Party People

How to Become Party to a CPUC Proceeding

Rochelle Butler, SJVCEO

Aisha Cervantes-Cissna, SDCP

Maria Kelly, CPUC

Welcome to the Party!

Why We're Here Today

The CPUC makes decisions that affect your community every day.

Today, you'll learn how to get a standing invite to the party, and you'll actually DO IT before you leave this room.

Your Party Supplies

- 🎩 Party hat: put it on!
- 🎺 Kazoo: make some noise!
- 🧁 Cupcakes: enjoy!

Kazoo Check #1

Let's see what you know!

+ Have you ever heard of the CPUC?
+ Have you ever participated in a CPUC proceeding?

Now let's play: Does the CPUC cover this?

Answers on the next slide

Does the CPUC Cover This?

Energy utilities?

✅ YES

Water utilities?

✅ YES

Phone & internet?

✅ YES

Uber & Lyft?

✅ YES

Rail transit?

✅ YES

Airports?

❌ NO (FAA)

Roads & highways?

❌ NO (Caltrans)

Garbage collection?

❌ NO (Local gov)

Why Would I Go to the Party?

Maria Kelly, CPUC

🎤 Have a voice in decisions that affect your community

📝 Share concerns and recommendations

📊 Submit evidence or testimony

⚖️ Help influence the outcome

🤝 Build coalitions and partnerships

Your evidence-based input and local knowledge help strengthen the record

Why I Came to the Party

Aisha Cervantes-Cissna, SDCP

My Journey

+ 10 years in local government energy
+ CivicSpark→Programs (CAP, transportation)→Policy at CCAs

The Turning Point

+ Capital Fellow Program offered a fellowship and told me:

"Local government is where the real change happens.
We rely on local experience to know what state policy to create."

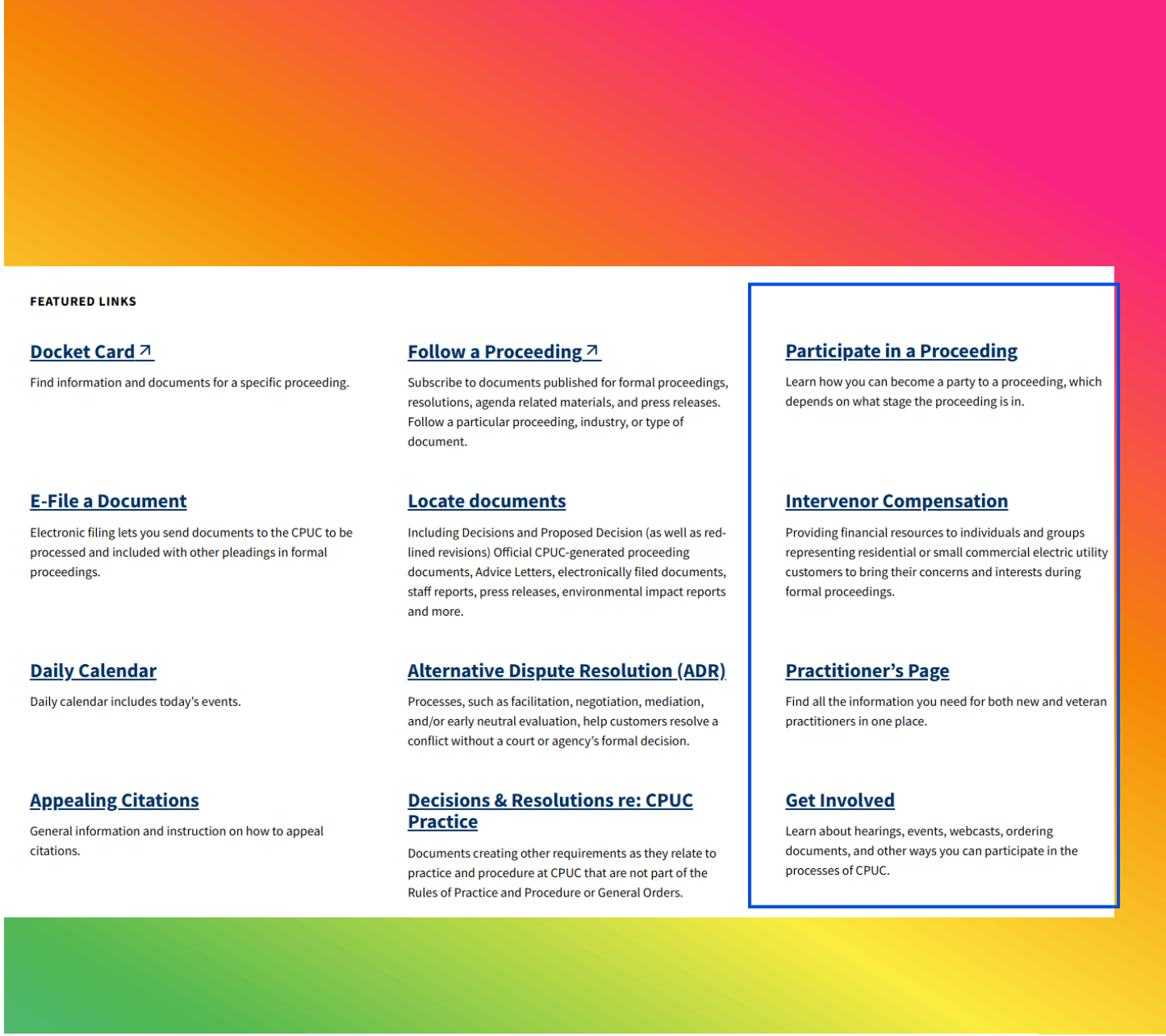
I turned them down. I believed them.

Invitation to the Party

Proceedings and Rulemaking

Maria Kelly, CPUC

- Do not need to be an attorney to request party status
- Individuals, community groups, small and large businesses, local government, government agencies



FEATURED LINKS

Docket Card ↗

Find information and documents for a specific proceeding.

Follow a Proceeding ↗

Subscribe to documents published for formal proceedings, resolutions, agenda related materials, and press releases. Follow a particular proceeding, industry, or type of document.

Participate in a Proceeding

Learn how you can become a party to a proceeding, which depends on what stage the proceeding is in.

E-File a Document

Electronic filing lets you send documents to the CPUC to be processed and included with other pleadings in formal proceedings.

Locate documents

Including Decisions and Proposed Decision (as well as red-lined revisions) Official CPUC-generated proceeding documents, Advice Letters, electronically filed documents, staff reports, press releases, environmental impact reports and more.

