

From: Roscow, Steve

Sent: 6/30/2010 10:45:47 AM

To: Redacted

Weisz, Dawn (dweisz@marinenergyauthority.org)

Cc: Cherry, Brian K (/O=PG&E/OU=CORPORATE/CN=RECIPIENTS/CN=BKC7);

Redacted

Redacted

; Horner, Trina (/O=PG&E/OU=CORPORATE/CN=RECIPIENTS/CN=TNHC); Fitch, Julie A. (julie.fitch@cpuc.ca.gov); Clanon, Paul (paul.clanon@cpuc.ca.gov); Velasquez, Carlos A. (carlos.velasquez@cpuc.ca.gov); Kahlon, Gurbux (gurbux.kahlon@cpuc.ca.gov)

Bcc:

Subject: RE: Draft Advice Letter for Opt Out Information

PG&E folks,

This is still not responsive to my request.

The problem that I asked you to solve is the following: Marin wishes to "verify the validity of customer opt-outs" (the quoted text is from an earlier e-mail sent by Calvin, so it has been clear from the start that PG&E understands what MEA is looking for here).

I asked PG&E in an e-mail sent Thu 6/3/2010 4:50 PM to "suggest a specific solution". Tying this issue to Rule 23.J.2 isn't a solution. Please provide us with a workable means for Marin to "verify the validity of customer opt-outs", quickly, not dependent on future tariff changes and CPUC resolutions.

Thanks again,

Steve Roscow

CPUC Energy Division

415-703-1189

From: Redacted

**Sent:** Tuesday, June 29, 2010 2:52 PM  
**To:** Weisz, Dawn  
**Cc:** [Redacted]; Roscow, Steve  
**Subject:** RE: Draft Advice Letter for Opt Out Information

Hi Dawn,

Thank you for your response to our proposal to address the confidentiality concerns that currently prevents PG&E from providing customer specific information for those customers opting out of CCA prior to the mass enrollment. Our proposed simple revision to Rule 23.J.2 would, upon CPUC approval, enable PG&E to provide the data that MEA currently seeks. This proposal was modeled after a similar arrangement we made with the City and County of San Francisco in the execution of our CCA Service Agreement with them. As we discussed on the phone prior to sending you the draft Advice Letter, we believe this language would allow PG&E to provide MEA (and any other CCA) with the opt-out information that is currently barred by the existing tariff language.

Your response suggests that there is already sufficient provisions in our tariffs to provide all opt out information. In reviewing the tariff references you cite below, we do not believe they are applicable to this issue as noted:

*Rule 23 B.2.c: Timeliness and Due Diligence*

*“Consistent with State law and Commission decisions, PG&E shall exercise due diligence in meeting its obligations and deadlines under this Rule”*

**PG&E: This is a general reference to meeting deadlines associated with various tasks identified in the tariff, e.g. switching timelines, providing meter data, payment timeline, etc. Meeting our obligations to the current language in this tariff is precisely why we are unable to provide customer information until it is changed.**

*Rule 23 C.b: “When a customer is enrolled in to CCA Service, the customer’s account information will be sent to the CCA. Such information will include information such as metering information required for billing, settlement and other functions”*

**PG&E: Yes, customer information is sent to the CCA upon mass enrollment of that customer onto CCA Service. The information MEA is seeking is for those customers that opted out of CCA, and therefore did not get mass enrolled. As such, this tariff provision does not apply to the issue at hand.**

*Rule 23 C.c: "A CCA has the option to request additional customer information pursuant to Schedule E-CCAINFO."*

***This provision allows a CCA to request additional info associated with its customers, not those that have opted out of CCA, and we have recently provided MEA with such additional information, e.g. tax percentage, # of dwelling units for multi-family units, medical baseline allotments, heat source designation, and horse power connected load. The opt-out information that MEA is seeking is sensitive in nature, and the current restriction in Rule 23.J.2 must first be removed before providing this information under Rule 23.C.3.c.***

***ELECTRIC SCHEDULE E-CCAINFO Sheet 3***

***INFORMATION RELEASE TO COMMUNITY CHOICE PROVIDERS:***

*4. Customer-specific information or aggregated information that violates the 15/15 Rule, as listed above will be provided when the CCA has met all of the following conditions:*

- a. Signed Non-Disclosure Agreement;*
- b. Executed an Attestation stating that the city or county is investigating, pursuing or implementing CCA, and*
- c. Any registration or other requirements as imposed by the CPUC.*

The signed Non-Disclosure Agreement referenced above, for customer specific data items, applies only to the current tariff items #16 and #17.

