rebates and incentives to install solar panels and battery storage	64.1	59.7	49.2	63.1	76.9	51.4
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	50.1	44.9	35.0	48.4	51.9	43.0
Rebates and incentives to install energy efficient lighting, appliances, and equipment	44.2	42.2	29.0	48.7	45.0	43.8
Discounted rates for those who have medical equipment in their home	41.3	46.9	46.3	43.3	35.1	49.0
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	40.3	44.5	30.2	47.6	49.9	40.8
Rebates and incentives to install electric vehicle charging equipment	38.1	30.2	17.1	38.0	37.1	33.6
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	27.8	31.4	19.7	32.7	27.1	33.0
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	24.3	18.8	12.0	26.1	20.5	24.0

INTEREST IN PROGRAMS Irrespective of their prior awareness of the programs, all respondents were next asked how *interested* their household or business would be in participating in the same list of programs. As shown in Figure 12 below, CEA customers expressed the greatest interest in rebates and incentives to install energy efficient lighting, appliances, and equipment (64% very or somewhat interested), discounted rates for energy used during off-peak hours (61%), and rebates and incentives to make energy-efficient improvements to their home/business's building, such as improved insulation and windows (61%). Free energy audits and technical assistance on how to improve their household's/business's energy efficiency and lower bills (55%) and rebates and incentives to install solar panels and batter storage (48%) were also popular with many customers.

At the other end of the spectrum, programs that had a narrow target audience or purpose tended to garner less interest, including discounted rates for those who have medical equipment in their home (26%), rebates and incentives to install electric vehicle charging equipment (31%), and discounted rates for low-income households (35%).

Question 10 *For the same list of programs, please indicate how interested your household/business would be in participating in the program. If your household/business is already participating in the program, please indicate so.*

FIGURE 12 INTEREST IN PROGRAMS



Tables 31-36 show how interest in each program varied across subgroups of CEA customers, with the top three programs of interest within each subgroup highlighted in green to ease comparisons.

Table 31 Interest in Programs by Age (Showing % Very or Somewhat Interested)

	Age (QD1)			
	Under 45	45 to 54	55 to 64	65 or older
Rebates and incentives to install energy efficient lighting, appliances, equipment	87.8	77.6	65.4	58.2
Discounted rates for energy used during off-peak hours	79.5	71.2	51.7	54.5
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	90.8	69.3	68.4	52.6
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	70.0	58.8	60.6	59.0
Rebates and incentives to install solar panels and battery storage	53.8	68.5	60.9	37.9
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	42.6	52.4	48.3	47.2
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	55.0	32.5	28.6	42.7
Discounted rates for low-income households	64.3	34.8	19.1	36.9
Rebates and incentives to install electric vehicle charging equipment	35.3	61.3	28.6	19.9
Discounted rates for those who have medical equipment in their home	28.7	36.5	17.9	33.2

Table 32 Interest in Programs by Customer City (Showing % Very or Somewhat Interested

	Customer City					
	Carlsbad	Escondido	Oceanside	San Marcos	Solana Beach / Del Mar	Vista
Rebates and incentives to install energy efficient lighting, appliances, equipment	72.6	65.7	58.9	54.8	65.1	67.9
Discounted rates for energy used during off-peak hours	59.8	62.7	60.9	62.7	62.9	61.0
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	65.6	58.9	59.5	61.8	60.6	58.4
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	65.3	50.4	53.1	46.7	53.6	57.1
Rebates and incentives to install solar panels and battery storage	44.8	48.6	48.5	59.0	29.5	45.6
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	45.1	39.1	41.9	38.2	40.6	44.6
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	42.2	40.2	39.8	33.0	32.0	37.2
Discounted rates for low-income households	33.4	43.1	27.8	29.7	6.1	49.1
Rebates and incentives to install electric vehicle charging equipment	33.6	25.1	26.2	46.7	18.2	29.4
Discounted rates for those who have medical equipment in their home	21.4	34.1	21.9	21.7	6.1	34.7

Table 33 Interest in Programs by Home Type & Ownership Status (Showing % Very or Somewhat Interested

	Home Type (Q8)				Ownership Status (QD2)	
	Single family	Apartment	Condo/ Townhome	Mobile home	Own	Rent
Rebates and incentives to install energy efficient lighting, appliances, equipment	62.6	81.0	59.9	64.6	62.9	68.0
Discounted rates for energy used during off-peak hours	56.3	85.4	59.2	63.9	55.3	74.6
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	64.0	0.0	52.3	0.0	62.8	53.9
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	52.2	52.2	58.5	63.9	54.3	55.7
Rebates and incentives to install solar panels and battery storage	53.1	0.0	34.2	0.0	50.9	41.2
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	47.2	0.0	34.7	0.0	46.7	26.9
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	24.5	46.0	48.5	60.0	33.6	51.4
Discounted rates for low-income households	25.5	62.7	31.9	56.1	28.5	55.5
Rebates and incentives to install electric vehicle charging equipment	31.6	0.0	27.1	0.0	30.5	30.8
Discounted rates for those who have medical equipment in their home	22.5	36.9	19.0	52.2	22.4	35.7

Table 34 Interest in Programs by Household Income (Showing % Very or Somewhat Interested

	Household Income (QD5)				
	<$50K	$50K to <$99K	$100K to <$149K	$150K to <$199K	$200K+
Rebates and incentives to install energy efficient lighting, appliances, equipment	73.1	71.5	61.6	66.4	61.8
Discounted rates for energy used during off-peak hours	80.8	69.4	58.6	57.7	47.0
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	76.7	65.3	55.4	56.5	62.9
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	69.1	62.9	52.2	51.9	40.4
Rebates and incentives to install solar panels and battery storage	52.1	40.1	45.6	61.1	61.1
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	56.4	45.7	40.8	51.5	37.9
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	40.5	44.8	44.5	37.1	15.6
Discounted rates for low-income households	71.6	58.7	15.3	18.0	14.0
Rebates and incentives to install electric vehicle charging equipment	28.7	21.8	35.1	39.9	39.2
Discounted rates for those who have medical equipment in their home	56.0	27.1	17.9	19.9	9.8

Table 35 Interest in Programs by Ethnicity & Customer Type (Showing % Very or Somewhat Interested

	Ethnicity (QD4)				Customer Type	
	Asian American	Caucasian / White	Latino / Hispanic	Mixed / Other	Residential	Commercial
Rebates and incentives to install energy efficient lighting, appliances, equipment	72.2	59.5	79.6	55.3	65.2	55.1
Discounted rates for energy used during off-peak hours	48.7	54.7	79.6	60.6	62.2	56.1
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	78.0	52.9	73.0	56.2	61.1	59.5
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	60.5	54.1	59.6	56.3	53.8	58.8
Rebates and incentives to install solar panels and battery storage	69.8	44.8	58.6	35.6	48.3	47.5
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	59.9	40.7	51.8	28.6	44.1	29.4
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	60.9	33.3	39.3	26.6	34.8	64.8
Discounted rates for low-income households	36.6	24.8	56.7	41.6	35.0	0.0
Rebates and incentives to install electric vehicle charging equipment	33.7	23.7	47.7	32.2	30.5	30.8
Discounted rates for those who have medical equipment in their home	19.0	24.9	31.6	38.4	25.9	0.0

Table 36 Interest in Programs by Gender, CARE Customer in Database & Rooftop Solar Customer in Database (Showing % Very or Somewhat Interested

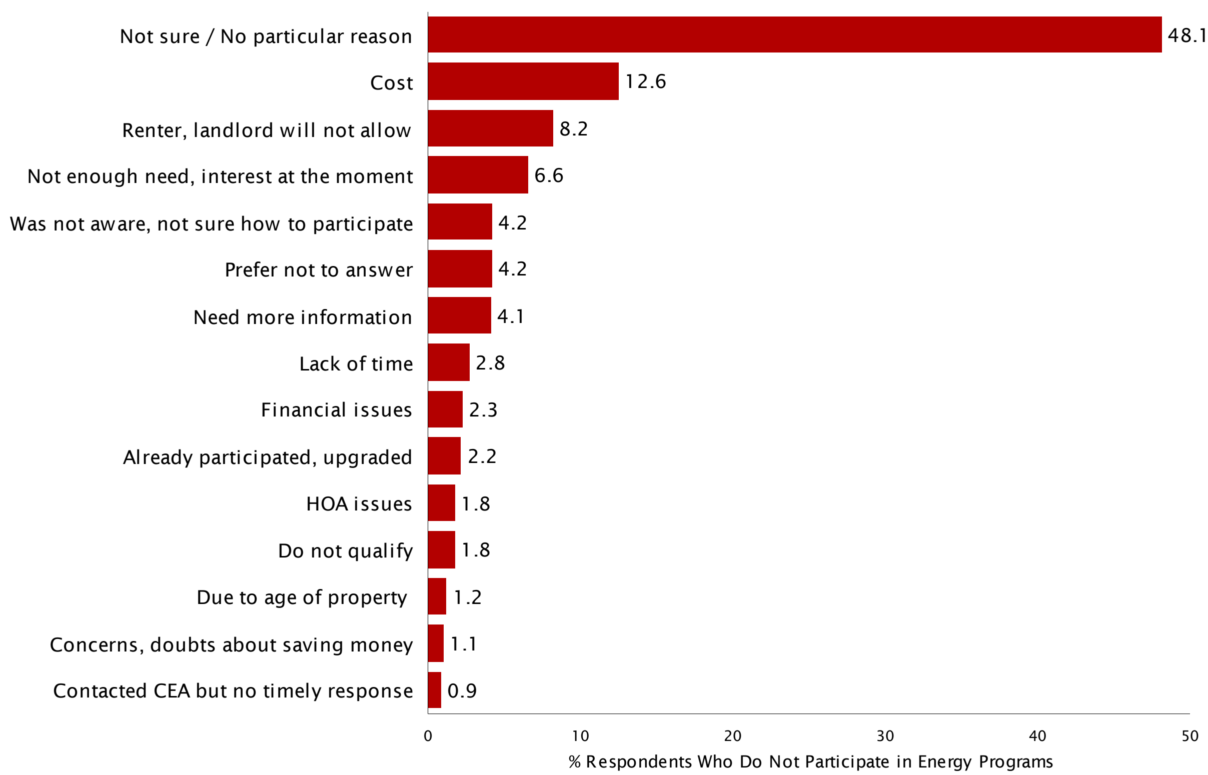
	Gender (QD3)		CARE Customer in Database		Rooftop Solar Customer in Database	
	Male	Female	Yes	No	Yes	No
Rebates and incentives to install energy efficient lighting, appliances, equipment	71.2	60.8	76.0	60.4	65.1	63.4
Discounted rates for energy used during off-peak hours	63.7	61.9	80.6	55.8	55.4	64.2
Rebates and incentives to make energy-efficiency improvements to your home/business's building, such as improved insulation and windows	63.6	58.7	65.5	60.0	58.5	62.2
Free energy audits and technical assistance on how to improve your household's/business's energy efficiency and lower bills	55.9	54.1	58.4	53.3	49.9	56.6
Rebates and incentives to install solar panels and battery storage	57.3	37.6	43.4	49.0	52.5	45.6
Rebates and incentives to replace gas appliances and equipment with electric appliances and equipment	46.8	38.8	60.4	38.5	50.6	36.3
Programs that allow customers who are unable to install solar to receive renewable energy generated elsewhere	33.1	38.2	42.1	37.5	14.2	49.7
Discounted rates for low-income households	37.3	36.7	64.9	24.5	26.3	39.8
Rebates and incentives to install electric vehicle charging equipment	39.5	17.7	40.4	28.8	33.8	28.5
Discounted rates for those who have medical equipment in their home	34.5	18.6	42.1	20.2	23.1	27.5

REASONS FOR NOT PARTICIPATING IN PROGRAMS Respondents who indicated they were previously aware of a program (Question 9) and were interested in the program, but had yet to participate (Question 10), were subsequently asked if there was a particular obstacle or reason keeping them from participating. Question 11 was presented in an open-ended manner so that respondents could cite any obstacle or reason that came to mind without being prompted by or constrained to a particular list of options. True North later reviewed the verbatim respondents and grouped them into the categories shown in Figure 13 below.

Nearly half of respondents (48%) who received Question 11 indicated they weren't sure or there was no particular reason for not participating in the program(s) to date. Among the specific reasons offered, cost was the most common (13%), followed by the fact they are a renter and the landlord would not allow their participation (8%), and they did not have enough need/interest at the moment (7%).

Question 11 *You mentioned your household/business would be interested in participating in certain energy programs, but has yet to do so. Is there a particular obstacle or reason keeping you from participating?*

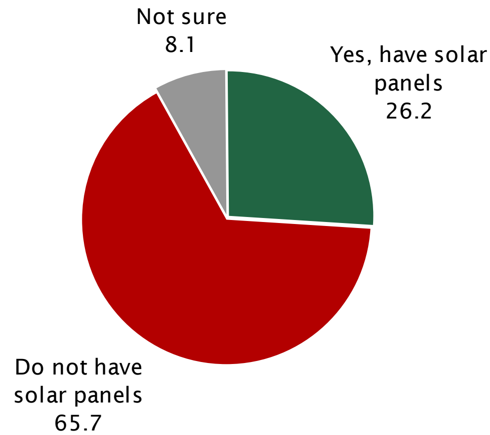
FIGURE 13 REASON, OBSTACLE FOR NOT PARTICIPATING IN ENERGY PROGRAM



COMMUNITY SOLAR PANELS & EV CHARGING STATIONS CEA customers who reside in apartments or mobile homes are often limited in their ability to participate in clean-energy solutions like solar panels, battery storage, and EV charging stations. The decision to make these energy improvements is left to those who own the apartment or complex. Accordingly, the survey asked respondents who live in an apartment or mobile home whether their community has solar panels (Question 12) and an EV charging station(s) (Question 13). Approximately one-quarter of respondents (26%) who fit this housing category indicated their community has solar panels (Figure 14), whereas just 8% reported that their community has one or more EV charging stations (Figure 15).

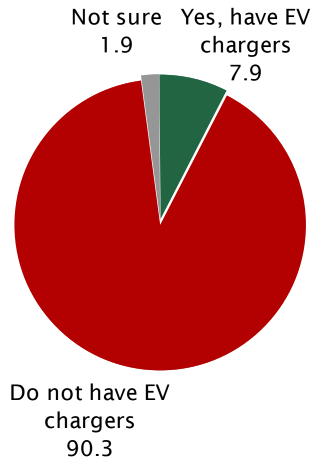
Question 12 *Does your <<apartment | mobile home>> community have solar panels?*

FIGURE 14 SOLAR PANELS AT APARTMENT/MOBILE HOME COMMUNITY



Question 13 *Does your <<apartment | mobile home>> community have electric vehicle chargers?*

FIGURE 15 ELECTRIC VEHICLE CHARGERS AVAILABLE AT APARTMENT/MOBILE HOME COMMUNITY



COMMUNICATION

The final substantive questions of the survey focused on CEA customers' communication habits and preferences, their prior awareness of their status as a CEA customer, as well as any final suggestions they may have for CEA regarding ways to better serve their needs.

PRIMARY INFORMATION SOURCE FOR LOCAL EVENTS & PROGRAMS When asked to describe their *primary* source for information about local events and programs, the Internet in general (not including Social Media) was the most common source (43%), followed by television (20%), social media (14%), and newspapers (9%). Figures 17-20 show how CEA customers' primary information sources varied by subgroup.

