



## Workshop Slides and Recording

### **Proposed Enhancements to Energy Safety's Safety Culture Assessment (SCA) Guidelines**

The Office of Energy Infrastructure Safety held a public workshop on the Proposed Enhancements to Energy Safety's Safety Culture Assessment (SCA) Guidelines on July 24, 2026. A recording of the meeting can be found on Energy Safety's YouTube channel.

Workshop Recording: <https://www.youtube.com/watch?v=k90jbhnmhKW>

The slides presented during the meeting are attached to this document.

# Proposed Enhancements to Energy Safety's Safety Culture Assessment (SCA) Guidelines

July 24, 2026



# AGENDA

- 10:00 a.m. Introduction and Opening Remarks from Energy Safety
- 10:10 a.m. Energy Safety Presentation on Proposed SCA Enhancements
- 10:30 a.m. Large Electrical Corporation Presentations
- 11:30 a.m. Discussion of Energy Safety and Large Electrical Corporation Presentations
- 11:55 a.m. Wrap Up
- 12:00 p.m. Adjourn

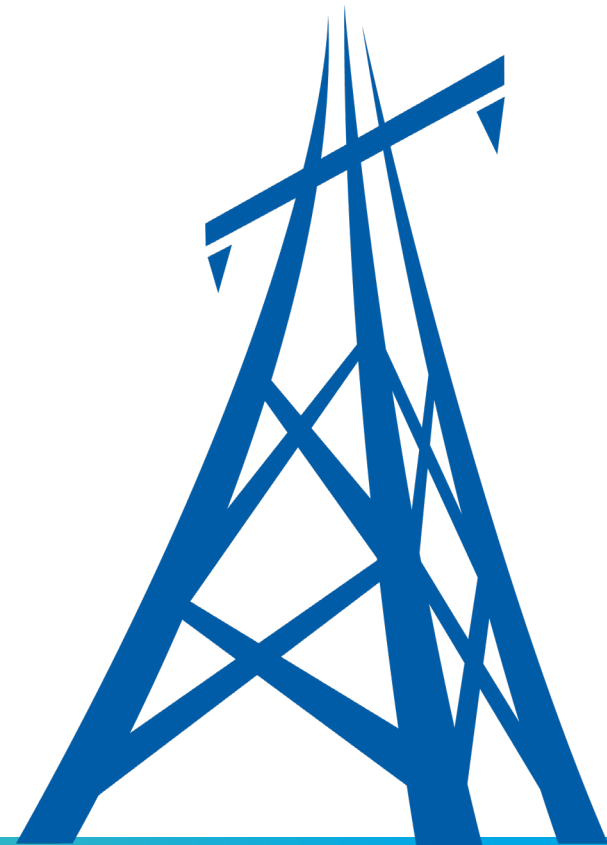




# **INTRODUCTION & OPENING REMARKS**

# OBJECTIVES

- Present proposed enhancement to Energy Safety's SCA Process
- Discuss insights and lessons learned from the historical implementation of Energy Safety's SCA Process
- Present the large electrical corporation(s) experience with Energy Safety's SCA Process and recommendations for enhancements
- Gather public stakeholder feedback on the proposed enhancements to Energy Safety's SCA Process to inform the development of future SCA Guidelines