Intervenor Compensation

Providing financial resources to individuals and groups representing residential or small commercial electric utility customers to bring their concerns and interests during formal proceedings.

Daily Calendar

Daily calendar includes today's events.

Alternative Dispute Resolution (ADR)

Processes, such as facilitation, negotiation, mediation, and/or early neutral evaluation, help customers resolve a conflict without a court or agency's formal decision.

Practitioner's Page

Find all the information you need for both new and veteran practitioners in one place.

Appealing Citations

General information and instruction on how to appeal citations.

Decisions & Resolutions re: CPUC Practice

Documents creating other requirements as they relate to practice and procedure at CPUC that are not part of the Rules of Practice and Procedure or General Orders.

Get Involved

Learn about hearings, events, webcasts, ordering documents, and other ways you can participate in the processes of CPUC.

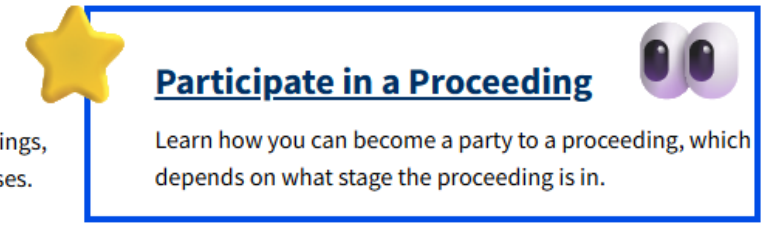
Where This Party Happens

Maria Kelly, CPUC

Proceedings and rulemakings are where policy gets made.

This is where decisions happen.

+ Utility rates and bills
+ Service quality and reliability
+ Safety requirements
+ Consumer protection
+ Energy efficiency programs



Kazoo Check #2

Let's see what you know!

+ Have you ever been pulled into a policy conversation too late?
+ Have you ever felt your work was misunderstood by policymakers?

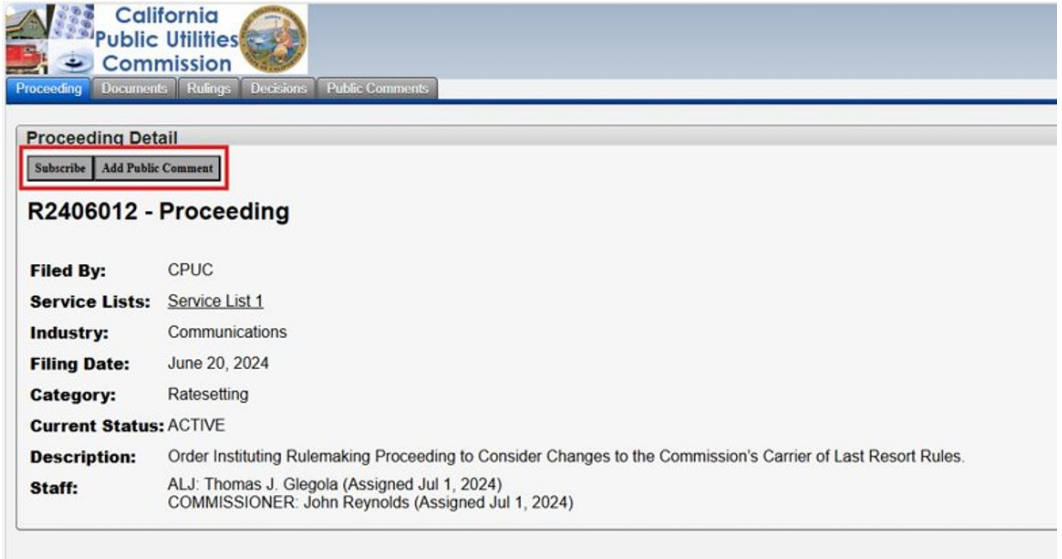
Now, back to the party!

Party Planning Page

Maria Kelly, CPUC

Lower-barrier ways to start engaging

- 🗓️ Attend voting meetings
  Open to the public - just show up
- 🎤 Public participation hearings
  Your chance to speak on the record
- 🛠️ Workshops
  More informal, collaborative sessions
- ✍️ Written comments
  Submit via cpuc.ca.gov/docket