Question 14 *Which of the following would you say is your primary source for information about local events and programs?*

FIGURE 16 PRIMARY SOURCE OF INFORMATION

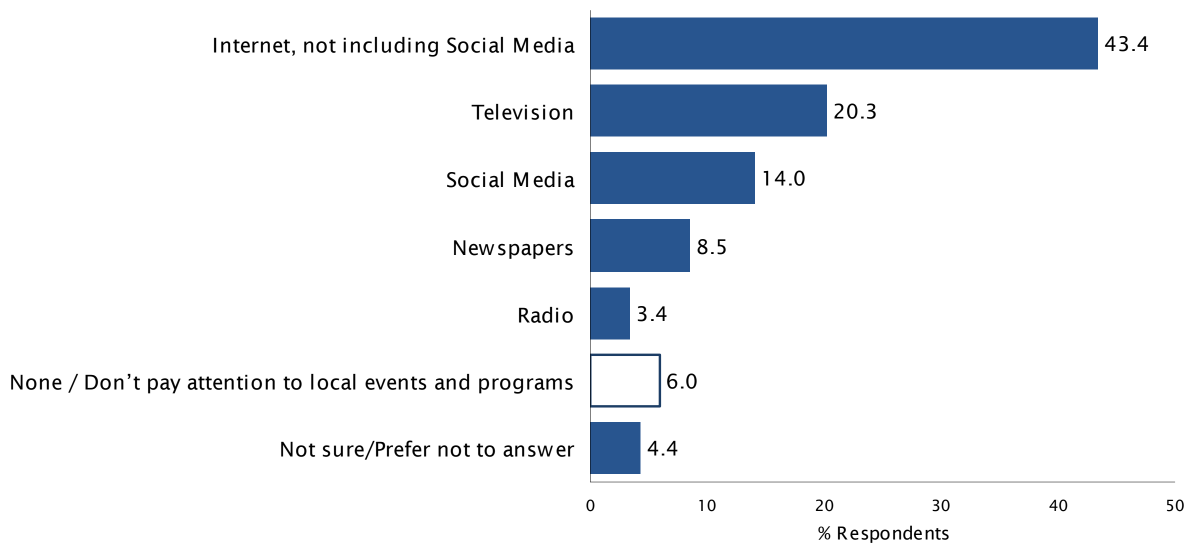


FIGURE 17 PRIMARY SOURCE OF INFORMATION BY HOME TYPE & AGE BY THOSE WHO PROVIDED OPINION

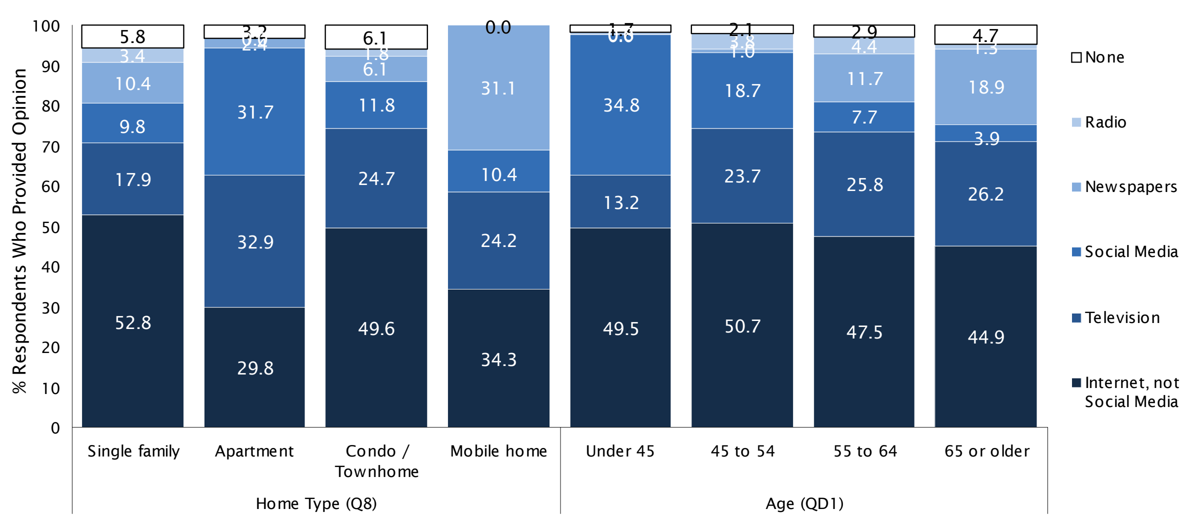


FIGURE 18 PRIMARY SOURCE OF INFORMATION HOW INFORMED ABOUT ENERGY RELATED IMPROVEMENTS & CUSTOMER CITY BY THOSE WHO PROVIDED OPINION

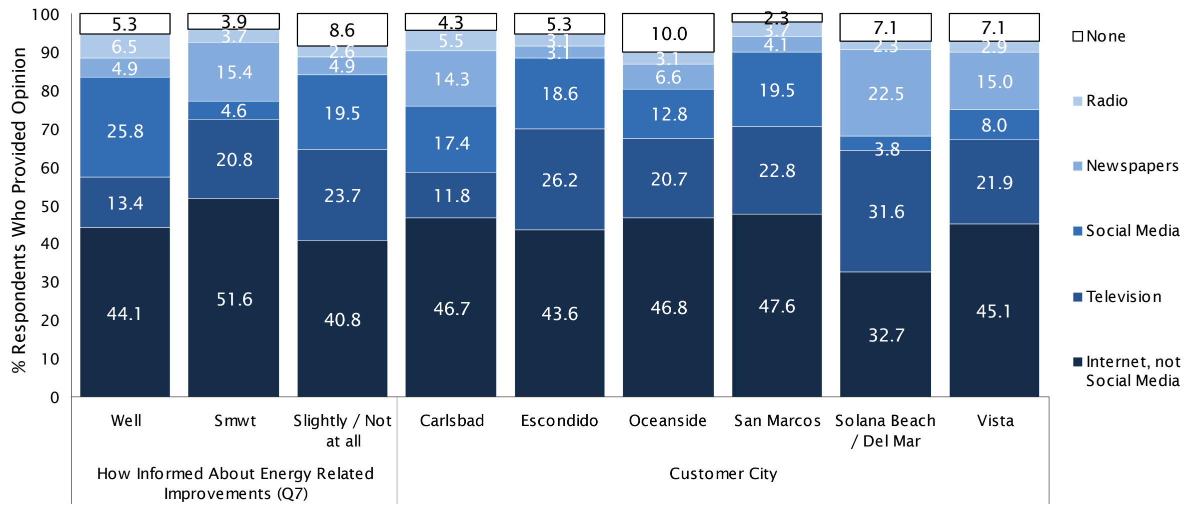


FIGURE 19 PRIMARY SOURCE OF INFORMATION ETHNICITY & HOUSEHOLD INCOME BY THOSE WHO PROVIDED OPINION

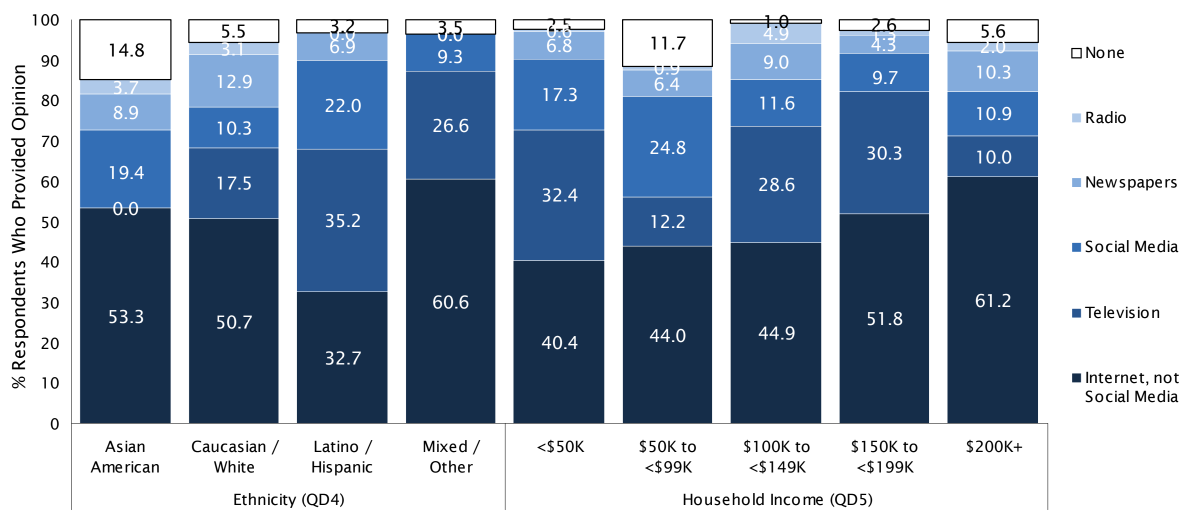
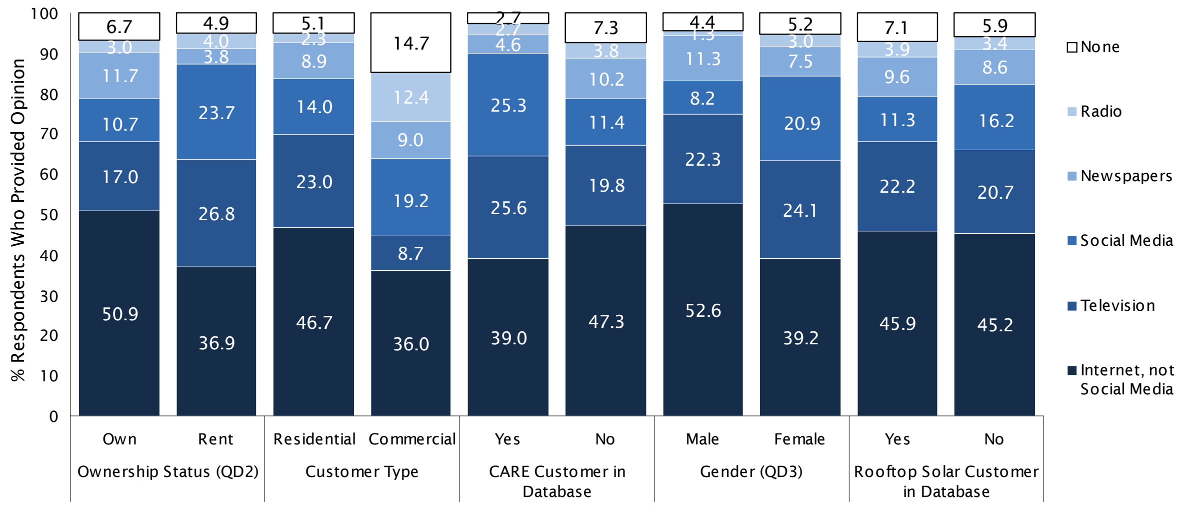


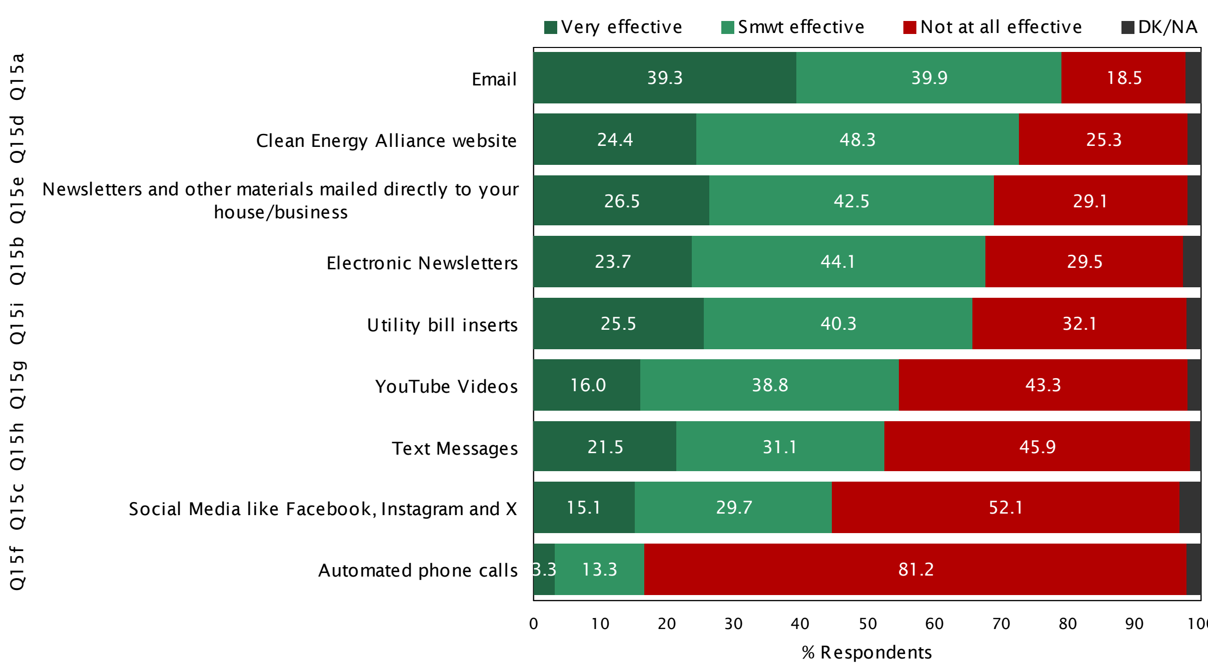
FIGURE 20 PRIMARY SOURCE OF INFORMATION BY OWNERSHIP STATUS, CUSTOMER TYPE, CARE CUSTOMER IN DATABASE, GENDER & ROOFTOP SOLAR CUSTOMER IN DATABASE THOSE WHO PROVIDED OPINION



EFFECTIVE COMMUNICATION METHODS To help CEA identify the most effective means of communicating with customers, it is helpful to understand which methods of communication they prefer. Accordingly, for each of the methods shown to the left of Figure 21, respondents were simply asked to indicate if it would be an effective way for CEA to communicate with them.

Question 15 *As I read the following ways that the Clean Energy Alliance can communicate with customers, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for communicating with you/your business.*

FIGURE 21 EFFECTIVENESS OF COMMUNICATION METHODS



Overall, CEA customers ranked email (79% very or somewhat effective), the Clean Energy Alliance website (73%), direct mail (69%), electronic newsletters (68%), and utility bill inserts (66%) as the most effective methods for CEA to communicate with them. Preferred communication methods varied considerably across CEA subgroups as shown in tables 37-42.

Table 37 Effectiveness of Communication Methods by Age (Showing % Very Effective)

	Age (QD1)			
	Under 45	45 to 54	55 to 64	65 or older
Email	56.6	53.8	32.1	39.8
Newsletters, other materials mailed directly to your house/business	24.7	32.8	27.9	27.5
Utility bill inserts	28.9	23.3	22.9	29.8
Clean Energy Alliance website	32.7	35.7	19.5	24.4
Electronic Newsletters	26.4	28.6	30.1	33.0
Text Messages	33.4	30.9	15.2	18.7
YouTube Videos	27.5	34.8	10.7	8.7
Social Media like Facebook, Instagram and X	28.6	27.1	14.2	6.1
Automated phone calls	4.9	12.1	0.0	0.0

Table 38 Effectiveness of Communication Methods by Customer City (Showing % Very Effective)

	Customer City					
	Carlsbad	Escondido	Oceanside	San Marcos	Solana Beach / Del Mar	Vista
Email	31.6	45.2	36.3	48.4	29.5	39.5
Newsletters, other materials mailed directly to your house/business	27.2	28.2	26.1	18.7	25.7	31.2
Utility bill inserts	24.0	35.8	25.8	23.0	16.4	17.9
Clean Energy Alliance website	25.0	29.6	22.6	21.3	24.9	22.8
Electronic Newsletters	29.4	21.8	19.4	21.4	28.6	27.2
Text Messages	13.2	34.1	18.4	10.2	4.6	33.8
YouTube Videos	12.0	14.5	19.5	23.3	4.7	13.1
Social Media like Facebook, Instagram and X	20.0	9.4	18.5	7.8	7.0	20.0
Automated phone calls	3.3	6.0	1.0	2.2	0.0	5.1

Table 39 Effectiveness of Communication Methods by Home Type & Ownership Status (Showing % Very Effective)

	Home Type (Q8)				Ownership Status (QD2)	
	Single family	Apartment	Condo/ Townhome	Mobile home	Own	Rent
Email	41.7	29.9	55.6	36.7	43.6	33.8
Newsletters, other materials mailed directly to your house/business	24.2	36.0	30.4	53.2	27.0	27.0
Utility bill inserts	25.9	34.1	15.5	44.3	23.1	27.3
Clean Energy Alliance website	24.0	17.3	32.1	54.0	26.1	19.3
Electronic Newsletters	28.2	17.3	28.5	8.6	27.8	15.5
Text Messages	16.9	31.9	25.6	31.1	19.1	26.4
YouTube Videos	16.0	17.1	21.3	6.5	16.0	17.8
Social Media like Facebook, Instagram and X	12.8	22.0	13.5	31.1	13.5	19.5
Automated phone calls	1.1	10.3	1.8	0.0	1.0	8.8

Table 40 Effectiveness of Communication Methods by Household Income (Showing % Very Effective)

	Household Income (QD5)				
	<$50K	$50K to <$99K	$100K to <$149K	$150K to <$199K	$200K+
Email	42.1	45.4	45.3	42.9	40.5
Newsletters, other materials mailed directly to your house/business	39.6	15.2	26.9	19.4	29.5
Utility bill inserts	39.7	22.8	23.7	35.7	6.7
Clean Energy Alliance website	37.1	30.8	17.1	14.0	23.7
Electronic Newsletters	26.0	25.8	18.7	27.5	31.6
Text Messages	42.7	23.2	21.4	10.1	17.1
YouTube Videos	23.9	23.4	16.5	8.7	14.0
Social Media like Facebook, Instagram and X	24.6	28.4	8.4	6.9	11.2
Automated phone calls	5.1	6.6	0.0	1.3	0.0

TABLE 41 EFFECTIVENESS OF COMMUNICATION METHODS BY ETHNICITY & CUSTOMER TYPE (SHOWING % VERY EFFECTIVE)