# Deputy Director Opening Remarks



# **PROPOSED SCA ENHANCEMENTS**

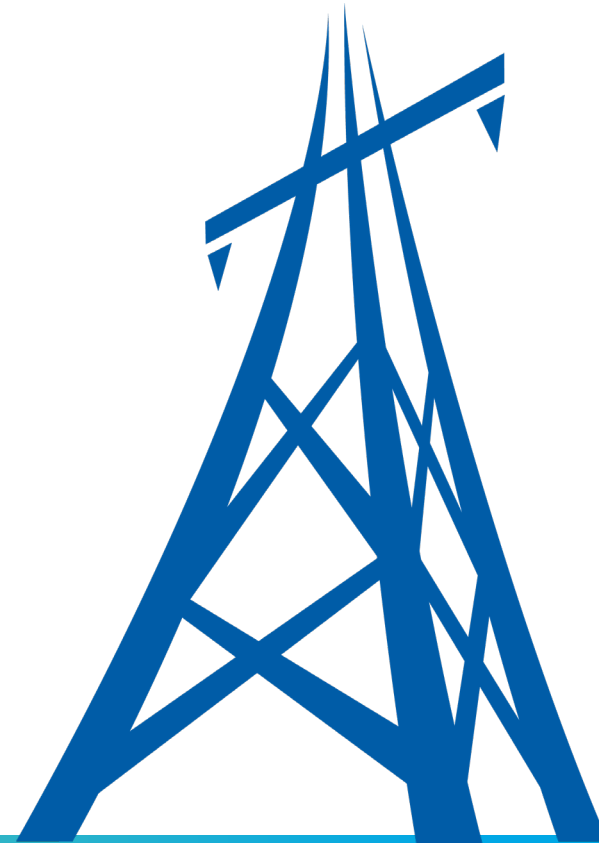


# SCA Overview

# SCA HISTORY

- Energy Safety conducted its first SCA and issued utility-specific assessment reports in 2021
- Energy Safety's most recent annual SCA reports were published on December 19, 2025<sup>1</sup>

<sup>1</sup>*The first SCA for LS Power was published in 2023.*



# ENERGY SAFETY SCA OVERVIEW

## Purpose

- Focused, independent assessment of safety culture within the electrical corporation (EC) wildfire work setting

## Background

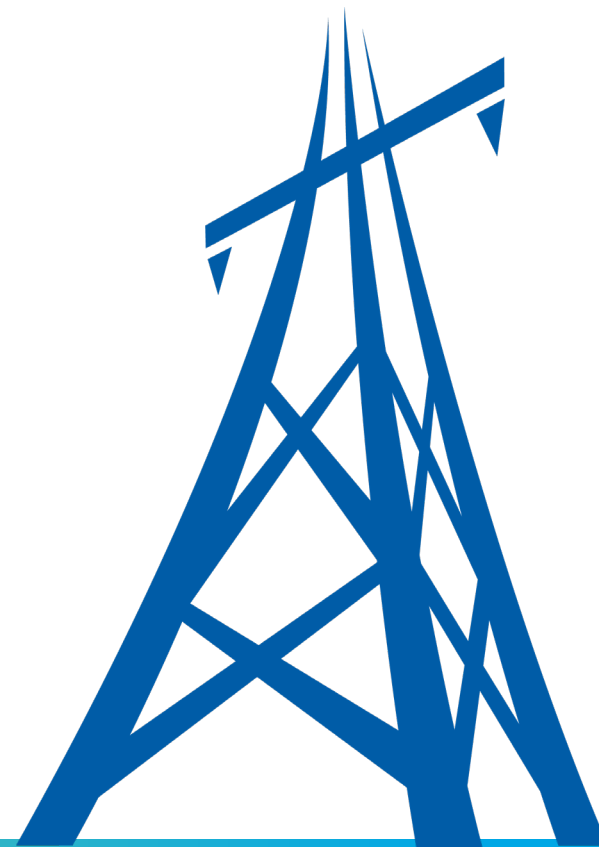
- Established by AB 1054, under Pub. Util. Code § 8389(d)(4)
  - SB 254 (2025) relocated requirements to Pub. Util. Code § 8386.2
- Agreeing to implement recommendations of the most recent SCAs is a required element of the 8389 Certificate



# ENERGY SAFETY SCA OVERVIEW

## SCA Process Overview

- Applies to nine electrical corporations: large electrical corporations (large ECs), small multi-jurisdictional utilities (SMJUs), and independent transmission operators (ITOs)
- Longitudinal view of wildfire work setting safety culture focused on continuous improvement over time
- Assessments now completed on a biennial timeline





# Planned SCA Enhancements

# INSIGHTS FROM THE 2024 SCA CYCLE (LARGE ECs)

## Safety Culture Themes

- Individuals at higher levels in the organization reported more positive perceptions of safety culture
- Performance pressures exist that may influence risk taking
- Risk management of public interactions continues to be the priority
- Different approaches and levels of maturity for event/hazard reporting and information sharing exist



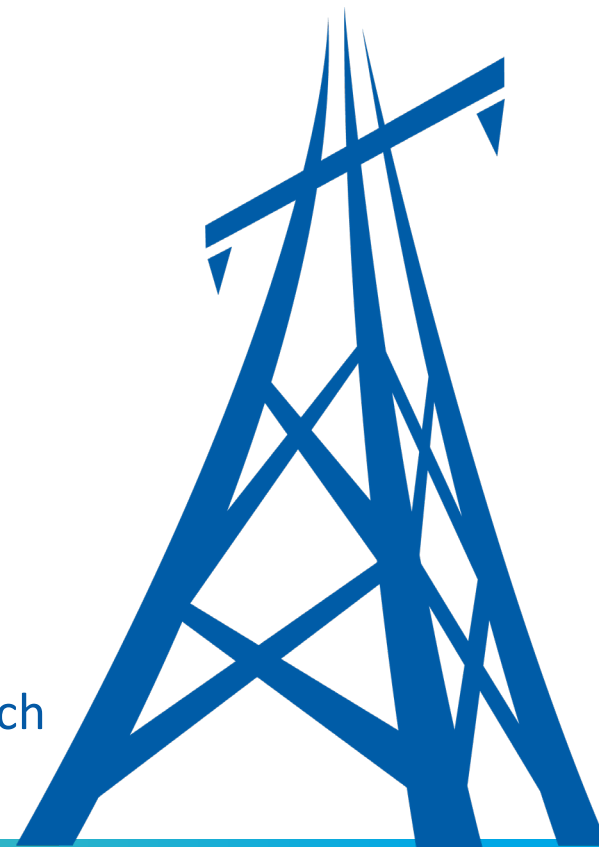
# INSIGHTS FROM THE 2024 SCA CYCLE (LARGE ECs)