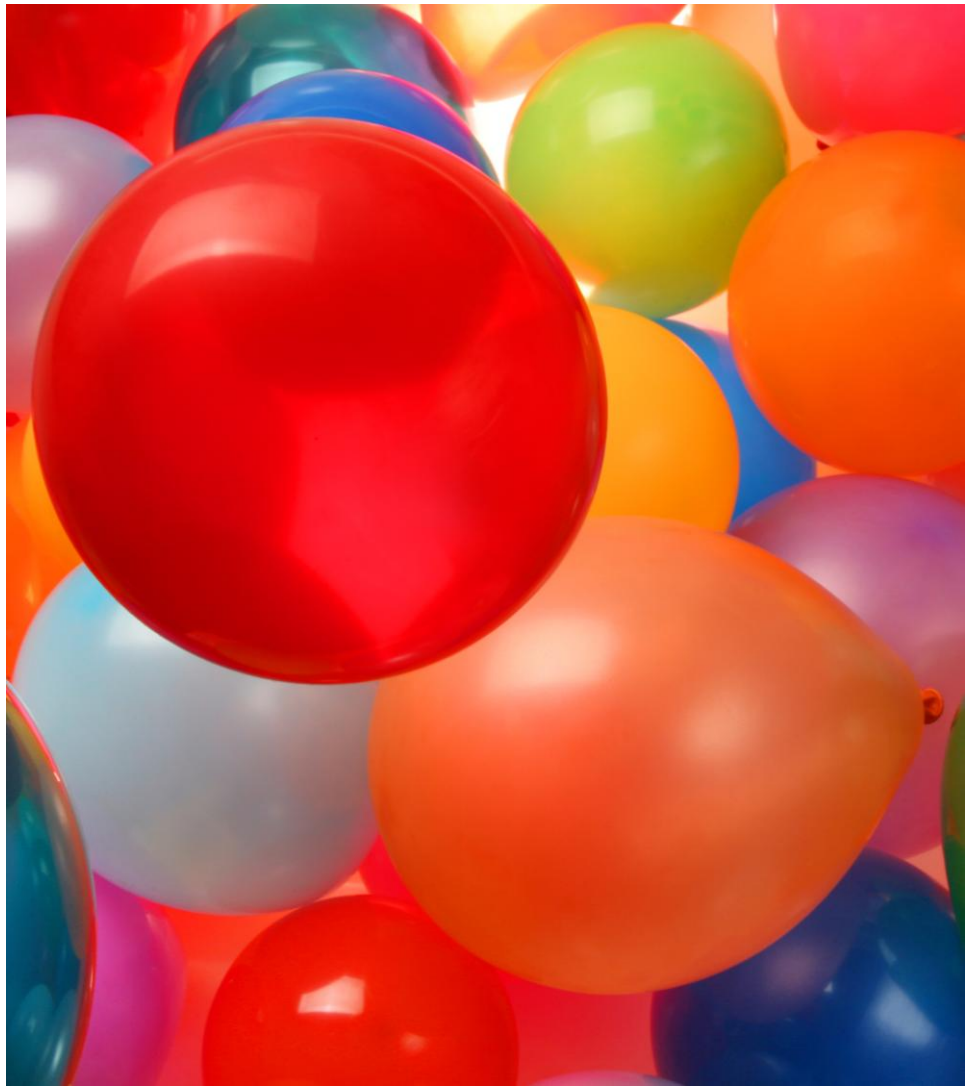


Way to Party & What to Know Before You Go

Maria Kelly, CPUC

Multiple ways to participate:

- Participate in a proceeding–file an application, petition or complaint
- Comment, protest a response to an application or petition
- Make an oral argument to become a party at a prehearing conference or hearing
- File a motion to become a party!



Where the Party's At

Practitioners Page

Maria Kelly, CPUC

Where do I want to party?

+ Utility rates and bills?
+ Service quality and reliability?
+ Safety requirements?
+ Consumer protection?
+ OR comment on proceeding, application, decision, and track:

  Rulemakings

  Applications

Table Talk

What issues in your community would you want to weigh in on?

5 minutes, then we'll hear from a few tables

Big Wins on the Dance Floor

Aisha Cervantes-Cissna, SDCP

Real stories of local government impact

Win #1: Regional Energy Networks

Aisha Cervantes-Cissna, SDCP

Challenge

+ Obtaining CPUC authorization of multi-million dollar budgets to form two new Regional Energy Network portfolio administrators.

Strategy

+ Educated early and often
+ Summarized complex filings for Commissioners
+ Avoided legalese—focused on clarity and storytelling
+ Researched Commissioners to tailor framing

Takeaway: Don't underestimate being personable and persistent. You don't always need a lawyer. Trust opens doors.

Win #2: Net Energy Metering Fix

Aisha Cervantes-Cissna, SDCP

Challenge

+ Net Billing Tariff decision language needed IOUs to collaborate with CCAs on unbundled customer bill understanding

Strategy

+ Built trust and working relationship with CPUC staff
+ Shared information on CCA tariff designs
+ Recruited billing SMEs to develop specific alternative language
+ Facilitated ex parte meetings with Commissioners

Takeaway: Targeted fixed language, delivered with credibility and relationships, can shift the tone and trajectory of policy

Win #3: Interconnection Bill

Aisha Cervantes-Cissna, SDCP

Challenge

+ Needed to pass legislation to launch a CPUC process improving interconnection—required real-world evidence.

Strategy

+ Invited planning staff to decisionmaker meetings
+ Gathered their real-world stories and experiences
+ Connected local expertise to legislative staff
+ Let the practioners speak for themselves

Takeaway: You don't have to be the expert—just the person who brings the right people together at the right time.

How to Work the Room

Lessons Learned from the Dance Floor

Aisha Cervantes-Cissna, SDCP

+ You don't need to be a policy expert to engage
+ Download and adapt motions from other local governments
+ Your day-to-day operations perspective is valuable
+ Starting earlier makes a significant difference
+ Meetings are just as important as written comments
+ You don't need a lawyer
+ Your comments don't need to be long or in legalese

Myth Busting

Aisha Cervantes-Cissna, SDCP

X “Data speaks for itself”

X “They’ll ask when they need me.”

X “I’m not a policy person.”

X “It’s not my job.”

X “I need a lawyer.”

+ It doesn’t. It needs framing and relevance.
+ By then, it might be too late to change the outcome.
+ You don’t have to be—you have insight others don’t.
+ If it affects your community, it’s worth your voice.
+ You don't. Clarity beats legalese every time.

Is that the Cops?

Kidding. Take a quick break and grab a cupcake!

We'll start the hands-on portion of the workshop in 4 minutes

Join the Party

Maria Kelly, CPUC

+ Create an account at efile.cpuc.ca.gov
+ Join a service list

  Rulemaking R.25-04-010, EE
+ Subscribe to updates
+ File for party status to a proceeding

🎺 Stuck? Blow your kazoo and we'll come help!

Ways to Party in the Proceedings

Formal Participation

"Participating as a **Formal Party** provides the most potential to impact the outcome of CPUC proceedings."

Informal Participation

"**Informal** comments are not considered evidence nor are they included in the formal record on which a decision is based."

Party Supplies

- Methods (we do #4): https://www.cpuc.ca.gov/proceedings-and-rulemaking/cpuc-public-participation-hearings/methods-for-becoming-a-party-to-a-proceeding
- Document templates: https://www.cpuc.ca.gov/proceedings-and-rulemaking/cpuc-public-participation-hearings/creating-formal-documents---templates-provided
- Rules of Practice and Procedure: http://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M164/K610/164610801.PDF

Getting In in 4 Steps

I. INTRODUCTION

Pursuant to Rules 1.4 of the California Public Utilities Commission's (CPUC) Rules of Practice and Procedure, the [*Organization Name*] respectfully moves for party status in this proceeding.

II. DISCUSSION

Brief description of organization and interest/involvement in proceeding and why CPUC should have organization's input on proceeding. ***Must end section with****:*

[*Organization Name*]'s participation in this proceeding will not prejudice any party, delay the schedule or broaden the scope of issues in this proceeding.

III. SERVICE

Service of notices, orders, and other correspondence in this proceeding should be directed to the [*Organization Name*] at the address set forth below:

[*Name*]

[*Title*]

[*Organization Name*]

[*Street Address, City, State, Zip*]

Tel: [*phone number*]

Email: [*email address*]

IV. CONCLUSION

[*Organization Name*] respectfully requests that the CPUC expedites approval of this request so that it may file [*reply comments*] regarding the ruling of Assigned Commissioner [*Commissioner Name*] and Administrative Law Judge [*ALJ Name*] seeking input on [*brief description of ruling i.e. approaches for statewide and third-party programs*] by the [*deadline date*] deadline. For the reasons stated above, [*Organization Name*] respectfully requests that it be granted party status in this proceeding.