	Ethnicity (QD4)				Customer Type	
	Asian American	Caucasian / White	Latino / Hispanic	Mixed / Other	Residential	Commercial
Email	52.5	41.2	47.4	35.9	41.4	25.0
Newsletters, other materials mailed directly to your house/business	24.3	27.8	31.6	23.9	27.9	16.6
Utility bill inserts	20.7	24.3	31.1	30.5	26.4	19.2
Clean Energy Alliance website	23.4	18.0	34.8	25.8	25.7	15.4
Electronic Newsletters	22.2	26.2	35.3	19.2	25.9	8.1
Text Messages	16.0	15.9	38.7	23.9	22.2	16.6
YouTube Videos	16.9	10.5	28.6	20.0	16.5	12.7
Social Media like Facebook, Instagram and X	8.1	9.6	28.0	13.4	14.9	16.7
Automated phone calls	0.0	0.7	5.1	10.5	2.8	6.8

TABLE 42 EFFECTIVENESS OF COMMUNICATION METHODS BY GENDER, CARE CUSTOMER IN DATABASE & ROOFTOP SOLAR CUSTOMER IN DATABASE (SHOWING % VERY EFFECTIVE)

	Gender (QD3)		CARE Customer		Rooftop Solar Customer	
	Male	Female	Yes	No	Yes	No
Email	42.5	39.6	48.4	36.7	41.3	38.4
Newsletters, other materials mailed directly to your house/business	25.6	30.2	42.7	21.7	22.5	28.3
Utility bill inserts	24.6	26.5	34.6	22.8	23.2	26.6
Clean Energy Alliance website	26.6	23.1	43.5	18.8	21.4	25.8
Electronic Newsletters	30.7	23.1	24.8	23.3	32.3	19.7
Text Messages	23.9	21.7	44.9	14.6	15.0	24.5
YouTube Videos	18.8	15.0	24.0	13.7	16.3	15.9
Social Media like Facebook, Instagram and X	15.3	15.1	25.1	12.1	14.8	15.2
Automated phone calls	4.2	1.6	8.7	1.7	1.0	4.3

CLEAN ENERGY ALLIANCE CUSTOMER AWARENESS Among respondents who opted into the survey, most (78%) were aware prior to taking the survey that the energy their household or business receives is provided by Clean Energy Alliance (Figure 22). Awareness of being a CEA customer generally increased with age and income, and was highest among those living in single family homes and mobile homes, residents/businesses in Carlsbad, Escondido, Solana Beach and Del Mar, residential customers, males, Asians and Caucasians, those who felt somewhat informed about energy-efficiency programs, customers with rooftop solar, and those who own their residence (see figures 23-26).

Question 16 *Prior to taking this survey, were you aware that the energy your household/business uses is provided by the Clean Energy Alliance?*

FIGURE 22 AWARENESS OF CLEAN ENERGY ALLIANCE

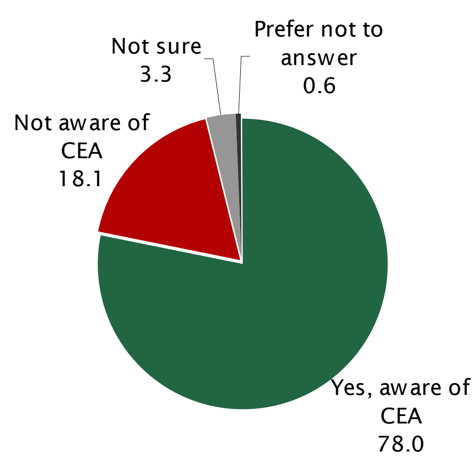


FIGURE 23 AWARENESS OF CLEAN ENERGY ALLIANCE BY AGE & HOME TYPE

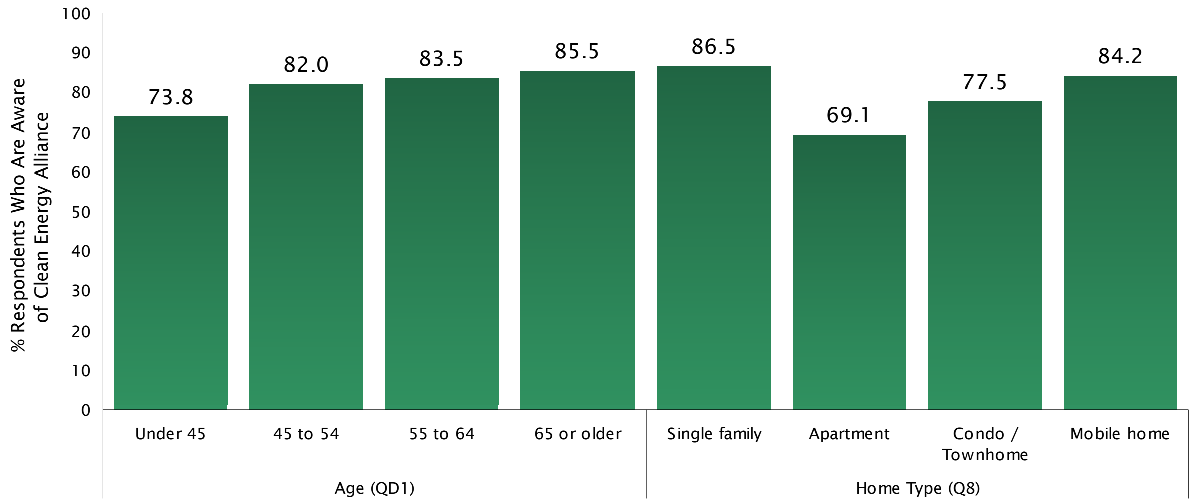


FIGURE 24 AWARENESS OF CLEAN ENERGY ALLIANCE BY CLEAN ENERGY ALLIANCE BY CUSTOMER CITY, CUSTOMER TYPE & GENDER

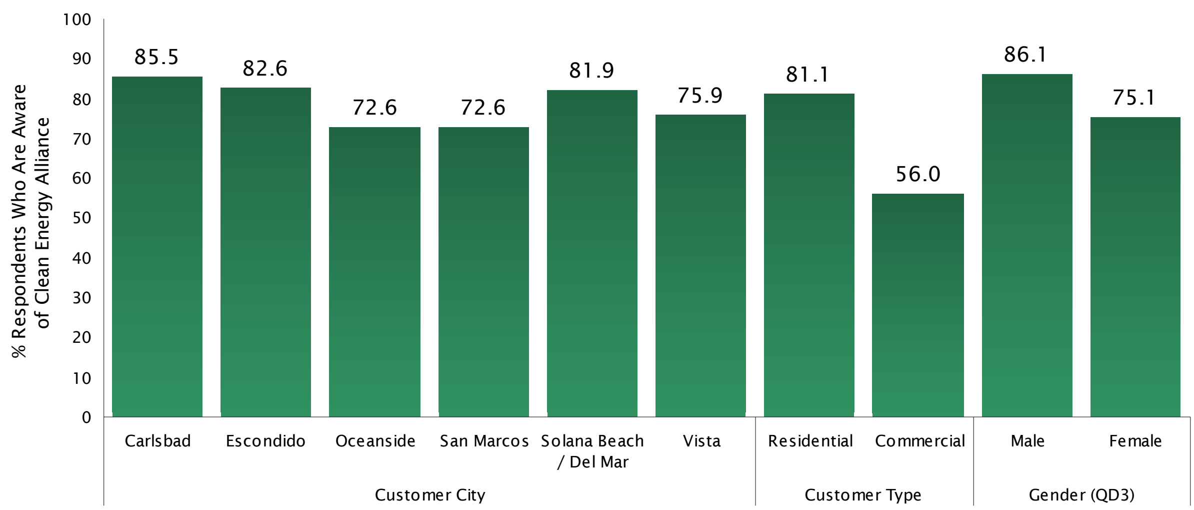


FIGURE 25 AWARENESS OF CLEAN ENERGY ALLIANCE BY CLEAN ENERGY ALLIANCE BY ETHNICITY & HOUSEHOLD INCOME

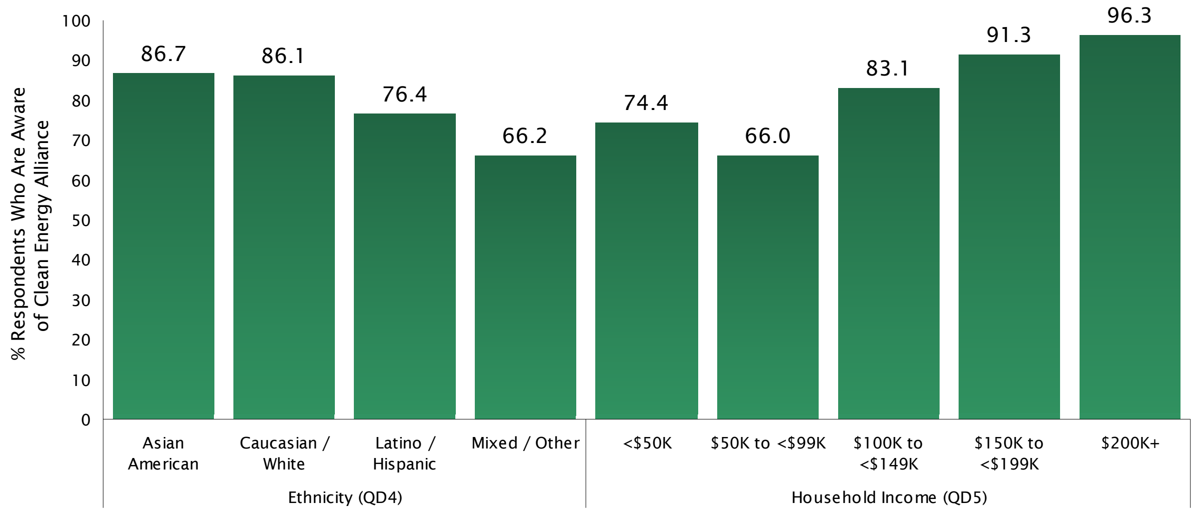
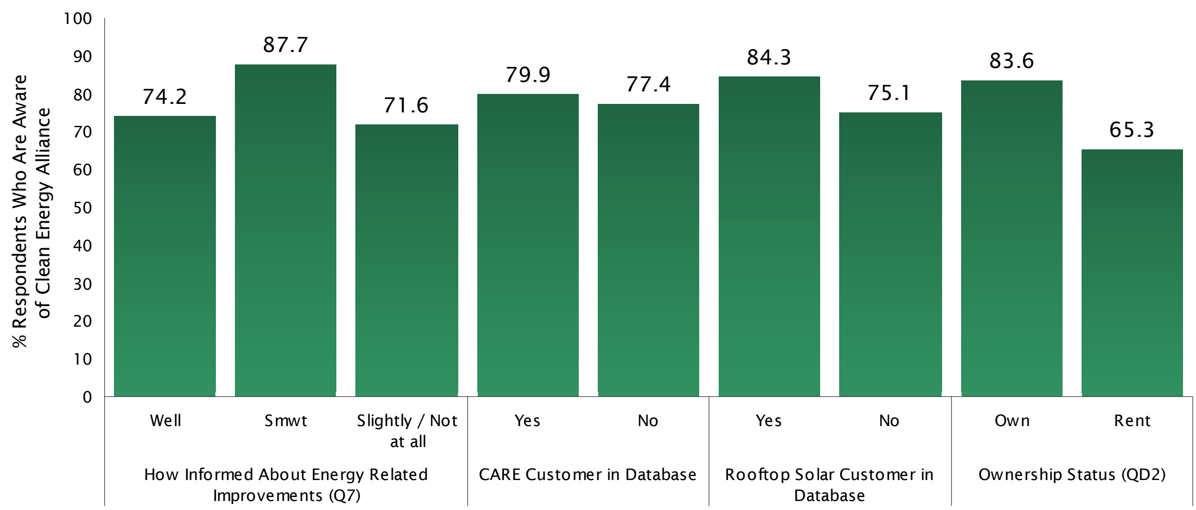


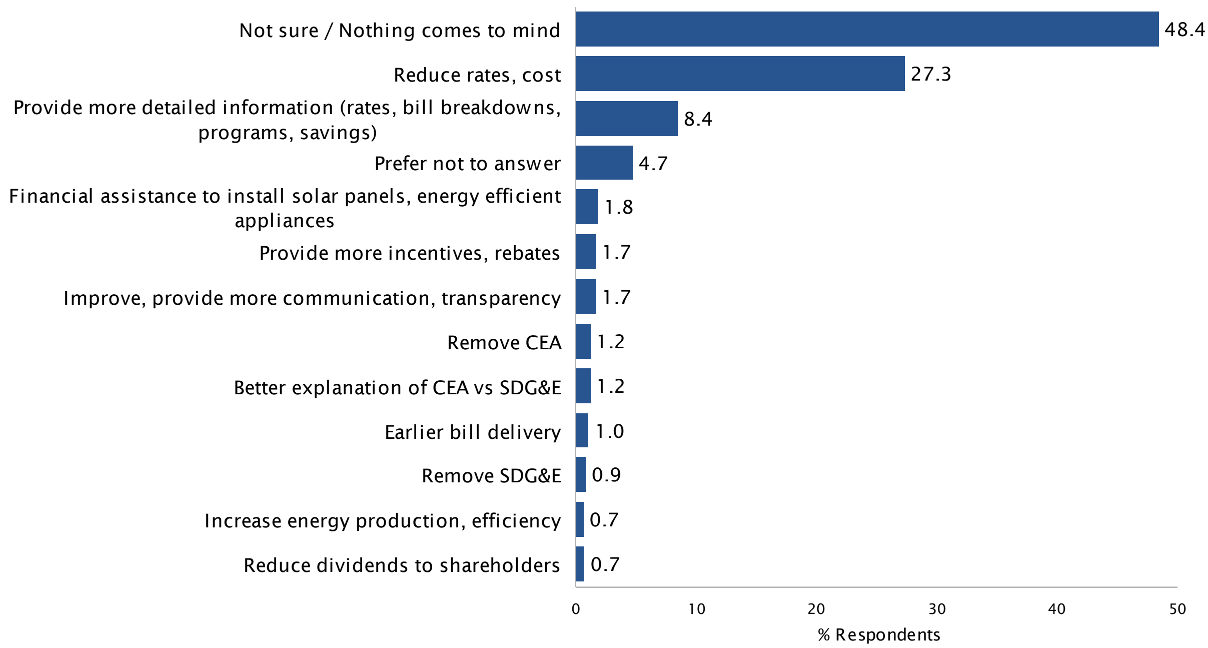
FIGURE 26 AWARENESS OF CLEAN ENERGY ALLIANCE BY CLEAN ENERGY ALLIANCE BY HOW INFORMED ABOUT ENERGY RELATED IMPROVEMENTS, CARE CUSTOMER IN DATABASE, ROOFTOP SOLAR CUSTOMER IN DATABASE & OWNERSHIP STATUS



SUGGESTIONS ON HOW CEA CAN BETTER SERVE The final substantive question of the survey asked customers if they had any suggestions for how Clean Energy Alliance could better serve them/their business. Presented in an open-ended manner, respondents were at liberty to mention any improvement that came to mind without being prompted by or limited to a list of options. True North subsequently reviewed the verbatim comments and grouped them into the categories shown in Figure 27 on the next page. More than half of respondents did not have a suggestion for improvement (48%) or preferred to not answer the question (5%). Among the specific suggestions, reducing rates/costs was the most common (27%), followed by providing more detailed information to customers on topics like rates, bill breakdowns, programs, and savings (8%), and financial assistance for solar panels, energy efficient appliances (2%) or in general (2%).

Question 17 *If the Clean Energy Alliance could do one thing to better serve you/your business, what would that be?*

FIGURE 27 ONE THING CEA COULD DO TO BETTER SERVE CUSTOMERS



Background & Demographics

Table 43 Demographics of Sample

Total Respondents	*509*
Home Type (Q8)	
Single family	50.1
Apartment	15.5
Condo / Townhome	16.9
Mobile home	2.9
Prefer not to answer	14.6
Age (QD1) *Residential only*	
Under 45	15.0
45 to 54	13.2
55 to 64	8.4
65 or older	28.7
Prefer not to answer	34.8
Ownership Status (QD2)	
Own	65.1
Rent	29.9
Prefer not to answer	5.1
Gender (QD3) *Residential only*	
Male	48.3
Female	46.3
Other	1.3
Prefer not to answer	4.1
Ethnicity (QD4) *Residential only*	
Asian American	5.4
Caucasian / White	32.0
Latino / Hispanic	27.2
Mixed / Other	6.0
Prefer not to answer	29.3
Household Income (QD5) *Residential only*	
<$50K	19.3
$50K to <$99K	15.6
$100K to <$149K	14.4
$150K to <$199K	8.9
$200K+	12.3
Prefer not to answer	29.6
Employees at Worksite (QD6) *Commercial only*	
0	5.8
1 to 2	22.2
3 to 5	21.7
6 to 10	13.2
More than 10	31.9
Prefer not to answer	5.3
Customer Type	
Residential	87.5
Commercial	12.5
Customer City	
Carlsbad	18.4
Escondido	20.8
Oceanside	25.9
San Marcos	14.8
Solana Beach / Del Mar	3.8
Vista	16.2
CARE Customer in Database	
Yes	22.8
No	77.2
Rooftop Solar Customer in Database	
Yes	31.4
No	68.6

Table 43 presents the key demographic and background information collected during the survey. The primary motivation for collecting the information was to provide a better insight into how results of the substantive questions of the survey vary by customer characteristics, as well as ensure that the sample aligns with CEA's customer database on key characteristics.