## Management Self-Assessment Maturation

- Large ECs increasingly rated themselves at the highest maturity level: "Citizenship" in comparison with prior assessments

## Lessons Learned

- Assessment pre-planning with ECs is crucial for effective administration
- Supporting documentation provides context to the information gathered from other assessment elements
  - It enables Energy Safety to validate that the organizational practices match the perceptions of employees and values espoused by the organization



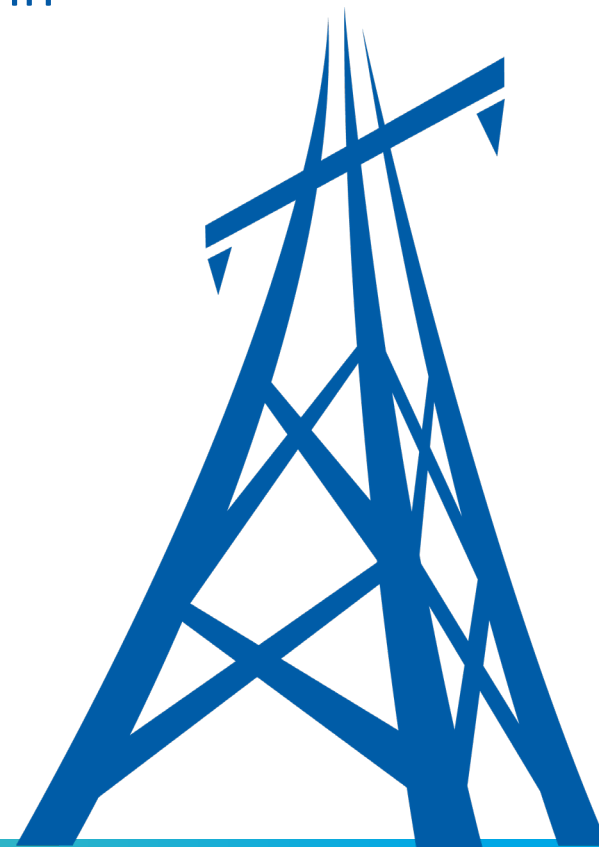
# INTENT FOR SCA PROCESS ENHANCEMENTS

## Objective

- Enhance Energy Safety's SCA Process to provide a more focused, in-depth assessment of the practice of safety culture within the electrical corporation wildfire work setting

## Key Drivers

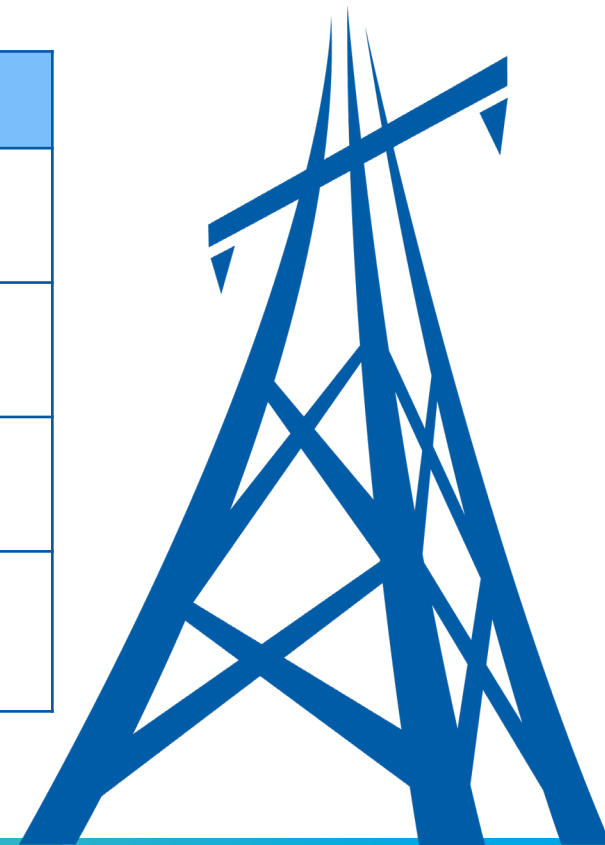
- Assess organizational performance of safety culture and organizational maturation over time
- Support continued organizational learning and sustained, measurable improvement



# EXISTING SCA PROCESS ELEMENTS

- The existing SCA Process includes the following elements for the large ECs, SMJUs, and ITOs.