Dated: [*Date*]

Respectfully submitted,

[*Signature*]
[*Name*]
[*Title*]
[*Organization Name*]
[*Street Address, City, State, Zip*]
[*phone number*]
[*email address*]

Let Them Know You're Coming

!

BEFORE THE PUBLIC UTILITIES COMMISSION
OF THE STATE OF CALIFORNIA

Order Instituting Rulemaking Concerning Energy Efficiency Rolling Portfolios, Policies, Programs, Evaluations, and Related Issues	Rulemaking 13-11-005 (Filed November 14, 2013)

CERTIFICATE OF SERVICE

I hereby certify that I have on this date caused the attached

MOTION FOR PARTY STATUS OF SAN JOAQUIN VALLEY CLEAN ENERGY ORGANIZATION

to be served pursuant to the CPUC's Rules of Practice and Procedure upon the official service list for R.13-11-005, obtained from the CPUC's website and attached hereto, by electronic mail (e-mail) to all persons with a valid e-mail address on the official service list and by U.S. Mail to all parties without a valid e-mail address on the official service list. I have also sent a hard copy by U.S. Mail to the Assigned Administrative Law Judge in this proceeding.

Executed June 22, 2016 at Fresno, California.

/s/ Courtney Kalashian

Courtney Kalashian
Executive Director
!San Joaquin Valley Clean Energy Organization
Tel: (877) 748-0841
E-mail: ckalashian@pesc.com

CALIFORNIA PUBLIC UTILITIES COMMISSION
Service Lists

PROCEEDING: R1311005 - CPUC - OIR CONCERNIN
FILER: CPUC
LIST NAME: LIST
LAST CHANGED: JUNE 22, 2016

Parties

ANGELA HACKER
COUNTY OF SANTA BARBARA
EMAIL ONLY
EMAIL ONLY, CA 00000
FOR: COUNTY OF SANTA BARBARA, EMPOWER
FOR: THE GREENLINING INSTITUTE

CARMELITA L. MILLER
LEGAL COUNSEL
THE GREENLINING INSTITUTE
EMAIL ONLY
EMAIL ONLY, CA 00000

CHARLES CORMANY
EXECUTIVE DIRECTOR
EFFICIENCY FIRST CALIFORNIA (EF CA)
EMAIL ONLY
EMAIL ONLY, CA 00000
FOR: CALIFORNIA BUILDING PERFORMANCE CONTRACTORS ASSOCIATION DBA EFFICIENCY FIRST CALIFORNIA (EF CA)

HOWARD CHOY
G.M., OFFICE OF SUSTAINABILITY
COUNTY OF LOS ANGELES
EMAIL ONLY
EMAIL ONLY, CA 00000
FOR: SOUTHERN CALIFORNIA REGIONAL ENERGY NETWORK (SCREN)

HOWARD W. CHOY
DIVISION MANAGER
LOS ANGELES COUNTY ISD, FACILITIES OPERA
EMAIL ONLY
EMAIL ONLY, CA 00000
COUNCIL FOR: LOCAL GOVERNMENT SUSTAINABLE ENERGY COALITION (LGSEC)

LARA ETTENSON
NATURAL RESOURCES DEFENSE DOUNCIL
EMAIL ONLY
EMAIL ONLY, CA 00000
FOR: NATURAL RESOURCES DEFENSE COUNCIL (NRDC)

SHANDRA (TIGER) ADOLF
DIR - PROGRAM DESIGN / MKT DEVELOPMENT
BUILDING PERFORMANCE INSTITUTE, INC.
COMPANIES
EMAIL ONLY
EMAIL ONLY, CA 00000
FOR: BUILDING PERFORMANCE INSTITUTE, INC. (BPI)

DONALD GILLIGAN
PRESIDENT
NATI'L ASSN. OF ENERGY SVC.
1615 M STREET, NW
WASHINGTON, DC 20036
FOR: NATIONAL ASSOCIATION OF ENERGY SERVICE COMPANIES (NAESCO)

GREG MERRITT
CREE, INC.
4600 SILICON DRIVE
DURHAM, NC 27703
FOR: CREE, INC.
FOR: NATIONAL COMFORT INSTITUTE

ROB FALKE
PRESIDENT
NATIONAL COMFORT INSTITUTE
PO BOX 147
AVON LAKE, OH 44012

KRISTIN ANDERSON
PRESIDENT
OCCAM'S ENERGY CONSULTING, INC.
4015 W 65TH STREET, SUITE 302
MINNEAPOLIS, MN 55435

JUSTIN SEGALL
FOUNDER & EXECUTIVE VICE PRESIDENT
SIMPLE ENERGY
1215 SPRUCE ST., STE. 301
BOULDER, CO 80302-4839

!