METHODOLOGY

The following sections outline the methodology used in the study, as well as the motivation for using certain techniques.

QUESTIONNAIRE DEVELOPMENT Dr. McLarney of True North Research worked closely with Clean Energy Alliance to develop a questionnaire that covered the topics of interest and avoided many possible sources of systematic measurement error, including position-order effects, wording effects, response-category effects, scaling effects, and priming. Several questions included multiple individual items. Because asking items in a set order can lead to a systematic position bias in responses, items were asked in random order for each respondent.

Some questions asked in this study were presented only to a subset of respondents. For example, only respondents who indicated they live in an apartment or mobile home (Question 8) were asked if their community has solar panels (Question 12) and electric vehicle chargers (Question 13). The questionnaire included with this report (see *Questionnaire & Toplines* on page 42) identifies the skip patterns used during the interview to ensure that each respondent received the appropriate questions.

PROGRAMMING, PRE-TEST & TRANSLATION Prior to fielding the survey, the questionnaire was CATI (Computer Assisted Telephone Interviewing) programmed to assist interviewers when conducting the phone interviews. The CATI program automatically navigates the skip patterns, randomizes the appropriate question items, and alerts interviewers to certain types of keypunching mistakes should they happen during the interview. The survey was also programmed into a passcode-protected online survey application to allow online participation for sampled residents. The integrity of the questionnaire was pre-tested internally by True North and by dialing into random homes in CEA's service area prior to formally beginning the survey. The final residential customer questionnaire was also professionally translated into Spanish to allow for data collection in English and Spanish.

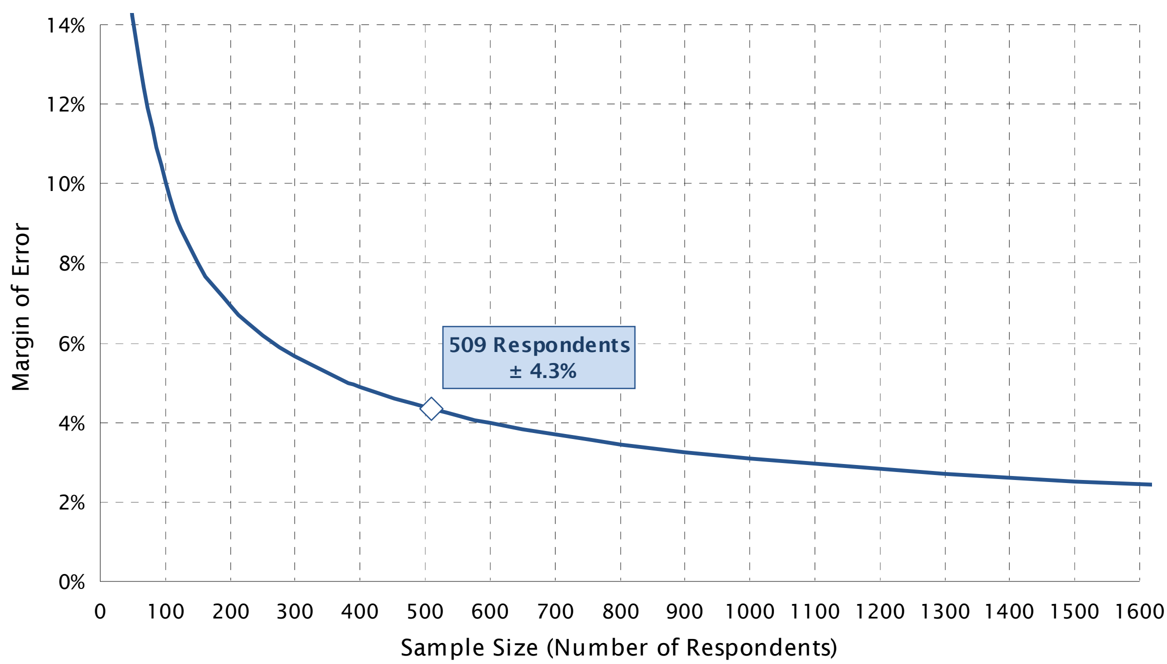
SAMPLE, RECRUITING & DATA COLLECTION Starting with a comprehensive list of residential and commercial customers provided by CEA, True North stratified by member city and account type (residential vs. commercial) to ensure a proportional sample on these dimensions. Customers were then randomly selected within their appropriate strata. Once selected for inclusion in the study, customers were initially invited to participate in the survey online at a secure, passcode-protected website designed and hosted by True North. Customers were recruited using email invitations and text invitations, and each was assigned a unique passcode to ensure that only CEA customers who received an invitation could access the online survey site, and that the survey could be completed only one time per passcode. Email reminder notices were also sent to encourage participation among those who had yet to take the survey. Following a period of online data collection, True North placed calls to land lines and cell phone numbers of residential and commercial customers that had yet to participate in the online survey.

Telephone interviews averaged 16 minutes in length and were conducted during weekday evenings (5:30PM to 9PM) and on weekends (10AM to 5PM) for residential customers, and from 9AM to 5PM weekdays for commercial accounts. A total of 509 surveys were completed among residential (445) and commercial (64) customers between April 9 and April 18, 2025

MARGIN OF ERROR DUE TO SAMPLING The results of the survey can be used to estimate the opinions of all CEA customers. Because not every customer in CEA's service area participated in the survey, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found in the survey of 509 customers for a particular question and what would have been found if all 261,826 CEA customers had been interviewed.

Figure 28 provides a plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response. For this survey, the maximum margin of error is ± 4.3% for questions answered by all 509 respondents.

FIGURE 28 MAXIMUM MARGIN OF ERROR



Within this report, figures and tables show how responses to certain questions varied by demographic characteristics such as age of the respondent, home ownership status, and account type. Figure 28 is thus useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

DATA PROCESSING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing verbatim responses, weighting the data to make minor adjustments to the sample profile, and preparing frequency analyses and crosstabulations.

ROUNDING Numbers that end in 0.5 or higher are rounded up to the nearest whole number, whereas numbers that end in 0.4 or lower are rounded down to the nearest whole number. These same rounding rules are also applied, when needed, to arrive at numbers that include a decimal place in constructing figures and tables. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and charts for a given question. Due to rounding, some figures and narrative include numbers that add to more than or less than 100%.

TRUE NORTH RESEARCH

Clean Energy Alliance Survey
Final Toplines (n=509)
April 2025

Section 1: Introduction to Study
Hi, may I please speak to: _____. Hi, my name is _____ and I'm calling from TNR on behalf of the Clean Energy Alliance, your household's/business' electricity provider. We're conducting a survey of customers about important electricity-related issues and would like to get your opinions.
If needed or doesn't recognize Clean Energy Alliance: The City of <city name> joined with several other North County cities to form the Clean Energy Alliance. Although SDG&E delivers electricity to your home/business and manages billing, the energy your household/business receives is purchased by the Clean Energy Alliance directly from energy suppliers or generated locally.

Section 2: Importance of Issues		
Q1	To begin, what would you say is the *most* important issue or challenge facing your community today? Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Nothing comes to mind	25%
	High cost of living, affordability	20%
	High cost of electricity	11%
	Government / Political issues	9%
	High utility rates	5%
	Climate change / Environmental issues	4%
	Housing availability, affordability	4%
	Economy	3%
	Homelessness	3%
	Inflation	2%
	Traffic	2%
	Public safety	2%
	Infrastructure	2%
	Availability, cost of insurance	2%
	No issues / Everything is fine	2%
	Immigration issues	1%
	High taxes	1%
	Power outages / Grid concerns	1%
	Water concerns	1%

Q2	Next, I'm going to read a list of specific issues. For each one, please tell me how concerned you are about the issue. Here is the (first/next) issue: _____. Would you say you are very concerned, somewhat concerned, slightly concerned, or not at all concerned about this issue?					
	Randomize. Split Sample B1/B2, C1/C2	Very concerned	Somewhat concerned	Slightly concerned	Not at all concerned	Prefer not to answer
A	Cost of living in general	73%	18%	7%	1%	0%
B1	Paying for essentials like food, gas, and electricity	61%	21%	11%	7%	0%
B2	Cost of electricity	68%	22%	6%	4%	0%
C1	Climate change	46%	23%	8%	22%	1%
C2	Greenhouse gas emissions	33%	34%	15%	15%	4%
D	Air pollution	38%	32%	20%	10%	0%
E	Protecting the environment	55%	20%	19%	6%	0%
F	Traffic congestion	38%	37%	18%	7%	0%
G	The pace of construction and development	22%	33%	26%	17%	2%
H	Addressing homelessness	46%	29%	15%	10%	1%

Section 3: Electricity Issues & Priorities

Q3	Turning now to the topic of **energy**, I'm going to read a list of specific issues. For each one, please tell me how important this issue is to you/your business. Here is the (first/next) issue: _____. Do you think this issue is extremely important, very important, somewhat important, or not at all important?						
	Randomize	Extremely important	Very important	Somewhat important	Not at all important	Not sure	Prefer not to answer
A	Creating good-paying jobs in the energy sector	23%	29%	29%	15%	2%	3%
B	Reducing your home's/business' energy costs	55%	26%	15%	4%	0%	0%
C	Receiving a discount on your energy bill if you use less energy during peak periods	44%	24%	20%	8%	2%	2%
D	Addressing climate change by reducing greenhouse gas emissions	35%	28%	20%	13%	2%	1%
E	Having cleaner air to breathe in your home/building	50%	27%	17%	4%	1%	1%
F	Ensuring that low-income households and underserved populations have the same opportunities to transition to clean energy	32%	31%	22%	13%	2%	1%
G	Generating more electricity *locally* through rooftop solar and other small installations	37%	27%	22%	8%	4%	2%
H	Avoiding power outages at your home/business	43%	31%	17%	6%	0%	2%

Q4	Next, I'm going to read a short list of actions that could be taken in the future. As I read each item, please indicate whether you think it should be a high priority, medium priority, or low priority for your community. If you think the action shouldn't be taken, please indicate so. Also, please keep in mind that not all items can be high priorities. Here is the (first/next) one: _____. Should this be a high, medium, or low priority for the future – or should we not take this action?						
	Randomize	High priority	Medium priority	Low priority	Should NOT take this action	Not sure	Prefer not to answer
A	Requiring all new construction to be **all-electric** to improve indoor air quality	22%	24%	20%	25%	7%	2%
B	Increasing the number of **electric cars, trucks, and buses** to reduce greenhouse gas emissions and air pollution	28%	28%	25%	12%	4%	3%
C	Improving the reliability of energy supplies by building **large-scale renewable energy generating systems** locally in the San Diego region	39%	34%	14%	6%	6%	2%
D	Installing more **small-scale renewable energy** systems like solar on home/small business rooftops and parking lots	40%	36%	14%	5%	3%	2%
E	Improving the **energy efficiency of buildings** so they use less energy and have lower energy bills	50%	33%	12%	3%	1%	2%
F	Providing **job training and certification programs** to fill the need for skilled workers in the clean energy sector	38%	38%	14%	6%	2%	1%
G	Helping **low-income families** pay their energy bills	41%	24%	22%	10%	1%	1%
H	Improving access to technical experts who can **advise on energy saving projects** in the home/for businesses	24%	34%	31%	7%	3%	2%
I	Creating more **back-up power** systems that can operate during a power outage	41%	39%	15%	3%	1%	1%
J	Increasing the number of **public access charging stations** for electric vehicles	26%	25%	32%	10%	4%	2%
K	**Incentivizing** customers to better manage energy use during high-demand periods	39%	35%	17%	5%	2%	2%
L	**Upgrading the electric grid and infrastructure,** including undergrounding utility wires, expanding grid capacity, and replacing outdated equipment	60%	25%	9%	0%	3%	2%
M	**Streamlining** the process and shortening the time it takes to connect new solar, back-up batteries, and other renewable energy projects to the grid.	34%	38%	16%	2%	8%	2%

Q5	Is there an energy-related project or program *not* previously mentioned that you think should be a high priority for your community? *If yes, ask:* Please briefly describe it to me. Verbatim responses recorded and later grouped into categories shown below.	
	No other high priorities / Nothing comes to mind	75%
	Reduce electricity rates, bills	7%
	Program to retrofit roof for solar panels	4%
	Prefer not to answer	3%
	Pursue nuclear energy resources	2%
	Educate customers about electricity, usage in general	1%
	Improve, provide battery storage, backup	1%
	Support community solar, backup, energy efficiency efforts	1%
	Pursue more wind, hydroelectric power resources	1%
	Pursue geothermal energy resources	1%
	Improve, address fire prevention measures	1%
	Provide incentives for solar, energy efficiency efforts	1%

Section 4: Energy Improvements & Programs

Q6	Next, I'm going to read a list of energy improvements that can be made to a home/building. For each, please say 'yes' if your current home/business's building has this improvement – 'no' if not.				
	Randomize	Yes	No	Not sure	Prefer not to answer
A	Electric vehicle charging station	21%	73%	3%	3%
B	An electric furnace	20%	66%	12%	2%
C	An electric stove	26%	71%	2%	1%
D	An electric heat pump water heater	22%	62%	14%	2%
E	Solar panels	44%	50%	5%	1%
F	Back-up battery storage	18%	69%	11%	2%
G	Improved insulation, windows, roof, or other weatherization improvements	55%	34%	8%	2%
H	Energy efficient lighting	78%	13%	8%	1%

I	Smart home energy/Building management system that monitors, controls heating/air conditioning, lighting, appliances to optimize performance, reduce energy use		43%	45%	10%	2%
Q7	In general, how informed do you feel about the programs and services that are available to help residents/businesses with energy-related improvements? Would you say you feel well informed, somewhat informed, slightly informed, or not at all informed?					
	1	Well informed	15%			
	2	Somewhat informed	38%			
	3	Slightly informed	32%			
	4	Not at all informed	14%			
	98	Not sure	0%			
	99	Prefer not to answer	1%			
Q8	So that I can limit the following questions to just those that apply to your home, which of the following best describes your current home? *(asked of residents only)*					
	1	Single family detached home	57%			
	2	Apartment	18%			
	3	Condominium or Townhome	19%			
	4	Mobile home	3%			
	99	Prefer not to answer	2%			
Q9	As I read the following list of programs that may be available in your community, please indicate if you were **aware** of the program's existence prior to taking the survey. Here is the (first/next) one: _____.					
	Randomize		Yes, was aware	No, was not aware	Not sure	Prefer not to answer
	All respondents receive items A-F.					
A	**Discounted rates** for energy used during off-peak hours		79%	18%	2%	1%
B	Programs that allow customers who are unable to install solar to receive **renewable energy generated elsewhere**		23%	66%	9%	2%
C	Free **energy audits** and **technical assistance** on how to improve your household's/business' energy efficiency and lower bills		44%	47%	7%	2%
D	Rebates and incentives to install energy efficient **lighting**, **appliances**, and **equipment**		44%	47%	7%	2%
E	Discounted rates for **low-income** households *(asked of residents only)*		67%	27%	5%	1%
F	Discounted rates for those who have **medical equipment** in their home *(asked of residents only)*		44%	47%	7%	2%

	Only ask items G-J if Q8=(1,3)				
G	Rebates and incentives to **replace gas appliances** and equipment with electric appliances and equipment	31%	63%	5%	1%
H	Rebates and incentives to install **electric vehicle charging equipment**	35%	56%	6%	2%
I	Rebates and incentives to make **energy-efficiency improvements to your home/business' building**, such as improved insulation and windows	46%	48%	5%	1%
J	Rebates and incentives to install **solar panels and battery storage**	61%	32%	6%	1%

Q10	For the same list of programs, please indicate how **interested** your household/business would be in participating in the program. If your household/business is *already* participating in the program, please indicate so. Here is the (first/next) one: _____. Would you be very interested, somewhat interested, or not interested in participating in this program?						
	Randomize	Very interested	Somewhat interested	Not interested	Already participating	Not sure	Prefer not to answer
	All respondents receive items A-F.						
A	**Discounted rates** for energy used during off-peak hours	42%	19%	14%	20%	2%	2%
B	Programs that allow customers who are unable to install solar to receive **renewable energy generated elsewhere**	17%	21%	44%	6%	7%	4%
C	Free **energy audits** and **technical assistance** on how to improve your household's/business' energy efficiency and lower bills	26%	29%	32%	6%	5%	3%
D	Rebates and incentives to install energy efficient **lighting**, **appliances**, and **equipment**	35%	29%	21%	8%	4%	3%
E	Discounted rates for **low-income** households *(asked of residents only)*	23%	12%	52%	5%	4%	4%
F	Discounted rates for those who have **medical equipment** in their home *(asked of residents only)*	15%	11%	63%	5%	3%	4%
	Only ask items G-J if Q8=(1,3)						
G	Rebates and incentives to **replace gas appliances** and equipment with electric appliances and equipment	17%	24%	46%	4%	6%	2%
H	Rebates and incentives to install **electric vehicle charging equipment**	14%	16%	58%	5%	3%	2%
I	Rebates and incentives to make **energy-efficiency improvements to your home/business' building**, such as improved insulation and windows	30%	31%	28%	7%	2%	2%

J	Rebates and incentives to install **solar panels and battery storage**	23%	26%	31%	13%	5%	3%

Ask Q11 if Q9=1 AND Q10=(1,2) for any item A-J. Otherwise skip to instruction preceding Q12.