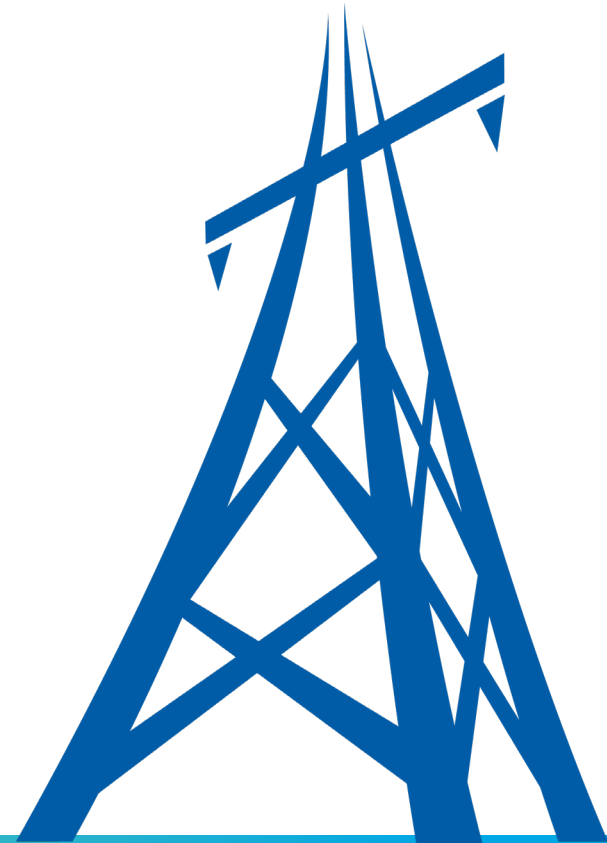
| Elements                                              | LECs | SMJUs | ITOs |
|-------------------------------------------------------|------|-------|------|
| Workforce Survey                                      | X    | X     |      |
| Focus Group and Follow-up Interviews                  | X    |       |      |
| Management Self-Assessment (MSA)                      | X    |       |      |
| Safety Culture Objectives and Lessons Learned (SCOLL) | X    | X     | X    |



# PROPOSED SCA ELEMENTS CARRIED FORWARD

Proposed existing SCA elements to carry forward:

- Workforce Survey
- Management Self Assessment
  - Proposed newly added requirement for SMJUs
- Interviews and Focus Groups
- Observational Visits
- Safety Culture Objectives and Lessons Learned
- Progress on Prior SCA Recommendations
- Supporting Documentation



# EXISTING SCA ELEMENTS – UNDER REVIEW

Energy Safety is considering enhancements to all elements, including, but not limited to:

- Management Self Assessment
  - Improve the ability to challenge existing assumptions, promote objective evaluation and support long-term organizational growth
- Maturity Model
  - Better capture incremental improvement, establish future safety objectives, and measure organizational progress and stagnation over time
- Safety Culture Objectives and Lessons Learned
  - Strengthen sustained organizational learning, demonstrate effectiveness of implemented change, and measure long-term organizational improvement