CERTIFICATE OF SERVICE

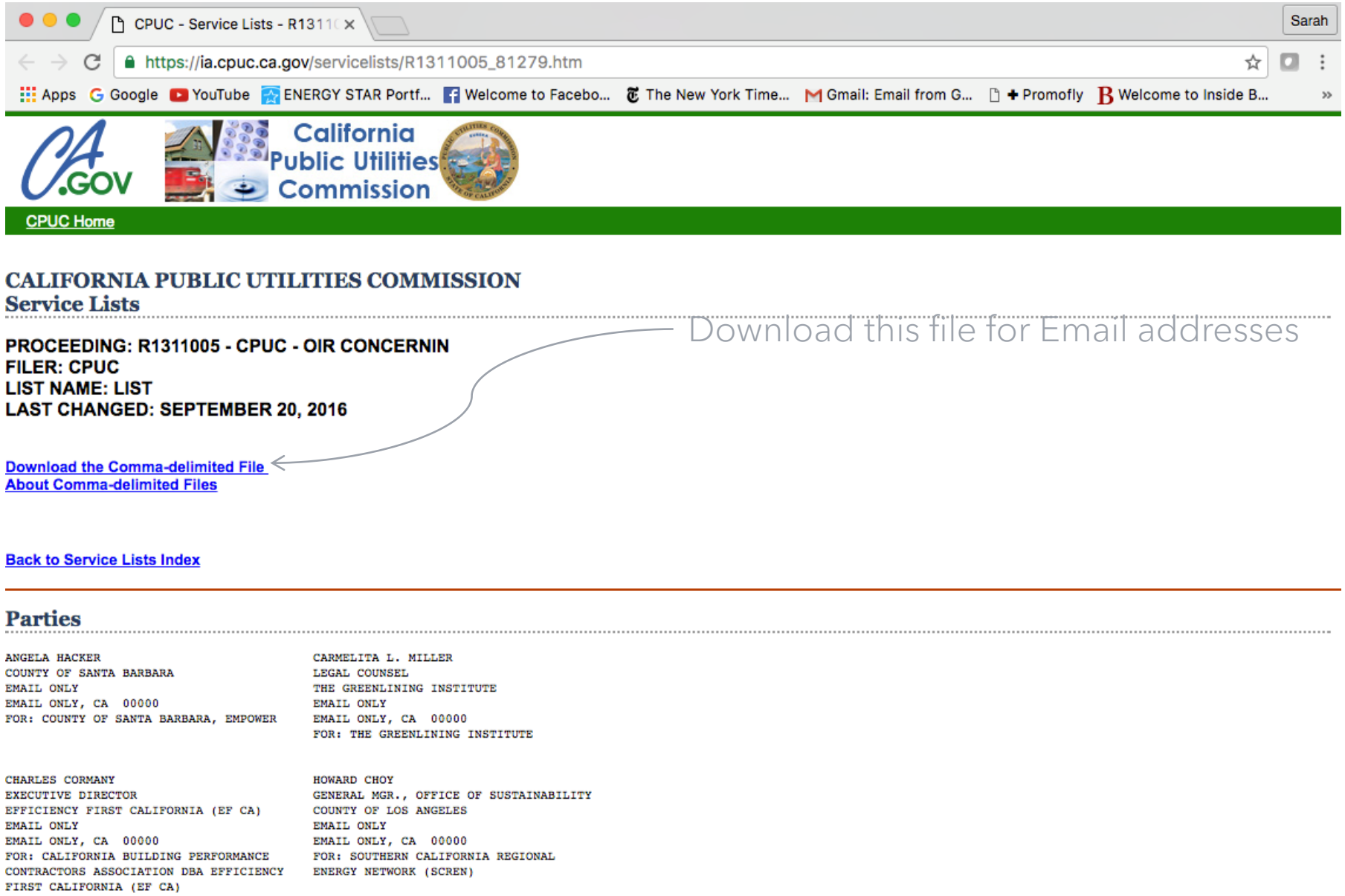
I hereby certify that I have on this date caused the attached

MOTION FOR PARTY STATUS OF [*ORGANIZATION NAME*]

to be served pursuant to the CPUC's Rules of Practice and Procedure upon the official service list for R. [*Rulemaking #*], obtained from the CPUC's website and attached hereto, by electronic mail (e-mail) to all persons with a valid e-mail address on the official service list and by U.S. Mail to all parties without a valid e-mail address on the official service list. I have also sent a hard copy by U.S. Mail to the Assigned Administrative Law Judge in the proceeding.

Executed [*date*] at [*City, State*]
[*Signature*]
[*Name*]
[*Title*]
[*Organization Name*]
Tel: [*Telephone Number*]
Email: [*Email Address*]