Q11	You mentioned your household/business would be interested in participating in certain energy programs, but has yet to do so. Is there a particular obstacle or reason keeping you from participating? *If yes, ask:* Please briefly describe the reason to me. Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / No particular reason	48%
	Cost	13%
	Renter, landlord will not allow	8%
	Not enough need, interest at the moment	7%
	Need more information	4%
	Was not aware, not sure how to participate	4%
	Prefer not to answer	4%
	Lack of time	3%
	Financial issues	2%
	Do not qualify	2%
	Already participated, upgraded	2%
	HOA issues	2%
	Due to age of property	1%
	Contacted CEA but no timely response	1%
	Concerns, doubts about saving money	1%

Ask Q12 & Q13 if Q8=(2,4). Choose home type based on Q8 answer. Otherwise skip to Q14.

Q12	Does your <<apartment | mobile home>> community have **solar panels**? *(asked of residents only)*		
	1	Yes	26%
	2	No	66%
	98	Not sure	8%
	99	Prefer not to answer	0%
Q13	Does your <<apartment | mobile home>> community have **electric vehicle chargers**? *(asked of residents only)*		
	1	Yes	8%
	2	No	90%
	98	Not sure	2%
	99	Prefer not to answer	0%

Section 5: Communication						
Q14	Which of the following would you say is your **primary** source for information about local events and programs? *Ask items 1-5 in random order.*					
	1	Newspapers	9%			
	2	Television	20%			
	3	Radio	3%			
	4	Internet, not including Social Media	43%			
	5	Social Media	14%			
	6	None/Don't pay attention to local events and programs	6%			
	98	Not sure	3%			
	99	Prefer not to answer	1%			

Q15	As I read the following ways that the Clean Energy Alliance can communicate with customers, I'd like to know if you think they would be a very effective, somewhat effective, or not at all effective way for communicating with <u>you/your business</u>.				
	Randomize	Very	Somewhat	Not at all	Prefer not to answer
A	Email	39%	40%	19%	2%
B	Electronic Newsletters	24%	44%	30%	3%
C	Social Media like Facebook, Instagram and X	15%	30%	52%	3%
D	Clean Energy Alliance website	24%	48%	25%	2%
E	Newsletters and other materials mailed directly to your house/business	26%	43%	29%	2%
F	Automated phone calls	3%	13%	81%	2%
G	YouTube Videos	16%	39%	43%	2%
H	Text Messages	21%	31%	46%	2%
I	Utility bill inserts	26%	40%	32%	2%

Q16	Prior to taking this survey, were you aware that the energy your household/business uses is provided by the Clean Energy Alliance?		
	1	Yes	78%
	2	No	18%
	98	Not sure	3%
	99	Prefer not to answer	1%

Q17	If the Clean Energy Alliance could do *one* thing to better serve you/your business, what would that be? Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Nothing comes to mind	48%
	Reduce rates, cost	27%
	Provide more detailed information (rates, bill breakdowns, programs, savings)	8%
	Prefer not to answer	5%
	Financial assistance to install solar panels, energy efficient appliances	2%
	Improve, provide more communication, transparency	2%
	Provide more incentives, rebates	2%
	Reduce dividends to shareholders	1%
	Better explanation of CEA vs SDG&E	1%
	Increase energy production, efficiency	1%
	Remove SDG&E	1%
	Remove CEA	1%
	Earlier bill delivery	1%

Section 6: Background & Demographics

Thank you so much for your participation. I have just a few background questions for statistical purposes.

D1	In what year were you born? *(asked of residents only)* Year coded into age categories shown below.	
	Under 35	8%
	35 to 44	9%
	45 to 54	15%
	55 to 64	10%
	65 or older	33%
	Prefer not to answer	25%

D2	Do you own or rent your current residence/lease the building your business is in?		
	1	Own	65%
	2	Rent	30%
	99	Prefer not to answer	5%

D3	What is your gender? *(asked of residents only)*		
	1	Male	48%
	2	Female	46%
	3	Other	1%
	99	Prefer not to answer	4%
D4	What ethnic group do you consider yourself a part of or feel closest to*? (asked of residents only)*		
	1	African-American/Black	2%
	2	American Indian or Alaskan Native	<1%
	3	**Asian** -- Korean, Japanese, Chinese, Vietnamese, Indian, Filipino or other Asian	6%
	4	Caucasian/White	37%
	5	Latino/Hispanic	31%
	6	Middle Eastern	<1%
	7	Pacific Islander	1%
	8	Mixed Heritage	2%
	98	Other	1%
	99	Prefer not to answer	19%
D5	This last question is for statistical purposes only. As I read the following income categories, please stop me when I reach the category that best represents your household's total annual income before taxes. *(asked of residents only)*		
	1	Under $50,000	22%
	2	$50,000 to less than $100,000	18%
	3	$100,000 to less than $150,000	17%
	4	$150,000 or $200,000	10%
	5	More than $200,000	14%
	98	Not sure	0%
	99	Prefer not to answer	19%

D6	How many people are currently employed at your worksite? *(asked of businesses only)*	
1	0	6%
2	1 to 2	22%
3	3 to 5	22%
4	6 to 10	13%
5	More than 10	32%
98	Prefer not to answer	5%

Thanks so much for participating in this important survey! This survey was conducted for the Clean Energy Alliance.

Post-Interview & Sample Items

S1	Customer Type	
	Residential	87%
	Commercial	13%

S2	Customer City	
	Carlsbad	18%
	Del Mar	1%
	Escondido	21%
	Oceanside	26%
	San Marcos	15%
	Solana Beach	3%
	Vista	16%

S3	CARE Customer in Database	
	Yes	23%
	No	77%

S4	Rooftop Solar Customer in Database	
	Yes	31%
	No	69%

Community Conversations
Let's Talk About Your Energy Needs
Community Workshops Report

Report prepared by Universidad Popular
Authors: Dr. Arcela Nuñez & Natalie Aguilar
December 21, 2025

Contents

INTRODUCTION

The **Community Conversations: Let's Talk About Your Energy Needs** is the result of a partnership between Clean Energy Alliance, Universidad Popular, and community members from across North County.

Universidad Popular was engaged by the Clean Energy Alliance to co-facilitate a series of community workshops scheduled between September and November 2025. The purpose of these sessions was to create a forum where community members could express their perspectives and contribute to shaping the direction of energy programs within CEA's service area. The structured dialogues addressed key topics, including an analysis of Community Needs Survey results, assessment of customer energy requirements and associated challenges, identification of preferred energy and energy efficiency initiatives, visions for the sector's future, and strategies for knowledge sharing.

ACKNOWLEDGEMENTS

This project was developed with community members and customers of Clean Energy Alliance in mind. More specifically, the primary goal was to reach individuals who are hard to reach and engage in civic opportunities. Numerous individuals, cities, agencies, and organizations provided invaluable expertise and input during the development of the project scope and methodology and the development of the summary report. In particular, we thank and acknowledge the following:

Clean Energy Alliance (CEA): Greg Wade, Chief Executive Officer, Rob Howard, Key Accounts/Program Manager, Kaitlin McGee, Key Accounts/Program Manager, Karen Villaseñor, Programs Analyst, Tiffany Reynolds, Key Accounts Analyst and other staff for working closely with Universidad Popular to plan, design and implement the community workshops.

Also, thank you to the Board of Directors who attended the community workshops including Katie Melendez, Chair, City of Vista Council Member, Christian Garcia, Vice Chair, City of Escondido Council Member, María Nuñez, Board Member, City of San Marcos Council Member, and David A. Zito, Alternate Board Member, City of Solana Beach Council Member.

Additionally, thank you to the Community Advisory Committee (CAC) members who attended the community workshops and shared updates and information with community members including John Mosher, City of San Marcos and Daniel Dominquez, City of Oceanside.

Thank you to the cities of Escondido, San Marcos, Carlsbad, Vista, Oceanside, and Solana Beach for providing meeting space and assisting with outreach.

Universidad Popular (UP): The authors thank the UP team for overall support on this project including community outreach, education, engagement, data collection, data entry, data analysis, facilitation, and report preparation.

Interpreter: Thank you to Mario Garcia for providing interpretation services in English and Spanish during the community workshops.

Special appreciation to more than 211 participants who attendees the community workshops and shared their opinions and provided valuable input.

OVERVIEW

Beginning July 2025, Universidad Popular (UP) and Clean Energy Alliance (CEA) initiated a dialogue to assess the feasibility of conducting a series of community workshops, planning, goals, and timeline. CEA shared interest in reaching community members to hear their energy-related challenges and seek input regarding future programs, rebates, and incentives. UP provided an overview of outreach and education pedagogy and engagement strategies. After several planning meetings, UP and CEA agreed to move forward with implementation of the community workshops.

Initially, only a limited number of workshops were planned. Following the successful completion of the first two sessions and subsequent requests from community members in other cities seeking increased accessibility through local events, further in-person and virtual workshops were organized throughout CEA's service area in North County.

A Total of six (6) in-person bilingual (English/Spanish) workshops were held from September to November 2025 in the cities of Escondido, San Marcos, Carlsbad, Vista, Oceanside, and Solana Beach. Two (2) virtual workshops were also held in English and Spanish.

Table 1: Community Conversations

Date	Location	# of Attendees
9/8/25	Escondido	36
9/16/25	San Marcos	88
9/17/25	Carlsbad	19
9/24/25	Online - Spanish	7
9/24/25	Online - English	7
10/20/25	Vista	22
11/5/25	Oceanside	19
11/6/25	Solana Beach	13
Total		211

UP and CEA developed and prioritized the workshop content for the target communities. Materials developed for the workshops included a workshop guide for facilitators, community survey to assessment, and PowerPoint presentations in English and Spanish to use during the workshops. The workshop content provided introductory overviews of Universidad Popular and Clean Energy Alliance. The presentation on Universidad Popular highlighted the organization's history, outreach and education programming, and culturally/linguistically responsive approaches. The presentation on CEA included background information about CEA's history, service areas, Joint Powers Agency, how CEA works, key information to know as customer, energy plan options, and questions/answers regarding programs.

In addition to the general presentations, each workshop included a facilitated roundtable conversation in small groups in a primary language (English/Spanish) and provided interpretation as needed by participants. The conversation portion of the workshop provided a platform for community members to voice their opinions and provide input regarding energy programs in CEA's service territory. Each group was led by a trained facilitator who guided the conversation in English or Spanish and a notetaker who transcribed notes. Facilitators guided the conversation through structured questions centered around the following key areas: results from the Community Needs Survey, understanding customer energy needs and identifying challenges, desired energy and energy efficiency programs, visions for the future, and existing knowledge sharing.

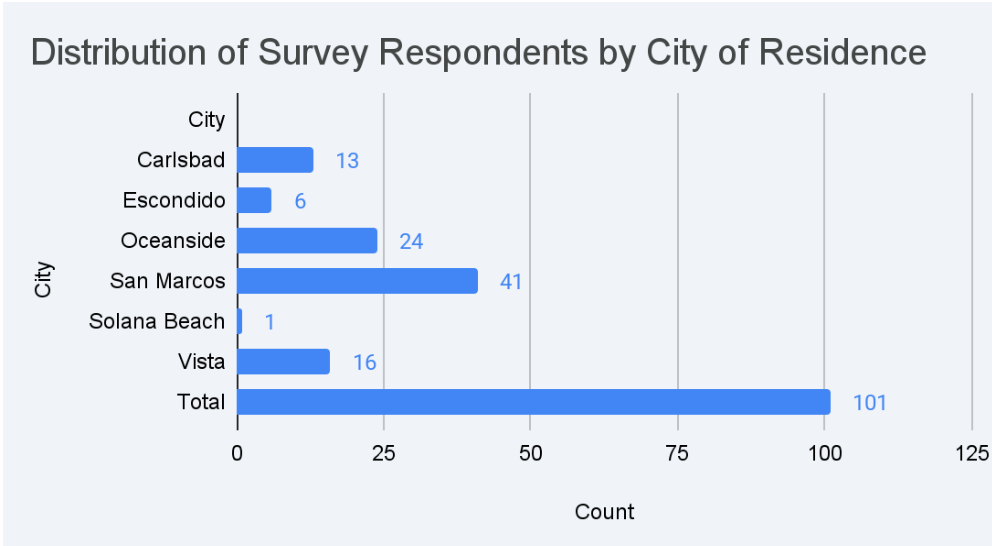
This report summarizes survey and workshop findings, key insights and feedback by session.

OVERALL SURVEY RESULTS

Workshop participants were asked to complete a brief survey reporting on what city they live in, whether they rent or own their home, whether they are business owners and if so, what city their business is in and if they are CEA customers. A total of 101 (N=101) surveys were collected. Below is a summary of responses:

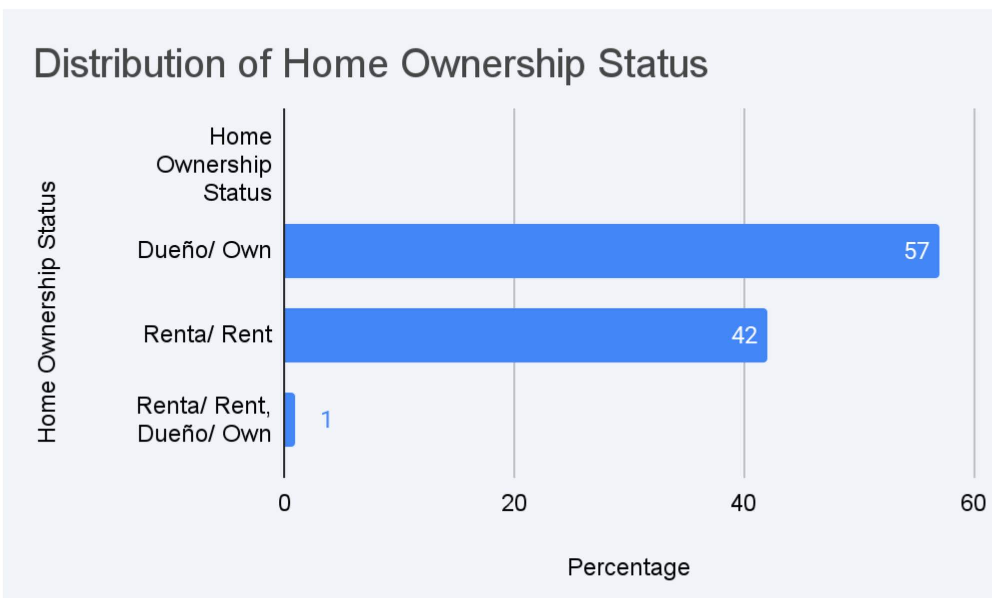
Survey respondents reported living in Carlsbad, Escondido, San Marcos, Solana Beach, and Vista.

Figure 1: Survey Respondents by City of Residence



Most survey respondents reported owning their homes (N=57) and 42 participants are renters.

Figure 2: Distribution of Home Ownership versus Renters



SUMMARY OF INPUT FROM COMMUNITY WORKSHOPS

Section 1: Understanding Customer Priorities

Workshop participants were provided with the following explanation and questions to understand factors that matter most to consumers and the priority that most influences their decisions around energy use.

When it comes to energy, people value different things. Some might focus on keeping costs low, while others care more about environmental impacts or having reliable service. These questions help us understand what matters most to you when it comes to energy.

a) *When thinking about energy, what matters most to you? For example:*
   - *Affordability: How much energy costs.*
   - *Sustainability: Using energy in ways that protect the environment. Reliability: Having consistent access to energy without frequent outages.*
   - *Access: Being able to get energy and participate in programs.*
   - *Other*

b) *Which priority most influences your decisions around energy use?*

Response Summary for Section 1: Customer Priorities

Affordability emerged as the leading priority among participants across all cities.