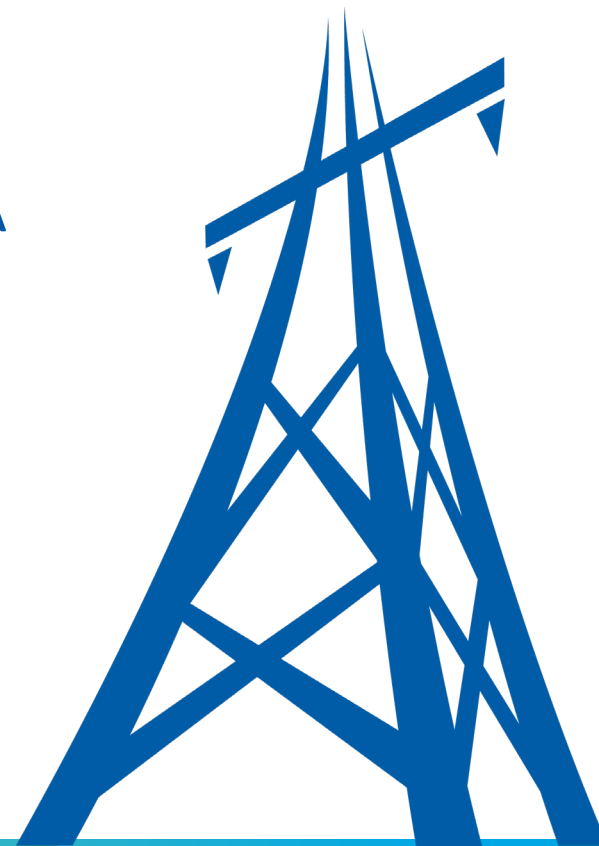
# PROPOSED NEW SCA ELEMENT

## Purpose

- Deeper assessment of systems, practiced behaviors, and shared understanding within specific areas of safety culture

## Process

- Initial focus areas of deeper assessment for the upcoming SCA cycle:
  - Near-miss reporting systems
  - Hazard reporting systems
  - Corrective action programs
- This new element will apply only to large ECs in the upcoming SCA cycle:
  - Future SCA cycles may expand this element to other EC categories.





# DATA DRIVEN FORWARD-THINKING INNOVATIVE SAFETY FOCUSED

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## OFFICE OF ENERGY INFRASTRUCTURE SAFETY

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# **ELECTRICAL CORPORATION PRESENTATIONS**

# Energy Safety – Safety Culture Assessment Workshop

July 24, 2026

**Bill Lalone**, Chief Safety Culture & Assessment Program Manager, Pacific Gas & Electric Company

**Ashley Simpson**, Director – Edison Safety, Southern California Edison Company

**Elizabeth Peters**, Acting Director – Safety, San Diego Gas & Electric Company



# Near-Miss, Hazard Reporting Systems and Corrective Action Programs



# Near-Miss/Hazard Reporting Systems and Corrective Action Programs: PG&E

## **1. What should the scope be of Energy Safety's inquiry of electrical corporation near-miss reporting systems, hazard reporting systems, and corrective action programs?**

- Focus on culture outcomes rather than program existence – that systems are effectively identifying risk, promoting organizational learning, and resulting in measurable performance improvement.

## **2. What elements of these systems and programs should be included within the inquiry scope?**

- Evaluate the entire learning cycle – (Hazard Identification, Reporting, Investigation, Corrective Actions, Effectiveness Reviews, Lessons Learned and Organizational Learning).

## **3. What recommendations would you offer for how near-miss reporting systems, hazard reporting systems, and corrective action programs should be examined?**

- The assessment should focus on effectiveness rather than procedural compliance.

## **4. What aspects of leadership behavior and management oversight of these systems and programs should be examined?**

- The assessment should examine both leadership actions and governance processes.

# Near-Miss/Hazard Reporting Systems and Corrective Action Programs: SCE

- 1. What should the scope be of Energy Safety's inquiry of electrical corporation near-miss reporting systems, hazard reporting systems, and corrective action programs?**
  - The assessment should evaluate whether near-miss reporting systems, hazard reporting systems, and corrective action programs provide a complete, risk-informed, and traceable process from issue identification through closure
- 2. What elements of these systems and programs should be included within the inquiry scope?**
  - Elements can include: definitions and reporting expectations, reporting channels and intake sources, review and classification processes, corrective action lifecycle, governance/oversight, metrics, and communication processes
- 3. What recommendations would you offer for how near-miss reporting systems, hazard reporting systems, and corrective action programs should be examined?**
  - Examine these systems and programs based on their level of effectiveness in identifying risk, enabling timely review, driving corrective actions, and supporting organizational learning
- 4. What aspects of leadership behavior and management oversight of these systems and programs should be examined?**
  - The assessment should examine whether leadership receives meaningful information from near-miss, hazard reporting, and corrective action programs and whether management oversight supports timely action, accountability, and learning

# Near-Miss/Hazard Reporting Systems and Corrective Action Programs: SDG&E

## **1. What should the scope be of Energy Safety's inquiry of electrical corporation near-miss reporting systems, hazard reporting systems, and corrective action programs?**

- Demonstrated cultural outcomes of proactive risk identification and mitigation, listening, learning and improvement

## **2. What elements of these systems and programs should be included within the inquiry scope?**

- Formal company-wide near miss reporting – employee and contractor – and corrective action programs
- Incident investigation and learning