Find Service lists at http://ia.cpuc.ca.gov/servicelists

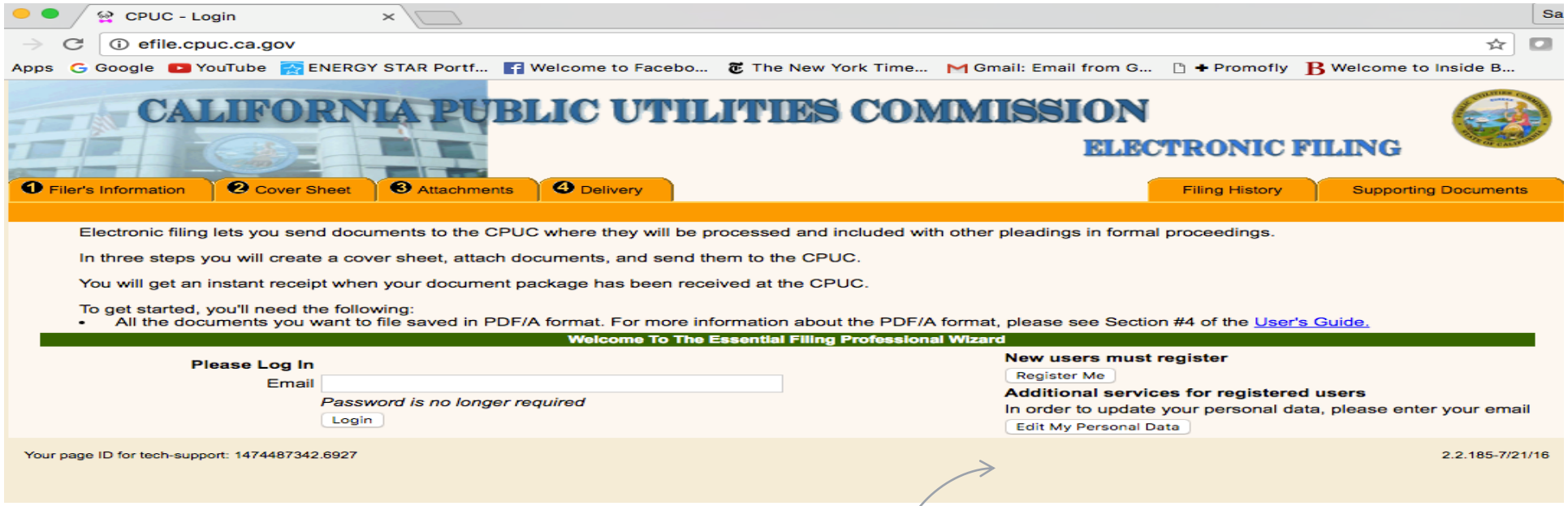


PDF/A Compliance

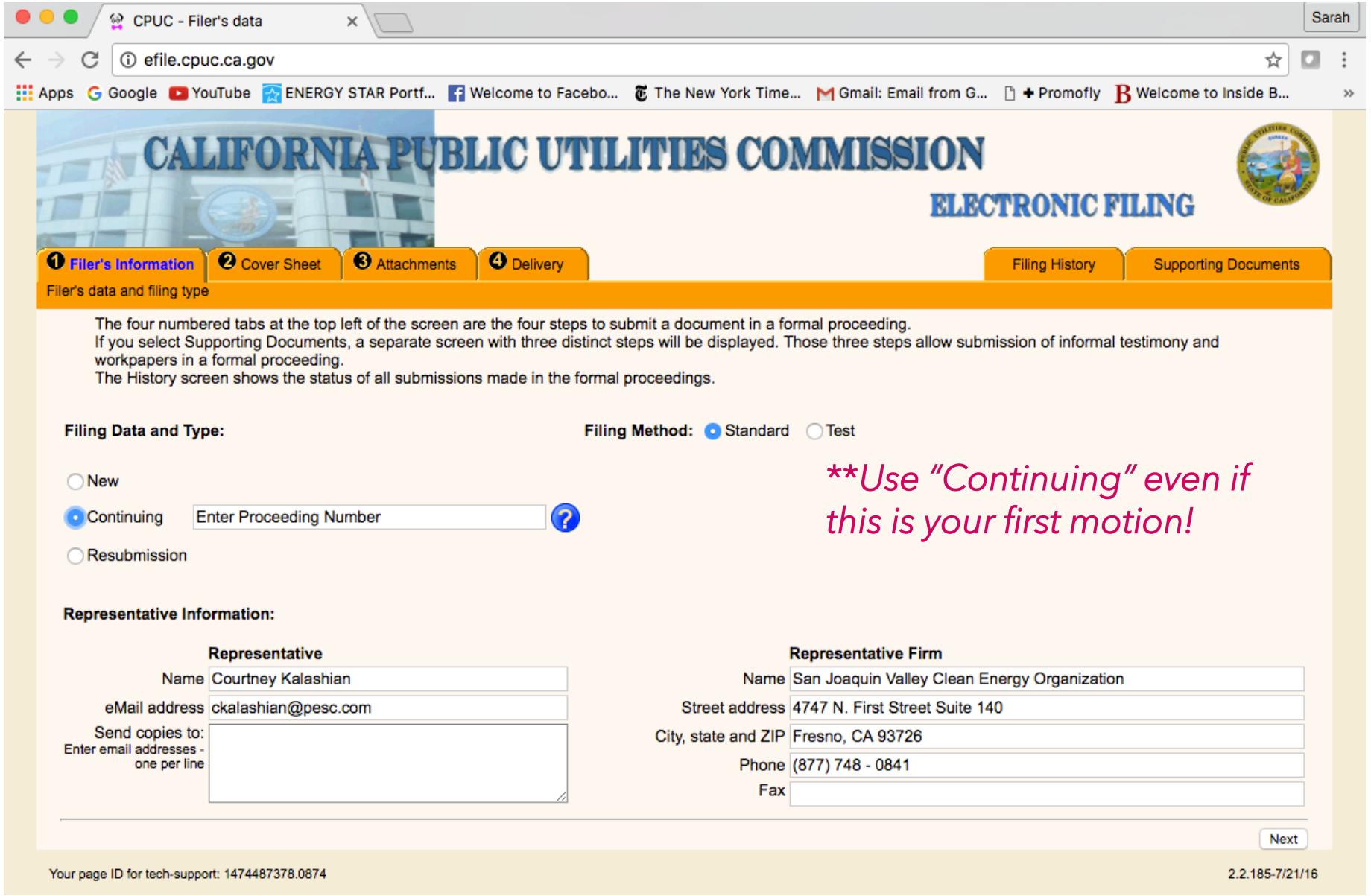
+ CPUC highly recommends using

  ADOBE ACROBAT PROFESSIONAL

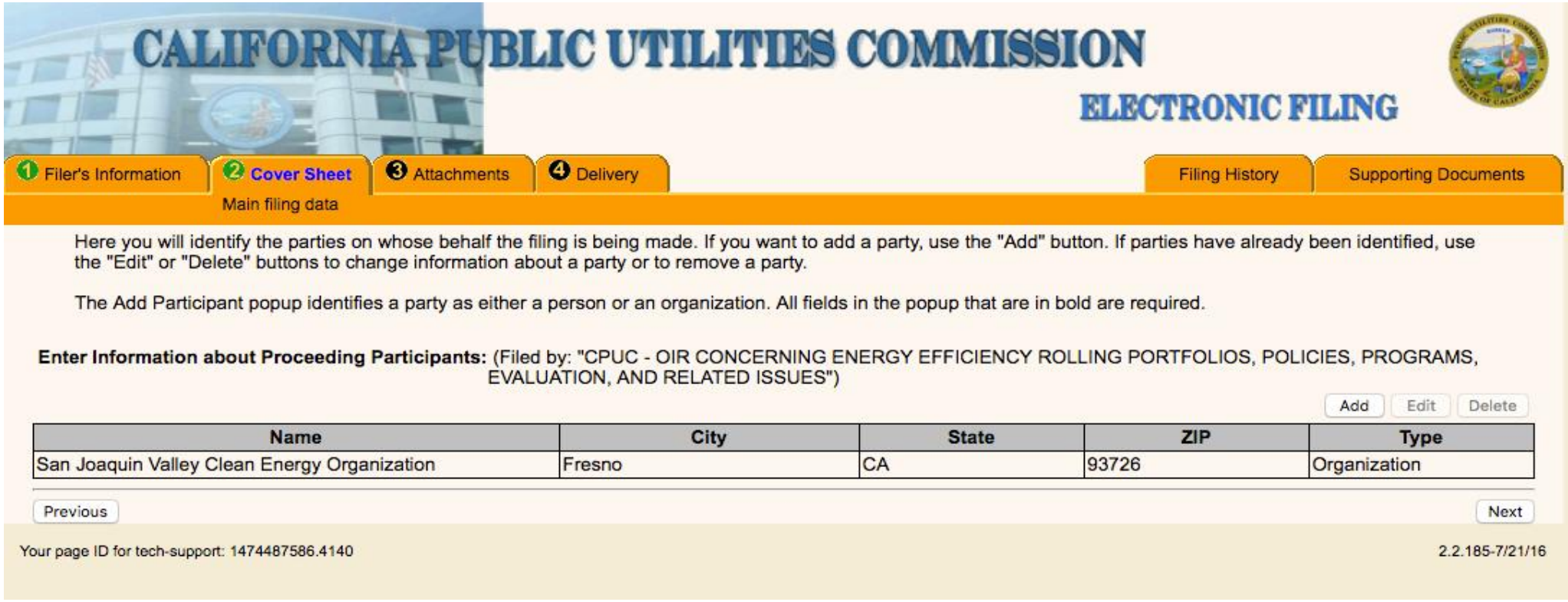
Submitting Your Motion at efile.cpuc.ca.gov