Table 2: Customer Priorities	
Escondido Workshop	In Escondido, participants expressed a pronounced interest in saving money and voiced concerns regarding excessive costs. Community members requested additional information and educational resources about CEA programs, with particular emphasis on resources for renters. Concerns were also raised about the reliability of older appliances and their energy consumption, potential fraud associated with solar energy, and there was evident interest in solar solutions.
San Marcos Workshop	The primary concern among community members in San Marcos centered on cost, including themes of financial savings and increasing expenses. One group advised interest in learning more about energy-efficient appliances, while another indicated insufficient knowledge about clean energy, though they acknowledged its relevance and the need for further information. Participants described efforts to reduce energy use, such as turning off appliances, switching off lights, turning off the television, and operating washing machines during nighttime hours. Another group highlighted that residents of

	mobile homes often lack access to billing or the ability to make enrollment decisions independently.
Carlsbad Workshop	Both discussion groups in Carlsbad underscored the importance of cost reduction, along with other priorities such as affordability, sustainability, reliability, and access. Additional feedback included skepticism towards supporting shareholders and suggestions to explore small-scale wind energy options.
Online Workshop – English	Participants emphasized the significance of understanding various energy sources and discussed environmental justice issues.
Online Workshop – Spanish	Priorities identified by participants included cost management, reducing energy consumption, clean energy adoption, and family well-being.
Vista Workshop	All three discussion groups in Vista ranked cost as the principal concern. Specific comments included apprehension about rising expenses and references to substantial monthly bills (e.g., $1,030 for one business owner). The business group also noted a desire for clearer billing and highlighted clean energy and solar support as organizational priorities, although assistance is needed.
Oceanside Workshop	Cost and escalating energy prices were consistent concerns across all three discussion groups in Oceanside. While sustainability, reliability, and access were acknowledged, one group remarked that prohibitive costs limit capacity to engage with these issues. Reported monthly bills ranged from $85 to $255. Some participants avoid using lights between 4 to 9 pm to manage costs. Recommendations included hosting more workshops at libraries and schools, distributing information via bill inserts, and increasing program promotion through social media and email.
Solana Beach Workshop	Although the City of Solana Beach has set an objective for 100% renewable electricity, the predominant concern remains cost and affordability, with balancing expense and renewable priorities being a key issue. Reliability is crucial, particularly for individuals with medical needs; one participant experienced an eight-hour outage resulting in food loss. Reliable AC and heating systems were also cited as important. Additionally, time-of-use factors have a significant influence on energy consumption decisions.

Summary of Customer Priorities

Across all workshops, affordability was identified as the top priority for participants when it comes to energy use. Concerns about excessive costs were prevalent in every city, with additional interests in energy efficiency, reliability, sustainability, and access to programs. Many participants expressed a need for more information and resources, especially for renters, and highlighted issues related to older appliances and challenges with clean energy adoption. Reliability and time-of-use were noted as important considerations, particularly for those with medical needs or high energy bills.

Section 2: Identifying Energy-Related Issues and Barriers

Workshop participants were provided with the following explanation and questions to understand factors the types of barriers customers face when it comes to energy at home or in their business. They were also asked if they have considered making improvements to reduce energy use or to name specific barriers that prevent them from making energy improvements.

Whether you're a homeowner, renter or business owner, energy use can come with challenges. The following questions help us understand what types of barriers you face when it comes to energy.

a) *What are the biggest challenges you face when it comes to energy use at home or in your business? For example, high bills, outdated equipment that is not energy efficient, limited control on energy choices due to renting or inconsistent service.*
b) *Have you considered making energy improvements in your household? Are you able to? (renter vs. homeowner vs. business) For example, upgrading insulation, installing solar panels, switching to energy-efficient appliances.*
c) *Are there specific barriers that prevent you from making energy improvements? For example, cost of upgrades, lack of information, limited access to technology or not knowing your options.*

Response Summary for Section 2: Energy-Related Issues and Barriers

Participants identified several barriers to energy improvements, including tenancy status, high energy costs, outdated appliances, insufficient financial resources, unfamiliarity with available programs and technologies, and limited knowledge about innovation.

Table 3: Energy-Related Issues and Barriers	
Escondido Workshop	Community members cited renting as a significant obstacle to implementing household energy upgrades. The quality and efficiency of appliances for renters is dependent on the landlords and leasing companies. Additionally, qualifying for low-income assistance programs was described as challenging. Aging infrastructure contributed to excessive energy consumption, and replacing or

	servicing appliances such as pipes and air conditioning units in multi-family housing was deemed expensive. Concerns regarding solar installations included lengthy permitting processes, elevated costs, inadequate insurance coverage, and insufficient information. Further barriers noted were escalating utility bills, limited technological literacy, uncertainty about available options, and the necessity to disconnect certain appliances. Interest in window replacement was expressed, and one member reported an annual energy bill of $5,000.
San Marcos Workshop	Key challenges included high energy bills relative to income levels, lack of insulation, absence of air conditioning and heating, and minimal impact from window upgrades. Renters indicated that their options are subject to landlord decisions regarding temperature control, cable inspections, and appliance replacements. Old appliances remain prevalent and inefficient; although participants showed interest in upgrading, there is a need for additional information. Some members expressed interest in solar panels and window upgrades but highlighted concerns about affordability and limited information. Groups also reported financial and time constraints associated with making upgrades. Despite apartment complexes installing solar panels, residents sometimes pay more than they consume and are enrolled in CARE programs. Other issues raised included insufficient follow-through on SDGE programs, costly roof replacements required for solar, and confusion over Tesla technology and CEA enrollment. Routine energy-saving behaviors, such as turning off refrigerators and lights, were mentioned.
Carlsbad Workshop	Identified obstacles included costs related to energy usage and equipment such as air conditioners and heaters, limited awareness of CEA and government programs, older homes not suited to electrification, and the need for insulation and battery upgrades. The suggestion to permit portable solar panels was made. English-speaking participants expressed interest in electric vehicles, solar chargers, foam insulation, and energy-efficient appliances, though uncertainty existed around contacting professionals concerning batteries. To mitigate expenses, some avoid running air conditioning.
Online Workshops — English & Spanish	A lack of information regarding CEA and its programs emerged as a predominant barrier. In the Spanish session, summer cooling costs and trust in organizations were additional challenges, alongside support requirements for completing applications.
Vista Workshop	Participants highlighted difficulties related to landlord-controlled outdated equipment, complex integrated systems, paperwork challenges for homeowners, architectural limitations, and user-

	unfriendly automatic controls. One participant reported inadequate follow-up on program outreach. Institutional energy limits also restrict business capabilities, as noted by a local nursery owner. Recommendations included introducing resource programs for home upgrades and establishing a community office to provide guidance.
Oceanside Workshop	Energy costs were a common challenge, with reports of overcharging for gas and electricity and experiences of excessive payments despite having solar panels. Community members expressed interest in reducing their carbon footprint, efficiently checking appliances to save energy without additional costs, and receiving more information about CEA programs. Some groups stated reluctance to rely on SDGE for price reductions.
Solana Beach Workshop	Challenges included navigating landlord relationships as renters, difficulties in accessing upgrades due to various management layers, and lack of notification or involvement in upgrade planning. Questions concerning the benefits of renewables were raised. Older homes present ongoing challenges; residents frequently cite inability to upgrade to energy-efficient appliances. Insufficient information about battery chargers was identified, as was the need for better communication at point of sale for electric vehicles. Panel upgrades required for advanced chargers were described as an additional barrier. Participants also indicated skepticism about the effectiveness of equipment changes, noting a demand for consistent performance evidence.

Summary of Energy-Related Issues and Barriers
Across workshops, participants cited high energy costs, outdated and landlord-controlled appliances, and financial constraints as major barriers to improving energy usage. Many renters felt limited by their tenancy status, while others noted a lack of information, difficulty qualifying for assistance programs, and challenges with technology or program enrollment. Additional obstacles included expensive upgrade requirements (such as for solar panels), architectural limitations, skepticism about the benefits of new equipment, and a need for better communication and support regarding energy programs and technologies.

Section 3. Understanding Energy Usage and Decision-Making

Workshop participants were provided with the following explanation and questions to understand the way people make decisions about energy and the tools they have and use that motivate them. This discussion helps to understand how familiar individuals are with their bills and whether they are tracking their energy use.

The way people make decisions about energy can depend on what we know, what tools we have and what motivates us. With this set of questions, we want to understand how familiar you are with tracking your energy use and what motivates you to make changes.

a) *Do you know how to track your energy use?*
b) *If you do know how to track your energy, what methods do you use to track it? For example, checking your monthly paper or online bill, reading your meter, using smart apps or monitoring specific appliances.*
c) *What motivates you to reduce energy use or invest in clean energy solutions? For example, saving money, helping the environment, improving comfort at home or increasing property value.*

Response Summary for Section 3: Energy Usage and Decision-Making
Few individuals are familiar with the details of their energy bills, and even fewer actively monitor their energy consumption.

Table 4: Energy Usage and Decision-Making	
Escondido Workshop	Most discussion groups acknowledged a lack of awareness regarding peak hours, and many reported not knowing how to track their energy use. One participant remarked that their busy lives make it difficult to review bills, resulting in limited understanding of the relationship between usage and cost. Some participants expressed interest in learning how to read their bill, reduce costs, and explore options such as hybrid vehicles. In some instances, payment responsibilities fall to other family members. Suggestions to improve access included the development of an efficient and user-friendly app for tracking billing and energy information, as well as providing a dedicated phone line for assistance. Key motivators included low costs, environmental concerns, community considerations, and interest in electric vehicles. Awareness of programs like CARE/FERA was noted in some groups, while others were unaware of the broader impacts of energy use.
San Marcos Workshop	Half of the discussion groups tracked their energy use via their energy bill, with others using online reviews, brief bill checks, or identifying no alternate means. Three groups were unfamiliar with methods for monitoring consumption and did not understand the connection between meter readings, bills, and cost. A subset reported practicing energy-saving behaviors during peak hours, turning off appliances, air-drying laundry, minimizing lighting use, or utilizing laundromats. There was a perception among some that businesses benefit from lower rates than residents. Cost savings were identified as the primary motivation, with some groups requesting additional

	information about the environmental impacts of energy use. Barriers to upgrades included confusing information and apprehension about ineffective investments. Information needs centered on saving energy, reading bills, and leveraging technology.
Carlsbad Workshop	In one group, only one of four participants understood how to track energy use. Recommendations included funding community organizations to provide education about available programs. Other methods used for tracking included spreadsheets, bill reviews, and solar apps. Environmental protection was cited as the top motivation for reducing energy consumption, alongside increasing property values.
Online Workshops - English	Participants requested more information about SDG&E's roles, products, discounts such as CARE/FARE, differences in energy offerings, and training on bill structure to promote behavior change. Family-centered education was suggested to support engagement where men often manage household bills.
Online Workshop - Spanish	Attendees generally indicated they were only able to track energy use via their utility bill.
Vista Workshop	Most participants tracked their energy consumption through either paper or online billing statements. Additional tracking tools included applications, websites, and using sleep timers on electronics. Motivations for reducing energy use included decreasing costs, supporting a better future and environment, reducing public safety power shutoffs, and preventing wildfires.
Oceanside Workshop	Some groups lacked knowledge on how to track energy usage or their participation status with CEA. Time constraints were cited as a barrier to reviewing bills. However, in one group, all five participants used their SDGE statement (online or paper) to monitor consumption. Motivation included environmental benefits and cost reduction. Participants desired resources on reading bills, receiving information via text, and learning to read meters. An app was recommended for sharing relevant information.
Solana Beach Workshop	This group was largely knowledgeable about tracking energy use. Reliability and outage concerns motivated some to invest in solar panels. Participants cited cost, affordability, and environmental stewardship as driving factors for adopting clean energy solutions. Interest was also expressed in home upgrades, supported by financing options such as GoGreen Financing, which participants found effective in improving efficiency.

Summary of Energy Usage and Decision-Making
Most workshop participants demonstrated limited familiarity with their energy bills, and few actively tracked their energy usage. Tracking methods varied, with some using paper or online billing statements, apps, or spreadsheets, while others lacked awareness of how to monitor consumption. Key motivations for reducing energy use included saving money, environmental protection, and increasing comfort or property value. Barriers to effective decision-making involved confusing information, time constraints, and skepticism about the benefits of energy upgrades. Participants expressed a desire for improved resources, such as user-friendly apps and educational support, to help them better understand and manage their energy consumption.

Section 4. Exploring Past and Future Energy Improvements

Workshop participants were provided with the following explanation and questions to understand what type of energy-related projects individuals have prioritized or are considering for the future. This can help CEA determine program prioritization.

Understanding what type of energy-related projects you have prioritized or are considering for the future can help CEA determine program prioritization. These questions will help us learn what improvements you've made and what resources would be helpful for projects you're considering.

a) *Have you made any energy-related upgrades to your home or business (e.g., LED lighting, insulation, solar panels)?*
b) *If you are considering improvements for the future, what support or resources would help you take the next step?*

Response Summary for Section 4: Past and Future Energy Improvements
Workshop participants consistently prioritized energy-focused initiatives, including upgrading to LED lighting, installing solar panels, and improving insulation.

Table 5: Past & Future Energy Improvements	
Escondido Workshop	Participants noted successful upgrades such as LED lights and solar-powered lightbulbs. Mobile homeowners expressed interest in solar panels with battery systems, and other community members shared ongoing installation efforts. Recommended programs included workshops led by staff to address individual needs, informational text messages, renter-friendly initiatives, electronic recycling programs, and events like a "feria de focos" (light show) offering discounted

	LEDs. One discussion group suggested diverse renewable energy program options, self-installation assistance for solar panels to mitigate challenges associated with contractors, increased tax credits, financial support for repairs and home insulation, and reduced rates for low-income households. Additional delivery recommendations encompassed support with application paperwork, multilingual accessibility (English, Spanish, French), and expanded electricity-related programming. Other groups advocated for discount programs, targeted support for low-income families, and various incentives. Concerns were raised about limited information within the Latino community for accessing benefits, as well as the desire for lower energy bills and more affordable electric vehicles.
San Marcos Workshop	Community members shared energy-saving practices such as reducing television use, air drying laundry, installing LED lighting, utilizing solar panels, switching off unused lights, using fans instead of air conditioning, upgrading windows, and replacing gas stoves with induction models. Desired upgrades included appliances that consume less energy and water. Requested programs focused on window replacement assistance, cost-reducing options, alternatives to solar power, free solar panel offerings, battery purchase support, solar panel cost transparency, energy audits, individualized contract support, and educational workshops. Participants also sought information regarding energy-efficient appliances, weatherization, home insulation, and programs benefiting families with multiple children. Preferred modes of engagement included interactive presentations, door-to-door outreach, and personal explanations due to difficulties with social media platforms. Skepticism about the actual impact of solar panels on energy savings was noted, alongside barriers such as installation costs and qualifications for CARE programs. There were suggestions to develop neighborhood-specific plans, and recognition that all energy-related changes present both advantages and disadvantages.
Carlsbad Workshop	Groups reported completing LED light replacements and discussed cost barriers requiring financial support, with some awaiting price reductions before making additional purchases. The workshop proved beneficial in facilitating knowledge sharing among participants with relevant experience. Battery replacement costs remain high, prompting requests for further information on solar technology and battery systems.
Online Workshops – English	Discussions highlighted obstacles accessing public charging stations, concerns about solar panels installed in apartments without tenant input or battery integration, and a lack of renter education regarding these impacts. Participants emphasized the need for comprehensive

	information on energy conservation strategies, including electronics and lighting choices, while noting infrastructure challenges such as outdated wiring and inefficient appliances that complicate efforts to reduce peak energy usage.
Online Workshop – Spanish	Participants expressed a strong interest in enhancing energy efficiency through solar panel installations and charging stations, with requests focused on financial incentives and support for implementation.
Vista Workshop	Community members reported upgrades including LED lighting, insulation improvements, solar panel installations, electric water heaters, and heat pumps. Additional strategies mentioned involved using candles and checking appliances prior to bedtime. Programmatic requests featured free mobile solar panels for renters, school-based energy education presentations, improved rebate availability, cost reduction measures, and regulatory mandates for new construction.
Oceanside Workshop	Attendees described implementing solar panels, batteries, insulation, mini splits, heat pumps, furnaces, water heaters, and window replacements. Energy-saving behaviors included unplugging electronics when not in use. Requested programs focused on affordable and free solar panel solutions, appliance and light bulb replacements, electric vehicle charging stations, educational workshops on insulation, and support for home weatherization. Participants also identified the need for clearer guidance on renting versus owning in relation to utility discounts, and funding for mobile home upgrades and modernized kitchen appliances.
Solana Beach Workshop	Discussion groups stressed the importance of renter-specific workshops and landlord engagement to facilitate energy-efficient upgrades. Concerns centered on reduced affordable housing following property improvements, reinforcing renters as an underserved priority group. Participants highlighted limitations faced by landlords, the critical role of business owners and property managers, and the burden placed on managers who may lack adequate education and resources.