## **3. What recommendations would you offer for how near-miss reporting systems, hazard reporting systems, and corrective action programs should be examined?**

- Examine through the lens of organizational learning and identifying opportunities for continuous improvement
- Acknowledge uniqueness of each IOU; no one-size fits all approach

## **4. What aspects of leadership behavior and management oversight of these systems and programs should be examined?**

- Demonstrated leadership commitment to providing resources and promoting a psychologically safe, learning environment

# Management Self- Assessment Processes and Maturity Evaluations



# Management Self Assessment Processes & Maturity Evaluations: PG&E

- 1. What enhancements to the existing management self-assessment process and/or maturity model would improve its ability to challenge existing assumptions, promote objective evaluation, and support long-term organizational learning?**
  - Increase independent challenge and objective validation.
  - Use performance data, workforce feedback, and trend analysis.
  - Focus on lessons learned, blind spots, and organizational learning.
- 2. Whether the existing maturity scale remains appropriate for supporting continuous improvement or if refinements are warranted to differentiate performance, identify opportunities for organizational growth, and capture incremental or transformational improvements.**
  - Retain the Maturity Model – Refine for higher performance levels
  - Better differentiate performance at advanced maturity levels (Sustainability, Learning Effectiveness, Innovation.)
- 3. How the maturity model or an alternative can be enhanced to establish future performance objectives, measure progress over time and relevant organizational stagnation once high levels of capability has been achieved?**
  - Measure Continuous Improvement (Improvement Objectives, Performance Trends, Learning Outcomes and Performance Trajectory)

# Management Self Assessment Processes & Maturity Evaluations: SCE

1. **What enhancements to the existing management self-assessment process and/or maturity model would improve its ability to challenge existing assumptions, promote objective evaluation, and support long-term organizational learning?**
  - Using the CPUC OIR's self-evaluation framework based on IAEA guidelines facilitates the integration of an objective third party expert perspective. This supports a structured challenge and learning process and further integrates two potentially overlapping SCA processes
  - Using the proposed OIR framework also allows for increased triangulation of evidence for each maturity rating using survey data, qualitative feedback and observations/documentation review
  - Triangulated evidence can also help to inform more robust safety culture objectives and lessons learned, further integrating all components of the Wildfire SCA
2. **Whether the existing maturity scale remains appropriate for supporting continuous improvement or if refinements are warranted to differentiate performance, identify opportunities for organizational growth, and capture incremental or transformational improvements.**
  - The existing maturity scale remains appropriate for supporting continuous learning and can be enhanced by the triangulation of data referenced above to better align ratings with evidence
  - Consider replacing date and expected maturity rating section with focused learning goals informed by data triangulation and broader SCA results
3. **How the maturity model or an alternative can be enhanced to establish future performance objectives, measure progress over time and relevant organizational stagnation once high levels of capability has been achieved?**
  - Maturity models can help to describe where an organization is on its safety culture journey, but the primary purpose of an assessment is to support continuous learning and improvement
  - Progress and future performance objectives should be established through triangulated evidence including surveys, interviews, observations, organizational learning, corrective action effectiveness, adaptability, and workforce trust tracked over time

# Management Self Assessment Processes & Maturity Evaluations: SDG&E

1. **What enhancements to the existing management self-assessment process and/or maturity model would improve its ability to challenge existing assumptions, promote objective evaluation, and support long-term organizational learning?**
  - Align and integrate with CPUC comprehensive assessment and self evaluation – timing, issuance and model
  - Enhance maturity scoring with more qualitative measurement of continuous improvement efforts
2. **Whether the existing maturity scale remains appropriate for supporting continuous improvement or if refinements are warranted to differentiate performance, identify opportunities for organizational growth, and capture incremental or transformational improvements.**
  - As our safety culture matures, our “goal post” moves forward as we are always striving for improvement. Recognition that culture is not static and can move forward or backwards.
  - Current scoring model is appropriate but is limited; consider focusing on longer term goals and improvements informed by SCA results
3. **How the maturity model or an alternative can be enhanced to establish future performance objectives, measure progress over time and relevant organizational stagnation once high levels of capability has been achieved?**
  - Maturity models can help measure where an organization is on its safety culture journey at a given period in time but should focus on continued progress and growth