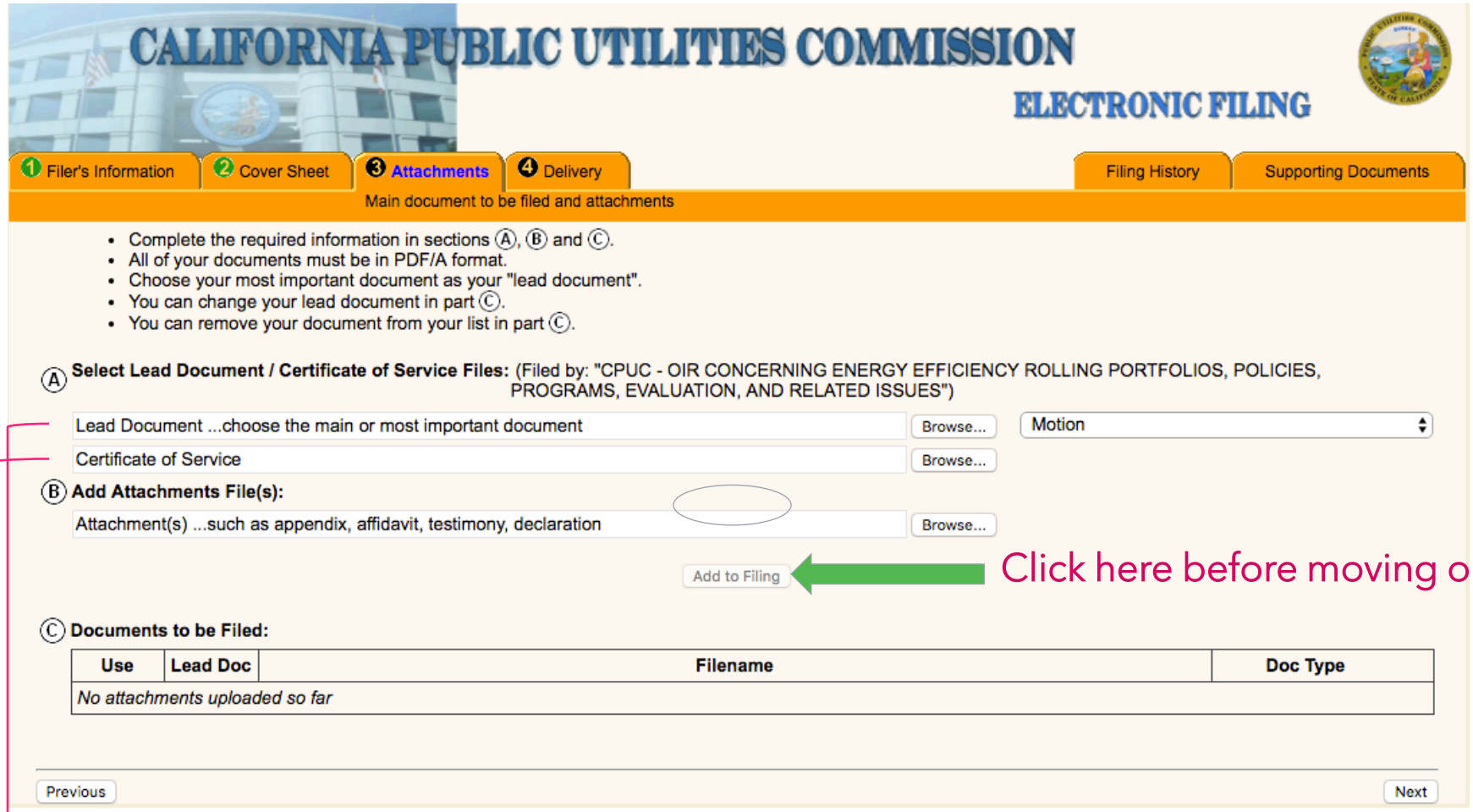


Haven't done this before? Register first!
Otherwise just type in your email to get started.


CPUC - Filer's data
Sarah
efile.cpuc.ca.gov
Apps
Google
YouTube
ENERGY STAR Portf...
Welcome to Facebo...
The New York Time...
Gmail: Email from G...
Promofly
Welcome to Inside B...
CALIFORNIA PUBLIC UTILITIES COMMISSION
ELECTRONIC FILING
1 Filer's Information
2 Cover Sheet
3 Attachments
4 Delivery
Filing History
Supporting Documents
Filer's data and filing type
The four numbered tabs at the top left of the screen are the four steps to submit a document in a formal proceeding.
If you select Supporting Documents, a separate screen with three distinct steps will be displayed. Those three steps allow submission of informal testimony and workpapers in a formal proceeding.
The History screen shows the status of all submissions made in the formal proceedings.
Filing Data and Type:
Filing Method: Standard Test
New
Continuing
Enter Proceeding Number
Resubmission
**Use "Continuing" even if this is your first motion!
Representative Information:
Representative
Name Courtney Kalashian
eMail address ckalashian@pesc.com
Send copies to:
Enter email addresses - one per line
Representative Firm
Name San Joaquin Valley Clean Energy Organization
Street address 4747 N. First Street Suite 140
City, state and ZIP Fresno, CA 93726
Phone (877) 748 - 0841
Fax
Next
Your page ID for tech-support: 1474487378.0874
2.2.185-7/21/16

Unless you are submitting documentation on behalf of yourself, always fill out the "Organization" form for adding participants.


CALIFORNIA PUBLIC UTILITIES COMMISSION
ELECTRONIC FILING
1 Filer's Information
2 Cover Sheet
3 Attachments
4 Delivery
Filing History
Supporting Documents
Main filing data
Here you will identify the parties on whose behalf the filing is being made. If you want to add a party, use the "Add" button. If parties have already been identified, use the "Edit" or "Delete" buttons to change information about a party or to remove a party.
The Add Participant popup identifies a party as either a person or an organization. All fields in the popup that are in bold are required.
Enter Information about Proceeding Participants: (Filed by: "CPUC - OIR CONCERNING ENERGY EFFICIENCY ROLLING PORTFOLIOS, POLICIES, PROGRAMS, EVALUATION, AND RELATED ISSUES")
Add
Edit
Delete
Name
City
State
ZIP
Type
San Joaquin Valley Clean Energy Organization
Fresno
CA
93726
Organization
Previous
Next
Your page ID for tech-support: 1474487586.4140
2.2.185-7/21/16