Summary of Past and Future Energy Improvements

Across workshops, participants prioritized energy-saving upgrades such as LED lighting, solar panels, and improved insulation. Community members expressed interest in additional measures like battery storage, electric appliances, and weatherization, but noted barriers including high upfront costs, information gaps, and limited access—especially for renters and low-income households. Desired support included financial incentives, multilingual resources, renter-friendly programs, hands-on workshops, and personalized guidance to make upgrades more attainable and effective for diverse community needs.

Section 5. Gauging Awareness of CEA Programs

Workshop participants were provided with the following explanation and questions to understand customer familiarity with programs that help save money, reduce energy and adopt cleaner energy.

CEA offers energy programs designed to help customers save money, reduce energy use and adopt cleaner energy. We want to understand your familiarity with these programs and what programs interest you most.

- *Are you aware of any energy programs or services offered by CEA?*
- *Which types of programs or incentives would you be most interested in learning more about? For example, reduced rates, energy use tracking, solar panels and battery storage, rebates and incentives.*

Response Summary for Section 5: Awareness of CEA Programs

Workshop participants reported limited or no awareness of CEA prior to attending the presentation. Individuals are not familiar with programs to help them reduce energy use. Everyone requested information about CEA and information regarding programs that can help consumers reduce usage and access incentives.

Table 6: Awareness of CEA Programs	
Escondido Workshop	A discussion group expressed interest in cash incentives but raised concerns regarding whether such incentives would be directed to help homeowners rather than renters. Participants noted that customers typically pay attention to their bills primarily in terms of total cost, rather than monitoring actual energy usage. In three out of five groups, attendees reported that the workshop in Escondido was their first exposure to CEA and its programs. One group indicated particular interest in learning about solar panels and clean energy. Another group requested a program providing guidance on selecting appliances—including TVs, computers, washers, and microwaves—as well as general support for energy conservation initiatives. An additional group asked for information addressing the impacts and benefits of energy use. Further requests included a workshop or presentation on bill interpretation, an explanation of the advantages of being a CEA client, education on the distinction between clean and non-clean energy, advice on energy savings, and clarification on energy distribution processes.

	Additional feedback took the form of questions, such as: Do lamp lights contribute significantly to energy costs? What responsibilities does the community bear in terms of energy consumption? At what times do we use energy most frequently? Is there access to reliable renewable energy programs? Other inquiries included: What is the impact if widespread adoption of clean energy or solar panels reduces electric company revenue? How does city lighting affect local economic outcomes? What constitutes clean energy?
San Marcos Workshop	Participants in San Marcos provided the following information regarding awareness of programs. There is general awareness of CARE; however, some individuals are not familiar with CEA programs. One participant expressed regret over lacking information about CEA prior to their decision not to continue with the program, citing a lack of previous awareness. There is notable enthusiasm regarding sustainability initiatives and cost savings. Community members have expressed interest in educational opportunities such as understanding how to read energy bills, measure energy usage, and access available rebates and incentives. Reduced utility rates and increased transparency about CEA through community meetings are also valued, with one group showing specific interest in peak smart programs. Other highlighted interests include participation in free LED lighting distribution, gaining information on the health impacts of pollution, solar panel programs, home upgrades involving weatherization and electrification, battery storage, and access to complimentary batteries. Furthermore, there is a strong preference among community members for receiving information in Spanish and for opportunities to learn more about CEA programs. Questions: ● Is CEA a government agency? ● What impact does energy use and consumption have on environmental pollution? ● How is clean energy defined? ● Does SDGE distribute non-renewable energy, and what distinguishes CEA from SDGE? ● Does CEA provide programs for individuals with low income? ● Are there additional resources offered by CEA to help reduce energy bills?

	● Where can I find more information about strategies to lower energy costs? ● How can I verify my enrollment with CEA? ● Will there be future community meetings to learn more about CEA? ● What are the advantages and potential drawbacks of installing solar panels, especially regarding cost savings? There are concerns that installation may lead to higher expenses. ● What would be my current payments if I install solar panels? ● How can I determine whether the energy I receive is clean? ● When will responses to these questions be provided? ● Is it possible to switch energy providers? ● Can you clarify what is meant by clean energy? ● Could you explain the percentages referenced in the presentation regarding the energy mix? ● What are the specific benefits of CEA? ● How many customers both receive and fully understand their energy bills? ● In what ways do solar panels benefit residents of apartment buildings? ● From where is safe energy sourced? ● Does electricity generation or distribution produce radiation? ● Do energy prices vary depending on usage levels?
Carlsbad Workshop	In one discussion group, most participants were aware of CEA's programs. In another group, half of the members indicated familiarity with these programs, while one individual stated they did not meet the eligibility requirements. Feedback from participants highlighted insufficient advertising related to CEA initiatives. The English-language group expressed a preference for email as their primary mode of communication and suggested collaborating with stakeholders to advocate for supportive legislation. Additionally, concerns were raised regarding profit distribution to businesses and perceptions of excessive charges. Question: What is the cost of solar panels?
Online Workshops - English	The group emphasized the necessity of enhancing education and dissemination of information regarding available programs. There was an inquiry as to whether participation in these programs would be considered a "public charge" for immigrants. An attendee also

	requested additional data on usage for comparison purposes, details about peak operating hours, and asked whether implementing informational campaigns—such as distributing magnets with peak hour details—would be beneficial. Additional questions raised included: a) whether participation in these programs requires disclosure of immigration status; b) if involvement in CEA programs would be classified as a public charge (see: https://www.ilrc.org/public-charge); and c) the need for informational guidance on demand response programs to be provided as handouts. CEA committed to following up with UP regarding concerns around program accessibility and potential perception as a "public charge."
Online Workshop - Spanish	Participants expressed interest in informational programs provided by CEA and educational workshops designed to involve children. Additionally, a discussion group member highlighted an application accessible to select customers.
Vista Workshop	One discussion group indicated a general awareness of the programs offered by CEA, while another expressed limited knowledge regarding these initiatives. Recommendations from community members include enhancing outreach efforts, providing clear information about existing CEA programs and their operations, and featuring testimonials from individuals who have benefited from these programs through online platforms or news outlets. Additionally, it was noted that not all community members utilize social media, and CEA should consider alternative communication channels. A request was also made for a pamphlet detailing the available CEA programs.
Oceanside Workshop	During one discussion group, two participants indicated familiarity with CEA's programs, while three reported they were unaware of them. One group mentioned knowledge of medical care electrical services as well as low-income gas and electric service options. Participants expressed interest in receiving incentives related to gas and electricity, noted discouragement from not receiving support through 211, and requested information regarding qualification for low-income programs. Additional requests included more workshops, guidance on energy conservation for older homes, discounts on electricity, further incentives, assistance with electricity and water bill payments, and reference to the EBD (Equitable Decarbonization Program). The group also raised questions such as how individuals can determine their inclusion in CEA and CEA's perspective on nuclear

	energy. There was a desire for increased promotion of CEA, additional workshops, expanded information about programs, presentations on cost-saving strategies, and sessions on understanding utility bills and energy meters.
Solana Beach Workshop	Several participants were unaware of Peak Smart, opt-out options, and expressed uncertainty regarding available programs for renters. Some participants were familiar with tracking their bill via the SDG&E app and knew about relevant programs; however, they were not eligible to participate. Additionally, some participants did not know that the website featured a comparison tool.

Summary Regarding Awareness of CEA Programs

Overall, workshop participants demonstrated limited awareness of CEA and its energy-saving programs prior to attending. Most individuals requested more information about CEA offerings, especially regarding how to reduce energy usage and access available incentives. Interest was expressed in educational opportunities—such as understanding energy bills, learning about rebates, and exploring clean energy options—while questions and feedback highlighted the need for clearer communication, more outreach, and resources tailored to renters and low-income households. Some participants were familiar with related services, but many were not eligible or lacked information about specific tools and program distinctions.

CLEAN ENERGY ALLIANCE

Staff Report

DATE: March 26, 2026

TO: Clean Energy Alliance Board of Directors

FROM: Greg Wade, Chief Executive Officer

ITEM 7: Public Hearing to Consider Adoption of Resolution No. 2026-018 Expanding the Super Off-Peak Time-of-Use Period, Establishing a Medium Commercial Class and Large Commercial & Industrial Class and Rate Schedules

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RECOMMENDATION:

That the Clean Energy Alliance Board of Directors (Board):

1. Conduct this Public Hearing: Open the Public Hearing, Receive Public Testimony, and Close the Public Hearing;
2. Adopt Resolution No. 2026-018 Expanding the Super Off-Peak Time-of-Use Period; and Establishing a Medium Commercial and Large Commercial & Industrial Customer Class and Rate Schedules

BACKGROUND AND DISCUSSION:

Generally, every four years, the investor-owned utilities (IOU) enter into a formal process with the California Public Utilities Commission (CPUC) known as a General Rate Case (GRC), where the IOU requests approval to update the rates it charges customers to recover the cost of providing service. Phase 1 of a GRC determines the total amount of revenue the utility is authorized to collect from customers, while Phase 2 determines the methods by which the revenue is to be collected through rate or rate class restructuring. On January 17, 2023, San Diego Gas & Electric (SDG&E) filed their GRC Phase 2 application (A.23-01-008), in which the CPUC responded with Proposed Decision (PD) A.23-01-008 on August 13th, 2025.

As a result of the PD which finalized rate design changes in the SDG&E 2024 GRC Phase 2, SDG&E filed Advice Letter 4791-E (AL 4791-E) on March 2nd, 2026 which would implement an expansion to the Super Off-Peak (SOP) period and the establishment of a new Medium Commercial customer class effective April 1, 2026. Clean Energy Alliance (CEA) is proposing to mirror the SDG&E SOP time-of-use (TOU) period and Medium Commercial customer class criteria to maintain alignment between generation rate structures and ensure consistent customer price signals.

Super Off-Peak Expansion

To maintain consistency between generation, transmission and delivery rates with SDG&E for unbundled customers, CEA's Super Off-Peak TOU period would expand to include SOP from 10 a.m. to 2 p.m. year-round for all applicable TOU schedules, replacing the prior SOP periods which only occurred from 10 a.m.

to 2 p.m. March-April. This change would result in a net benefit to customers using electricity during this time, as the SOP period has the lowest rates compared to Off-Peak and On-Peak periods.

Furthermore, the expansion of the SOP period from 10 a.m. to 2 p.m. year-round is consistent with hours at which more renewable energy is generated (i.e. solar). This change provides opportunity for customers to shift their usage into lower-cost TOU periods in the middle of the day when CEA's service territory traditionally has excess solar generation. This change does not impact Grandfathered TOU periods and non-TOU rates.

Table 1: Updated Time-of-Use Periods

TOU Period	Weekdays		Weekends and Holidays	
	Summer	Winter	Summer	Winter
On-Peak	4 PM – 9 PM	4 PM – 9 PM	4 PM – 9 PM	4 PM – 9 PM
Off-Peak	All other hours	All other hours	All other hours	All other hours
Super Off-Peak	Midnight-6AM; 10 AM – 2 PM	Midnight-6AM; 10 AM – 2 PM	Midnight – 2 PM	Midnight – 2 PM

<u>Medium Commercial/Large Commercial & Industrial Customer Class</u>

Currently, commercial customers within SDG&E territory are assigned to either a Small Commercial customer class for customers with a demand of 20 kW or less, or Medium/Large Commercial & Industrial customer class for customers with equal to or greater than 20 kW of demand based on three months of usage. To achieve rate structure alignment for unbundled customers, CEA similarly assigns customers to only Small or Medium/Large Commercial & Industrial customer classes based on these same criteria. As part of SDG&E's GRC Phase 2 and AL-4791-E, a new Medium Commercial customer class has been created for customers with demand equal to or greater than 20 kW and less than 200 kW effective April 1, 2026. CEA is proposing to mirror the creation of a Medium Commercial and Large Commercial & Industrial customer class, which requires the establishment of new rate schedules and associated rates.

Beginning April 1, 2026, CEA is proposing the current Medium/Large Commercial & Industrial customer class be divided into the following separate customer classes based on electricity demand:

- **Medium Commercial**: 20kW to less than 200kW demand
- **Large Commercial & Industrial:** 200kW or higher demand

As a result of these changes to the customer class criteria, the following rate schedules have been created to accurately capture the Medium Commercial and Large Commercial & Industrial for billing purposes:

Table 2: Proposed Medium Commercial and Large Commercial & Industrial Rate Classes

Previous CEA Rate	New CEA Medium Commercial Rate	New CEA Large Commercial & Industrial Rate
AL-TOU-S AL-TOU-P AL-TOU-T	AL-TOU-M-S AL-TOU-M-P AL-TOU-M-T	AL-TOU-L-S AL-TOU-L-P AL-TOU-L-T
DG-R-S DG-R-P DG-R-T	DG-R-M-S DG-R-M-P DG-R-M-T	DG-R-L-S DG-R-L-P DG-R-L-T
G-AL-TOU-S G-AL-TOU-P G-AL-TOU-T	G-AL-TOU-M-S G-AL-TOU-M-P G-AL-TOU-M-T	G-AL-TOU-L-S G-AL-TOU-L-P G-AL-TOU-L-T
G-DG-R-S G-DG-R-P G-DG-R-T	G-DG-R-M-S G-DG-R-M-P G-DG-R-M-T	G-DG-R-L-S G-DG-R-L-P G-DG-R-L-T

By establishing the Medium Commercial customer class, unbundled customers which are served by CEA will be similarly categorized in generation, transmission and delivery charges which results in ease of billing and customer experience.

Other Changes

In addition to adjusting the SOP period and establishment of a Medium Commercial class, SDG&E has proposed the following rate changes:

- Expand low-income discount for commercial CARE customers from 20% to 35%
- Increase of the Commercial Monthly Service Fees by 5-15% across customer classes
- Expand Medical Baseline discount to be available for all untiered rate schedules
- Updates to the Power Charge Indifference Adjustment (PCIA) for all vintages in CEA territory

In response to significant increases in PCIA rates, the CEA Board approved a Rate Relief Credit for Clean Impact customers at the January 29, 2026 meeting. Now, SDG&E has proposed a variety of additional adjustments to the PCIA for most customer classes in CEA's service territory. Generally, the proposed PCIA rates result in a decrease except for Medium/Large Commercial customers in most of CEA's service territory. Medium/Large Commercial customers account for approximately 1% of all CEA customers and 12% of all Commercial customers. Staff is reviewing the proposed PCIA rates and will return at a later date with an overview of the impact of these PCIA changes as on the adopted Rate Relief Credit.

The following represents the PCIA changes resulting from SDG&E's rate changes:

Customer Class	Carlsbad, Del Mar, Solana Beach, Oceanside, Vista & SDGE	Escondido, San Marcos
Residential	0%	-16%
Small Commercial	-33%	-46%
Medium/Large Commercial	11%	-17%
Agriculture	-8%	-21%
Lighting	0%	-20%

Table 1: Proposed percent change in PCIA vintage compared to rates effective January 1, 2025.

FISCAL IMPACT:

There is an estimated fiscal impact of $6.4 million in decreased revenue as a result of the expansion of the Super Off-Peak time-of-use period. Staff is actively reviewing current rates to determine if revenue could be recouped and will return at a later time for consideration of revised rates. There is no fiscal impact from the creation of a Medium Commercial and Large Commercial & Industrial customer class, as the rates remain the same regardless of whether a customer is assigned to a new customer class.

Submitted for Board consideration:

____

ATTACHMENTS:

A. Resolution No. 2026-018 Expanding the Super Off-Peak Time-of-Use Period, Establishing a Medium Commercial Class and Large Commercial & Industrial Class and Rate Schedules
B. Public Hearing Notice - Medium Commercial Class Split and Time-of-Use Update

CLEAN ENERGY ALLIANCE
RESOLUTION NO. 2026-018

A RESOLUTION OF THE BOARD OF DIRECTORS OF CLEAN ENERGY ALLIANCE AMENDING THE TIME-OF-USE SCHEDULE AND CREATION OF A MEDIUM AND LARGE COMMERCIAL/INDUSTRIAL CUSTOMER CLASS

WHEREAS, Clean Energy Alliance (CEA) is a joint powers authority established on November 4, 2019, and organized under the Joint Exercise of Powers Act (Government Code Sections 6500 *et seq*.); and

WHEREAS, section 4.6 of the Joint Powers Authority (JPA) Agreement establishes the specific responsibility of the CEA Board of Directors to adopt retail rates for power; and

WHEREAS, the current CEA rates and time-of-use schedule were established through the adoption of Resolution 2024-009 effective November 1, 2024; and

WHEREAS, the Public Hearing Notice was published in the San Diego Union Tribune on March 13 and March 20, 2026.