# Safety Culture Objectives, Lessons Learned, and Organizational Learning



# Safety Culture Objectives, Lessons Learned (SCOLL) & Organizational Learning: PG&E

1. **To what extent does the existing SCOLL element encourage reflection, knowledge sharing and sustained organizational learning rather than simply documenting planned or completed actions?**
  - SCOLL does encourage reflection because it requires organizations to look back on their objectives, actions, and lessons learned and ask, "What did we learn?" and "What should we do differently going forward?"
2. **Does the current SCOLL provide sufficient insight into how lessons learned and objectives influence leadership decision-making, risk-management, operational performance, and safety culture?**
  - The current SCOLL provides some visibility into objectives, actions, and lessons learned; however, additional emphasis is needed to demonstrate how those lessons influence leadership decisions and operational outcomes
  - In many cases, SCOLL captures the completion of planned activities. However, demonstrating the connection between lessons learned, leadership decisions, and measurable outcomes would provide a more complete picture of organizational health and safety culture maturity.
3. **How could the lessons learned component be enhanced to better document organizational learning, demonstrate the effectiveness of implemented changes, identify recurring or systemic issues, and measure long-term organizational improvement?**
  - The lessons learned component could be strengthened by using a structured learning cycle that documents key findings, actions taken and their rationale, effectiveness measures, outcomes, additional learning, and whether the issue was resolved or recurred.
4. **How could the lessons learned element be more effectively integrated with other assessment elements – such as management self-assessments, maturity model evaluations, safety culture objectives, and performance metrics – to provide a more comprehensive assessment of organizational health and continuous improvement?**
  - Consistent with International Atomic Energy Agency (IAEA) principles, lessons learned should be integrated with assessments, corrective actions, and performance metrics to show how organizations learn, adapt, and continuously improve.

# Safety Culture Objectives, Lessons Learned (SCOLL) & Organizational Learning: SCE

1. **To what extent does the existing SCOLL element encourage reflection, knowledge sharing and sustained organizational learning rather than simply documenting planned or completed actions?**
  - The existing SCOLL is directionally valuable when framed as an organizational learning narrative informed by triangulated assessment data
  - IOUs ensuring that lessons learned include specific, actionable and measurable objectives with practical, time-bound actions and responsible owners drives accountability to ensure learnings are embedded
2. **Does the current SCOLL provide sufficient insight into how lessons learned and objectives influence leadership decision-making, risk-management, operational performance, and safety culture?**
  - Partially. SCOLL can provide insight when objectives, lessons, decisions, performance metrics, and cultural signals are explicitly linked
  - SCOLL can provide sufficient insight into how lessons learned and objectives influence leadership decision-making, performance, and safety culture if it is informed by a comprehensive SCA with triangulated evidence, and is paired with self-assessments to understand progress and impact
3. **How could the lessons learned component be enhanced to better document organizational learning, demonstrate the effectiveness of implemented changes, identify recurring or systemic issues, and measure long-term organizational improvement?**
  - Enhancements could include documenting: root causes and contributing factors, organizational assumptions that were challenged, systemic themes observed across multiple events, corrective action effectiveness reviews, long-term outcome indicators, recurrence monitoring
4. **How could the lessons learned element be more effectively integrated with other assessment elements – such as management self-assessments, maturity model evaluations, safety culture objectives, and performance metrics – to provide a more comprehensive assessment of organizational health and continuous improvement?**
  - Consistent with the IAEA systems-thinking approach the ultimate objective should be understanding how leadership behaviors, management systems, workforce engagement, operational performance, and organizational learning interact to influence wildfire safety outcomes