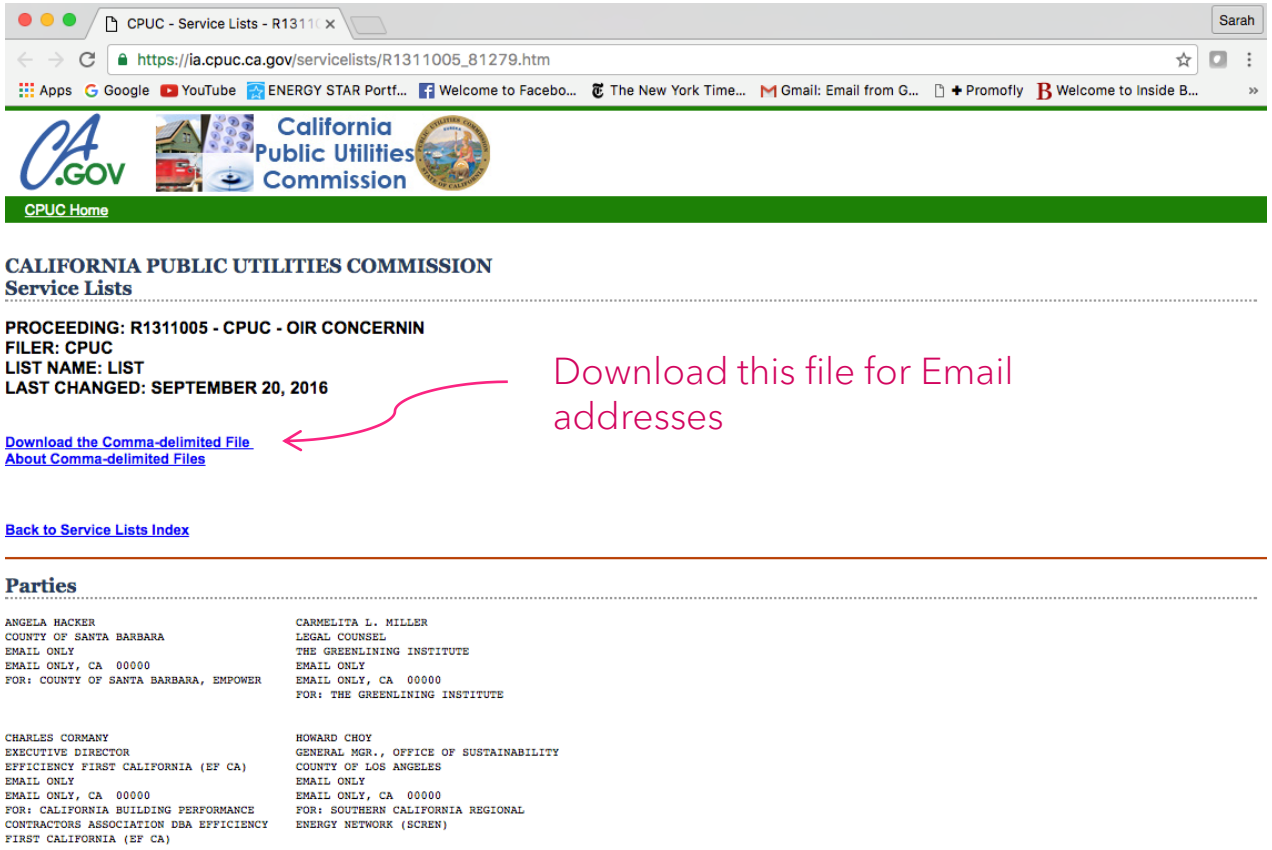


Click here before moving on!!

Upload Motion for Party Status here

Upload Certificate of Service document here

Now What?



Download this file for Email addresses

1. Email to service list
   a. Copy all email addresses from spreadsheet into new email.
   b. Attach PDF copy of Motion document and Certificate of Service and send.

Deadlines and Resubmissions

- Deadlines are decided by the assigned Administrative Law Judge
- If a motion or comment is rejected, it may be rectified and resubmitted multiple times if necessary
- Date on the resubmission of documents will be unchanged

Assistance from CPUC Officials

Docket Office

California Public Utilities Commission

505 Van Ness Avenue, Room 2001

San Francisco, CA 94102

Phone: (415) 703-2121

Party Status Yes/No

If Yes

You are now eligible to file formal comments

The filing procedure for formal comments is identical to filing for party status

If No

CPUC will provide an email detailing reasons why your submittal was rejected and how to correct and resubmit

For clarifications, call CPUC Docket Office or specific CPUC official assigned to your proceeding

Resources

Maria Kelly, CPUC

📋 CPUC Proceeding Information

📬 Subscription Service

🗓️ Daily Calendar / Upcoming Events

🤝 Public Advisor's Office

📍 Regional Liaisons

Connect with your local CPUC contact

CPUC Regional Liaisons

Maria Kelly, CPUC

Region	Region Contact	Email
Northern CA Counties	Jesus Torres	jesus.torres@cpuc.ca.gov
Central Valley	Heather Iwamuro	heather.iwamuro@cpuc.ca.gov
Los Angeles	Nora Gutierrez	nora.gutierrez@cpuc.ca.gov
Bay Area, Sacramento, San Joaquin	Maria Kelly	maria.kelly@cpuc.ca.gov
Orange, San Bernardino, Riverside Counties	Hope Christman	hope.christman@cpuc.ca.gov
Central Coast	Chris Moore	christopher.moore@cpuc.ca.gov
San Diego and Imperial Counties	Jesus Torres	jesus.torres@cpuc.ca.gov

+ 2025-all-staff-map.pdf
+ CPUC Local Government and Community Affairs

Kazoo Check #3

+ Will you get involved with the CPUC?

Now, back to the party!

Keep the Party Going

Aisha Cervantes-Cissna, SDCP

🎺 Quick check: Are you a member of...

+ LGSEC (Local Government Sustainable Energy Coalition)?
+ CEDMC (California Efficiency + Demand Management Council)?+

Next Steps

+ Join up with LGSEC + CEDMC

Figure out if you're served by a CCA

+ Meet with your city council/supervisor rep
+ Apply to the CCA Community Advisory Committee
+ Contact CCA policy staff

Thanks for coming to our party

Rochelle Butler, SJVCEO, rbutler@sjvceo.com

Aisha Cervantes-Cissna, SDCP, acissna@sdcommunitypower.org

Maria Kelly, CPUC, Maria.Kelly@cpuc.ca.gov