NOW, THEREFORE, BE IT RESOLVED, by the Board of Directors of CEA, as follows:

Section 1. The Board of Directors of CEA hereby adopts and approves the following time-of-use schedule for applicable rates:

TOU Period	**Weekdays**		**Weekends and Holidays**	
	Summer	**Winter**	**Summer**	**Winter**
On-Peak	4 PM – 9 PM	4 PM – 9 PM	4 PM – 9 PM	4 PM – 9 PM
Off-Peak	All other hours	All other hours	All other hours	All other hours
Super Off-Peak	Midnight-6AM; 10 AM – 2 PM	Midnight-6AM; 10 AM – 2 PM	Midnight – 2 PM	Midnight – 2 PM

Section 2. The Board of Directors of the Clean Energy Alliance hereby approves CEA Rates as detailed in Exhibit A.

Section 3. Time-of-use schedule and rates are to be effective April 1, 2026.

The foregoing Resolution was passed and adopted this 26th day of March, 2026, by the following vote:

AYES:
NOES:
ABSENT:
ABSTAIN:

APPROVED:

____
Katie Melendez, Board Chair

ATTEST:

____
Ana Marie Alarcon, Clerk to the Board

Clean Energy Alliance
Proposed Amended Medium Commercial and Large Commercial/Industrial Rate Schedule
Effective April 1, 2026

PREVIOUS CEA RATE	PROPOSED CEA RATE	TIME-OF-USE PERIOD	SUMMER RATE June 1 – October 31 Per kWh	WINTER November 1 – May 31 Per kWh
AL-TOU-S	AL-TOU-M-S	On-Peak	$0.23857	$0.32005
AL-TOU-S	AL-TOU-M-S	Off-Peak	$0.12496	$0.14575
AL-TOU-S	AL-TOU-M-S	Super Off-Peak	$0.08823	$0.09516
AL-TOU-S DEMAND	AL-TOU-M-S	On-Peak	$21.15	$0.00
AL-TOU-P	AL-TOU-M-P	On-Peak	$0.23712	$0.31823
AL-TOU-P	AL-TOU-M-P	Off-Peak	$0.12411	$0.14483
AL-TOU-P	AL-TOU-M-P	Super Off-Peak	$0.08773	$0.09458
AL-TOU-P DEMAND	AL-TOU-M-P	On-Peak	$21.05	$0.00
AL-TOU-T	AL-TOU-M-T	On-Peak	$0.22433	$0.30159
AL-TOU-T	AL-TOU-M-T	Off-Peak	$0.11625	$0.13572
AL-TOU-T	AL-TOU-M-T	Super Off-Peak	$0.08175	$0.08768
AL-TOU-T DEMAND	AL-TOU-M-T	On-Peak	$20.15	$0.00
DG-R-S	DG-R-M-S	On-Peak	$0.64265	$0.22847
DG-R-S	DG-R-M-S	Off-Peak	$0.19149	$0.09439
DG-R-S	DG-R-M-S	Super Off-Peak	$0.05400	$0.05548
DG-R-P	DG-R-M-P	On-Peak	$0.63943	$0.22707
DG-R-P	DG-R-M-P	Off-Peak	$0.19037	$0.09369
DG-R-P	DG-R-M-P	Super Off-Peak	$0.05361	$0.05505
DG-R-T	DG-R-M-T	On-Peak	$ 0.61094	$ 0.21426
DG-R-T	DG-R-M-T	Off-Peak	$ 0.18011	$ 0.08669
DG-R-T	DG-R-M-T	Super Off-Peak	$ 0.04902	$ 0.04973
G-AL-TOU-S (Grandfathered)	G-AL-TOU-M-S	On-Peak	$0.11502	$0.52171
G-AL-TOU-S (Grandfathered)	G-AL-TOU-M-S	Semi-Peak	$0.11303	$0.20377
G-AL-TOU-S (Grandfathered)	G-AL-TOU-M-S	Off-Peak	$0.09115	$0.20373
G-AL-TOU-S DEMAND (Grandfathered)	G-AL-TOU-M-S	On-Peak	$3.78	$0.00
G-AL-TOU-P (Grandfathered)	G-AL-TOU-M-P	On-Peak	$0.11410	$0.51883
G-AL-TOU-P (Grandfathered)	G-AL-TOU-M-P	Semi-Peak	$0.11212	$0.20254
G-AL-TOU-P (Grandfathered)	G-AL-TOU-M-P	Off-Peak	$0.09034	$0.20248
G-AL-TOU-P DEMAND (Grandfathered)	G-AL-TOU-M-P	On-Peak	$3.76	$0.00
G-AL-TOU-T (Grandfathered)	G-AL-TOU-M-T	On-Peak	$0.10637	$0.49329
G-AL-TOU-T (Grandfathered)	G-AL-TOU-M-T	Semi-Peak	$0.10452	$0.19090
G-AL-TOU-T (Grandfathered)	G-AL-TOU-M-T	Off-Peak	$0.08366	$0.19086
G-AL-TOU-T DEMAND (Grandfathered)	G-AL-TOU-M-T	On-Peak	$3.60	$0.00

PREVIOUS CEA RATE	PROPOSED CEA RATE	TIME-OF-USE PERIOD	SUMMER RATE June 1 – October 31 Per kWh	WINTER November 1 – May 31 Per kWh
G-DG-R-S (Grandfathered)	G-DG-R-M-S	On-Peak	$0.18994	$0.46444
G-DG-R-S (Grandfathered)	G-DG-R-M-S	Semi-Peak	$0.15667	$0.17693
G-DG-R-S (Grandfathered)	G-DG-R-M-S	Off-Peak	$0.12327	$0.17688
G-DG-R-P (Grandfathered)	G-DG-R-M-P	On-Peak	$ 0.18885	$0.46182
G-DG-R-P (Grandfathered)	G-DG-R-M-P	Semi-Peak	$0.15561	$0.17581
G-DG-R-P (Grandfathered)	G-DG-R-M-P	Off-Peak	$0.12231	$0.17576
G-DG-R-T (Grandfathered)	G-DG-R-M-T	On-Peak	$0.17971	$0.43873
G-DG-R-T (Grandfathered)	G-DG-R-M-T	Semi-Peak	$0.14658	$0.1653
G-DG-R-T (Grandfathered)	G-DG-R-M-T	Off-Peak	$0.11419	$0.16524
AL-TOU-S	AL-TOU-L-S	On-Peak	$0.23857	$0.32005
AL-TOU-S	AL-TOU-L-S	Off-Peak	$0.12496	$0.14575
AL-TOU-S	AL-TOU-L-S	Super Off-Peak	$0.08823	$0.09516
AL-TOU-S DEMAND	AL-TOU-L-S	On-Peak	$21.15	$0.00
AL-TOU-P	AL-TOU-L-P	On-Peak	$0.23712	$0.31823
AL-TOU-P	AL-TOU-L-P	Off-Peak	$0.12411	$0.14483
AL-TOU-P	AL-TOU-L-P	Super Off-Peak	$0.08773	$0.09458
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G-AL-TOU-S (Grandfathered)	G-AL-TOU-L-S	Off-Peak	$0.09115	$0.20373
G-AL-TOU-S DEMAND (Grandfathered)	G-AL-TOU-L-S	On-Peak	$3.78	$0.00
G-AL-TOU-P (Grandfathered)	G-AL-TOU-L-P	On-Peak	$0.11410	$0.51883
G-AL-TOU-P (Grandfathered)	G-AL-TOU-L-P	Semi-Peak	$0.11212	$0.20254
G-AL-TOU-P (Grandfathered)	G-AL-TOU-L-P	Off-Peak	$0.09034	$0.20248
G-AL-TOU-P DEMAND (Grandfathered)	G-AL-TOU-L-P	On-Peak	$3.76	$0.00

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G-AL-TOU-T (Grandfathered)	G-AL-TOU-L-T	Semi-Peak	$0.10452	$0.19090
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G-DG-R-S (Grandfathered)	G-DG-R-L-S	Off-Peak	$0.12327	$0.17688
G-DG-R-P (Grandfathered)	G-DG-R-L-P	On-Peak	$ 0.18885	$0.46182
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G-DG-R-P (Grandfathered)	G-DG-R-L-P	Off-Peak	$0.12231	$0.17576
G-DG-R-T (Grandfathered)	G-DG-R-L-T	On-Peak	$0.17971	$0.43873
G-DG-R-T (Grandfathered)	G-DG-R-L-T	Semi-Peak	$0.14658	$0.16530
G-DG-R-T (Grandfathered)	G-DG-R-L-T	Off-Peak	$0.11419	$0.16524

PUBLIC HEARING NOTICE
CLEAN ENERGY ALLIANCE

The Board of Directors of Clean Energy Alliance (CEA) will conduct a public hearing to consider adopting a resolution which would expand the weekday Super Off-Peak period to include 10 a.m. to 2 p.m. year-round for all applicable time-of-use (TOU) schedules/programs and establish rates for new Medium and Large Commercial rate schedules, effective April 1, 2026. The exact proposed rate schedules and associated rates are available on Clean Energy Alliance's website at TheCleanEnergyAlliance.org/Billing-Rates

Updated Time-of-Use Periods

TOU Period	**Weekdays**		**Weekends and Holidays**	
	Summer	**Winter**	**Summer**	**Winter**
On-Peak	4 PM – 9 PM	4 PM – 9 PM	4 PM – 9 PM	4 PM – 9 PM
Off-Peak	All other hours	All other hours	All other hours	All other hours
Super Off-Peak	Midnight-6AM; 10 AM – 2 PM	Midnight-6AM; 10 AM – 2 PM	Midnight – 2 PM	Midnight – 2 PM

DATE OF HEARING:	Thursday, March 26, 2026
TIME OF HEARING:	2:00 p.m. or as soon thereafter as the matter may be heard
PLACE OF HEARING:	Leucadia Wastewater District, Boardroom 1960 La Costa Avenue Carlsbad, CA 92009

All interested persons are invited to attend the meeting and comment on adopting a Resolution Amending Rates for Clean Energy Alliance. Members of the public unable to attend the public hearing may submit their comments and recommendations in writing to Clean Energy Alliance, via email to clerk@thecleanenergyalliance.org, which must be received no later than 12:00pm on Thursday, March 26, 2026 to ensure consideration by the Board.

DATED: March 10, 2026

Ana Marie Alarcon, CMC
Clerk to the Board

Published:	Friday March 13, 2026 Friday March 20, 2026	Published: San Diego Union Tribune
Posted:	Friday March 13, 2026	Leucadia Wastewater District, Boardroom

CLEAN ENERGY ALLIANCE

Staff Report

DATE: March 26, 2026

TO: Clean Energy Alliance Board of Directors

FROM: Gregory Wade, Chief Executive Officer

ITEM 8: Receive Regulatory Update from Keyes & Fox

RECOMMENDATION:

Receive the Regulatory Update from Keyes & Fox.

BACKGROUND AND DISCUSSION:

Clean Energy Alliance (CEA) contracts with Keyes & Fox for Regulatory Advocacy related activities. Each month Keyes & Fox provides an update to the CEA Board on key items of interest. This month's update will focus on Energy Division's recently issued report on Resource Adequacy ("RA") transactability, as well as the Power Charge Indifference Adjustment ("PCIA") rulemaking testimony and proposals related to banked renewable energy credits.

FISCAL IMPACT:

There is no fiscal impact from this action.

Submitted for Board consideration:

____
Gregory Wade
Chief Executive Officer

ATTACHMENTS:

A. Keyes & Fox Regulatory Report

KEYES&FOX LLP

EQ Research

Clean Energy Alliance

Regulatory Monitoring Report

To:	Clean Energy Alliance (CEA) Board of Directors
From:	Tim Lindl, Partner, Keyes & Fox LLP Jacob Schlesinger, Partner, Keyes & Fox LLP Jason Hoyle, Director of Research, EQ Research LLC
Subject:	Monthly Regulatory Memo
Date:	March 16, 2026

Keyes & Fox LLP and EQ Research LLC are pleased to provide CEA's Board of Directors with this informational memo describing recent developments in key California regulatory and compliance-related updates from the California Public Utilities Commission (CPUC). Additional information is available in CEA's Digest of Regulatory Updates.

IRP Rulemaking (R.25-06-019)

- On March 5, the CPUC issued D.26-02-057 which requires LSEs like CEA to conduct additional Mid-Term Reliability procurement in 2030, 2031, and 2032, of which 25% by 2032 must be clean-firm resources with a capacity factor of at least 80% or long-duration storage capable of discharging at full capacity for eight or more hours. CEA's obligations, shown in Attachment A, are 25 MW in each of the three years, for a total of 75 MW, of which 19 MW must be from clean-firm or long-duration storage resources.

- On March 9, the CPUC issued a Ruling extending the filing deadline for LSE IRPs from June 1 to **August 10** and the deadline for filing comments on IRPs to September 21.

ERRA/PCIA Reform (R.25-02-005)

- In Track 2, CalCCA and the Joint IOUs filed opening testimony on March 2.
  - CalCCA's testimony emphasizes that indifference requires valuing all attributes used for bundled customers' compliance with RPS requirements, including that the pre-2019 banked RECs should be valued at the current Market-Price Benchmark (MPB) as a credit to the Power Charge Indifference Adjustment (PCIA), or, alternatively, the pre-2019 banked RECs should be allocated to the now-departed customers.
  - The Joint IOUs point to changes to the PCIA methodology implemented in 2019 in support of their claim that no credit should be given for pre-2019 banked RECs.

- On February 20, the CPUC issued a Ruling requesting comments by March 27 and reply comments by April 10 on issues that should be included in the scope of Track 3. Suggested preliminary topics include revisions to the Market-Price Benchmarks, changes to the IOUs' Bundled Procurement Plans, additional guidance on vintaging resources, and potential improvements to the PCIA and ERRA mechanisms.

Resource Adequacy (R.25-10-003)

- The Energy Division Report on RA transactability was released on February 23. The Report's finding that the potential gains do not outweigh the added complexity and risks was challenged in CalCCA's comments. The Report focused largely on whether transactability under the Slice-Of-Day (SOD) framework was necessary to enable RA compliance, in other words, whether the SOD framework resulted in increased RA deficiencies. As CalCCA pointed out in its comments, the Report's standard of assessment did not address the fundamental rationales for RA transactability of resource efficiency and cost savings. RA transactability was not proposed because it would be necessary for RA compliance under the SOD framework, but rather it was proposed as a means of increasing market efficiency and maximizing ratepayer affordability. CalCCA's comments went further, recommending that RA compliance be automated, emphasizing that the Report's claimed transactability implementation challenges and the Report's unspecified potential "unintended consequences" are lackluster attempts at justifying Energy Division's reluctance to adopt or pursue adoption of RA transactability.

Climate Credit (R.25-07-013)

- The February 9 Proposed Decision to temporarily pause the distribution of the 2026 Climate Credit is on the agenda for the Commission's March 19 meeting. The remainder of Phase 1A considers immediate changes to the distribution of the 2026 Climate Credit that will be determined in a second Phase 1A proposed decision expected to be issued by late March.

- Party comments in response to the Phase 1A questions presented in the Scoping Ruling were filed March 2 and reply comments were filed March 9. CalCCA's opening comments do not support immediate changes to the Climate Credit distribution and recommend a more in-depth analysis prior to changes, question affordability benefits from immediate changes, and highlight risk such as customer confusion, higher administrative costs, and potential inaccurate messaging. CalCCA's reply comments support other parties' recommendations to not pause the 2026 distribution because a pause will likely decrease affordability and increase customer confusion. SDG&E's opening comments support moving the 2026 Climate Credit distributions to the four highest-billed Summer months in 2026. CalAdvocates' opening comments support moving the 2026 distribution to the two highest-billed Summer months temporarily, until the changes resulting from Phase 1B are implemented.

- Phase 1B will address broader affordability-related changes to the Climate Credit distribution, including the timing of the distribution, number of distributions, eligibility for distributions, and potentially alternative methodologies for calculating the Climate Credit amount. A Phase 1B schedule is expected to be issued this Spring and will include concept proposals by parties and workshops with a Phase 1B proposed decision expected in early 2027.

Distribution Interconnection (R.25-08-004)

- On March 3, the CPUC issued a Scoping Memo and Ruling defining the issues to be addressed in Phase 1 to include modifications to some interconnection screens, modifications to IOU interconnection timelines and compliance, and revisions to the interconnection fee for non-Net Billing Tariff and non-Net Energy Metering resources. Additional phases will address remaining issue areas.