We believe that the current advice letter proposal we discussed with you best addresses the specific restriction on our ability to provide this information. Other potential options that we would be willing to discuss with you are:

- 1) Revisions to the E-CCAINFO tariff;
- 2) Amendment to the MEA Service Agreement; and
- 3) PG&E submits the data you seek directly to Energy Division for their review and verification

With the exception of the third option, the current proposal along with options one and two would still require approval by the CPUC in the form of a resolution before this data could be released by PG&E. We are happy to discuss any of these options with you further.

We are also willing to consider specific changes you may want to propose to the draft text amending Rule 23 we sent to you. Please let us know your preference among these alternatives. Thank you.

Best,

Redac

Redacted

Manager, Core Gas Aggregation Program  
Energy Solutions and Service  
Pacific Gas and Electric Company

Redacted

**From:** Weisz, Dawn [mailto:dweisz@marinenergyauthority.org]  
**Sent:** Wednesday, June 23, 2010 3:02 PM  
**To:** Redacted  
**Cc:** Redacted  
**Subject:** RE: Draft Advice Letter for Opt Out Information

Hi Redact

We really appreciate the time you took to brief us on the draft advice letter and for sending it our way. In reviewing it, we could not find any provisions that address our request for customer data showing when and how customers opted out. Instead, the draft letter addresses a different set of issues, most of which are actually not applicable any more, given recent CPUC decisions.

The proposed tariff language would also seek to impose reporting obligations on a CCA. While we appreciate you reaching out to us and while we would like to partner with you on this effort, MEA cannot support this advice letter as currently drafted.

As we mentioned previously, the request for customer date and method of opt out should already be provided under your existing tariff language as specified in Rule 23 as follows:

*Rule 23 B.2.c: Timeliness and Due Diligence*

*“Consistent with State law and Commission decisions, PG&E shall exercise due diligence in meeting its obligations and deadlines under this Rule”*

*Rule 23 C.b: “When a customer is enrolled in to CCA Service, the customer’s account information will be sent to the CCA. Such information will include information such as metering information required for billing, settlement and other functions”*

*Rule 23 C.c: “A CCA has the option to request additional customer information pursuant to Schedule E-CCAINFO.”*

***ELECTRIC SCHEDULE E-CCAINFO Sheet 3***

***INFORMATION RELEASE TO COMMUNITY CHOICE PROVIDERS:***

*4. Customer-specific information or aggregated information that violates the 15/15 Rule, as listed above will be provided when the CCA has met all of the following conditions:*

- a. Signed Non-Disclosure Agreement.*
- b. Executed an Attestation stating that the city or county is investigating, pursuing or implementing CCA, and*
- c. Any registration or other requirements as imposed by the CPUC.*

MEA has met all of the conditions (4a, b and c) above. Here is a direct link to the information on your website: [http://www.pge.com/tariffs/tm2/pdf/ELEC\\_SCHEDS\\_E-CCAINFO.pdf](http://www.pge.com/tariffs/tm2/pdf/ELEC_SCHEDS_E-CCAINFO.pdf) We suggest that the customer confidentiality concerns raised by PG&E may be more directly addressed through a clarifying letter from the CPUC Energy Division. Longer term, a revision to the CCA-INFO tariff, stating that PG&E will provide opt-out information requested by the CCA once the CCA has executed a non-disclosure agreement, may be appropriate as well. Please let us know if you have any questions or need further clarification on this issue.

We expect that this information (customer opt out date and method) can be provided to us by the end of the week.

Again, thank you for your time and effort in sharing this draft letter with us. We look forward to hearing from you soon.

Thanks,

Dawn

**From:** [Redacted]  
**Sent:** Monday, June 21, 2010 4:29 PM  
**To:** Weisz, Dawn; John Dalessi; Kirby Dusel  
**Cc:** [Redacted]  
**Subject:** Draft Advice Letter for Opt Out Information

Hi Dawn,

Attached is the draft Advice Letter and Tariff change that we plan to file with the CPUC in order to provide CCAs with customer opt-out information prior to the mass enrollment date. Let us know if you have any feedback before we finalize our Advice Letter.

If you have any additional questions, feel free to contact Redacted

Thanks,

Redacted

Redacted | Manager - **ESP Services**

Pacific Gas & Electric Company

Redacted