August 1, 2018

**Advice No. #[x]-E-G**

(CPUC Identification #)

Public Utilities Commission of the State of California

**SUBJECT: JOINT COOPERATION MEMORANDUM OF REGIONAL NETWORK, AND INVESTOR OWNED UTILITY(IES)**

**Purpose**

[To be drafted.]

**Background**

[To be drafted.]

**Discussion**

[To be drafted.]

**Protests**

Anyone may protest this Advice Letter. The protest must state the grounds upon which it is based. The protest must be made in writing and received by the Commission within 20 days of the date this Advice Letter was filed with the Commission, or [DATE]. There is no restriction on who may file a protest. The address for mailing or delivering a protest to the Commission is:

Public Utilities Commission

CPUC Energy Division

Attention: Tariff Unit

505 Van Ness Avenue

San Francisco, CA 94102

Copies of the protest should also be sent via e-mail to the attention of the Energy Division at EDTariffUnit@cpuc.ca.gov. It is also requested that a copy of the protest be sent by email to addresses shown below on the same date it is mailed or delivered to the Commission.

|  |  |
| --- | --- |
| Contact Information of filers |  |

**Effective Date**

Per D.18-05-041 this Advice Letter is subject to Energy Division disposition and should be classified as Tier 2 (effective after staff approval) pursuant to General Order (GO) 96-B. The [filers] respectfully requests that this Advice Letter be made effective on August 31, 2018 which is 30 calendar days after the date filed.

**Notice**

A copy of this Advice Letter is being sent to the Commission’s service lists for A.17-01-013 (et al.) and R.13-11-005. For changes to A.17-01-013 (et al.) and R.13-11-005 service lists, please contact the Commission’s Process Office at 415-703-2021 or by electronic mail at process\_office@cpuc.ca.gov.

 Respectfully Submitted,

 *\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*

Contact Information of filers

**Attachment A**

[REN], [IOU] and if needed [IOU 2] Joint Cooperation Memo

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1. **[REN NAME] 2019 PORTFOLIO OVERVIEW**

(Summary of Portfolio ~ brief narrative)

Table 1: Table showing net savings forecast for each PA towards each sector (res, comm, industrial,ag, public, C&S, other cross cutting), and total across all sectors, for the 2019 program year.

**Table 2. [REN NAME] Summary of resource programs**

|  |  |  |
| --- | --- | --- |
| Program Unique ID or Sector  | Annual Budget | Cost Effectiveness |
|  | ADMIN | **DINI** | **INCENTIVES** | **Marketing** | **TRC** | **PAC** |
| Resource Programs |
|  |  |  |  |  |  |  |
| Sub-Total Resource |  |  |  |  |  |  |
| Non-Resource Programs |
|  |  |  |  |  |  |  |
| Sub-Total non-Resource |  |  |  |  |  |  |
| Total |  |  |  |  |  |  |

1. **SUMMARY OF [REN NAME] PROGRAMS OFFERED FOR 2019**

**Resource programs**

A. REN PROGRAM Unique ID

 -Summary of program objectives

 -Budget of program

 -Target sector and audience

 -Eligible measures

 B. REN PROGRAM Unique ID

 -Summary of program objectives

 -Budget of program

 -Target sector and audience

 -Eligible measures

 Non-Resource Programs

 C. REN PROGRAM Unique ID

 -Summary of program objectives

 -Budget of program

 -Target sector and audience

 -Eligible measures

**III. SUMMARY OF [IOU(s)] PROGRAMS WHICH POTENTIALLY OVERLAP WITH [REN NAME] PROGRAM OFFERINGS IN 2019**

A. *The intent of this summary in section III is for PAs to first show the similarities between a pair or set of IOU-REN programs such that the pair/set of programs was identified for this list before showing differences between programs that makes the program compliant in section IV:Program compliance.* Describe (in table or narrative, it is up to discretion of PAs how to structure content in this section, with) how each set of program is or could be perceived as overlapping. Consider relevant characteristics of programs when identifying “overlap” including, but not limited to: program design, eligible measures and target audience.

1. **[REN NAME] PROGRAM COMPLIANCE WITH D.12-11-015**

A. [REN NAME] PROGRAMS CURRENTLY NOT OFFERED BY IOU PARTNERS

(brief narrative describing the “gaps” identified and being fulfilled by REN’s by program)

B**.** [REN NAME] PILOTS ACTIVITIES WHERE THERE IS NO CURRENT UTILITY PROGRAM, AND WHERE THERE IS A POTENTIAL FOR SCALABILITY TO A BROADER GEOGRAPHIC REACH, IF SUCESSFUL

(brief narrative describing the “gaps” identified and being fulfilled by REN’s by program and potential for scalability)

C. [REN NAME] PILOTS THAT TARGET HARD TO REACH CUSTOMERS

 (brief narrative describing the how REN’s programs are targeting hard to reach customers)

**Table [3]. [REN NAME] [Sector] D. 12-11-015 Compliance, by program**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Check D.12-11-015 Threshold Criteria that apply for each program | To be distinguished from  | 1. Activities that utilities cannot or do not intend to undertake.   | 2. Pilot activities where there is no current offering, and where there is potential for scalability to a broader geographic reach, if successful.  | 3. Pilot activities in hard to reach markets, whether or not there is a current utility program that may overlap.  |
| [REN PROGRAM Unique ID] | [IOU Program Unique ID] | (succinct and brief strategies described here) |  |  |
| [REN PROGRAM Unique ID] | [IOU Program Unique ID] |  |  |  |
| [REN PROGRAM Unique ID] | [IOU Program Unique ID] |  |  |  |

**Table [4]. [REN NAME] [Sector] D. 12-11-015 Compliance, by program**

**Table [5]. [REN NAME] [Sector] D. 12-11-015 Compliance, by program**

**V. [REN NAME] AND [PARTNER IOU(s)] PORTFOLIO COORDINATION ON PROGRAMS WITH OVERLAP**

Describe additional efforts that the REN and IOU are taking to improve portfolio coordination to reduce overlap, including: changes to program or measures, offering programs in different service territories, etc.

**APPENDIX A [IOU(s)] 2019 PORTFOLIO OVERVIEW**

(See Section I for guidance. What is required from the REN in Section II is also required from the Partner IOU(s) for the programs IOUs offer in the REN service area)

**APPENDIX B [IOU(s)] PORTFOLIO SUMMARY OF PROGRAMS OFFERED FOR 2019**

(See Section II for guidance. What is required from the REN in Section II is also required from the Partner IOU(s) for the programs IOUs offer in the REN service area)