# Safety Culture Objectives, Lessons Learned (SCOLL) & Organizational Learning: SDG&E

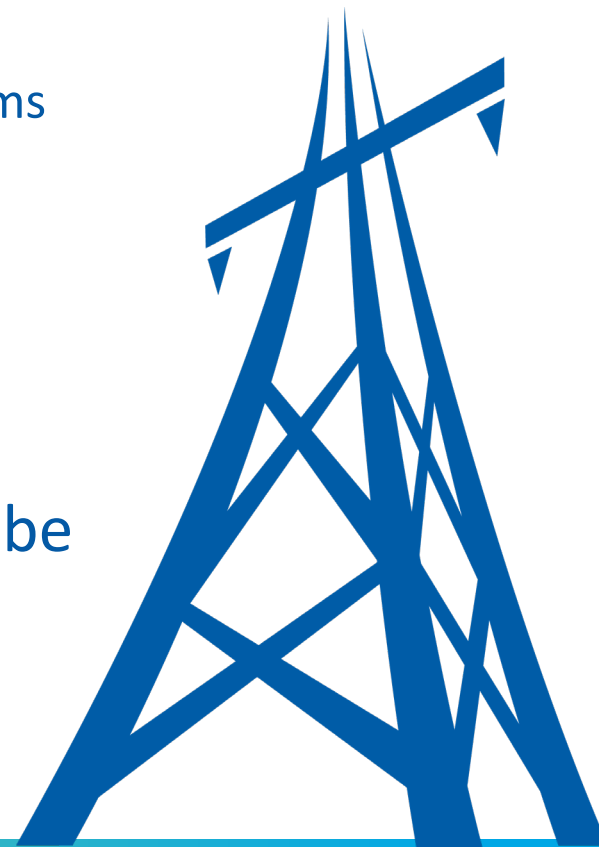
- **To what extent does the existing SCOLL element encourage reflection, knowledge sharing and sustained organizational learning rather than simply documenting planned or completed actions?**
  - SCOLL encourages reflection, sharing and learning; SDG&E leverages for discussion amongst management and leadership
  - Allows for communication to broader organization on the results
  - Provides action planning for continuous improvement (SDG&E examples of resulting improvements include increased external stakeholder communication and collaboration)
- **Does the current SCOLL provide sufficient insight into how lessons learned and objectives influence leadership decision-making, risk-management, operational performance, and safety culture?**
  - SCOLL provides insights into how lessons learned and objectives influence leadership decision-making, risk-management, operational performance, and safety culture
    - Examples: Double Down listening sessions, advance customer notification process, Cal FIRE partnership
- **How could the lessons learned component be enhanced to better document organizational learning, demonstrate the effectiveness of implemented changes, identify recurring or systemic issues, and measure long-term organizational improvement?**
  - Demonstrated follow-up actions – investigation, sharing of lessons learned and resulting safety improvements
- **How could the lessons learned element be more effectively integrated with other assessment elements – such as management self-assessments, maturity model evaluations, safety culture objectives, and performance metrics – to provide a more comprehensive assessment of organizational health and continuous improvement?**
  - Lessons learned and demonstrated safety improvements indicate continued growth that may not necessarily be reflected in a static maturity score based on the current model. Less quantitative and more qualitative maturity measurement may allow showing of continued growth.



# DISCUSSION

# FACILITATED DISCUSSION

- Energy Safety is seeking stakeholder perspectives on:
  - Proposed deep dive element:
    - Near-Miss/Hazard Reporting Systems and Corrective Action Programs
  - Management Self Assessment and Maturity Model
  - Safety Culture Objectives and Lessons Learned
- Feedback from today's discussion will inform updates and enhancements to the SCA process, which will subsequently be reflected in revisions to the SCA Guidelines.

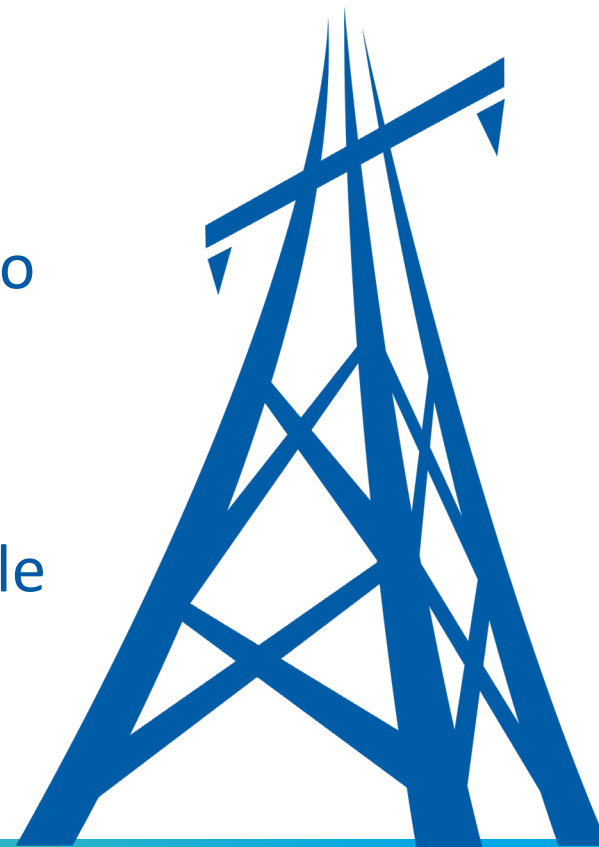




# WRAP UP

# CLOSING REMARKS

- Thank you for participating and for your valuable feedback
- Your input will help inform updates and enhancements to Energy Safety's SCA Guidelines
- Stakeholders may provide written responses or comments to the workshop topic via e-filing in Energy Safety's SCA Guidelines Docket by July 31, 2026
- Additional opportunities for public comment will be available when the Draft Guidelines are published later this year





# DATA DRIVEN FORWARD-THINKING INNOVATIVE SAFETY FOCUSED

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