

From: Paulo, Lisa  
Sent: 7/15/2010 11:08:15 AM  
To: Ramaiya, Shilpa R (/o=PG&E/ou=Corporate/cn=Recipients/cn=SRRd)  
Cc: Zelmar, Karen (/O=PG&E/OU=Corporate/cn=Recipients/cn=KJZ1); Caron, Jennifer (jennifer.caron@cpuc.ca.gov); [Redacted]  
Bcc:  
Subject: RE: 3 IDSM items- feedback needed

Ok. I know that folks in attendance will be interested in hearing about audit tool development that meets the tool criteria identified in "attachment C" vs. development of an interim tool (as described in D.09-09-047). Will you all be able to provide an update with these distinctions in mind?

**From:** Ramaiya, Shilpa R [mailto:SRRd@pge.com]  
**Sent:** Thursday, July 15, 2010 10:34 AM  
**To:** Paulo, Lisa  
**Cc:** Caron, Jennifer; [Redacted] Zelmar, Karen  
**Subject:** Re: 3 IDSM items- feedback needed

Lisa,

It is just a status update; no decision needed from you. We though we'd be proactive on letting you know what we're up to.

Thanks  
Shilpa

**From:** Paulo, Lisa <lisa.paulo@cpuc.ca.gov>  
**To:** Ramaiya, Shilpa R  
**Cc:** Caron, Jennifer <jennifer.caron@cpuc.ca.gov>; [Redacted] Zelmar, Karen  
**Sent:** Thu Jul 15 09:55:58 2010  
**Subject:** RE: 3 IDSM items- feedback needed

Thanks Shilpa. What is the specific objective of the meeting tomorrow regarding audits?

Lisa

**From:** Ramaiya, Shilpa R [mailto:SRRd@pge.com]  
**Sent:** Thursday, July 15, 2010 7:35 AM  
**To:** Paulo, Lisa  
**Cc:** Caron, Jennifer; [Redacted]; Zelmar, Karen  
**Subject:** RE: 3 IDSM items- feedback needed

Morning Lisa,

The conversation with Jeanne and Simon was part of our montly ED/IOU management call. It was merely an update about why they wouldn't see the other IOUs on Friday. No particular discussion was had regarding audits.

As far as the presentation, the other IOUs have seen drafts. We'll be sharing the final presentation with you as well as the other IOUs tomorrow.

Let us know if you have any other questions.

Shilpa

**From:** Paulo, Lisa [mailto:lisa.paulo@cpuc.ca.gov]  
**Sent:** Thursday, July 15, 2010 7:26 AM  
**To:** Ramaiya, Shilpa R  
**Cc:** Caron, Jennifer  
**Subject:** RE: 3 IDSM items- feedback needed

Hi Shilpa-

Please provide a little more detail about the meeting you had on Tuesday with Jeanne and Simon. How was it related to IDSM and the audit tool development? Also, please provide the slides you have already submitted. Jen and I need to keep up on all the moving pieces. I had

meant to ask you if there was a particular agenda or more detailed description you want to achieve for the meeting on Friday.

Lisa Paulo

**From:** Ramaiya, Shilpa R [mailto:SRRd@pge.com]  
**Sent:** Thursday, July 15, 2010 5:25 AM  
**To:** Caron, Jennifer; Paulo, Lisa; [Redacted]  
**Cc:** Athena Besa; michelle.thomas@sce.com; Mark.S.Martinez@sce.com; Edwin.Hornquist@sce.com; Zelman, Karen; Gary.Suzuki@sce.com; Gofman, Genrick  
**Subject:** RE: 3 IDSM items- feedback needed

Jennifer,

Per a discussion with Simon and Jeanne this past Tuesday, SCE and Sempra will be updating the CPUC on their progress at a later date regarding audits. They've seen the presentation PG&E has and have been coordinating on business requirements and scope. We've invited them to attend, but they felt it would be duplicative since they have already received the information that will be shared on Friday. It makes sense, especially since we are all so stretched for time these days.

A call-in number does not seem to be necessary.

Thanks.

Shilpa

**From:** Caron, Jennifer [mailto:jennifer.caron@cpuc.ca.gov]  
**Sent:** Wednesday, July 14, 2010 6:13 PM  
**To:** Paulo, Lisa; [Redacted]  
**Cc:** Athena Besa; michelle.thomas@sce.com; Mark.S.Martinez@sce.com; Ramaiya, Shilpa R; Edwin.Hornquist@sce.com; Zelman, Karen; Gary.Suzuki@sce.com; [Redacted]  
**Subject:** 3 IDSM items- feedback needed

Hi Everyone,

Emerging Technologies: Let us know the status of the draft for the ET Roadmap. It was going to be provided on June 30th according to an action item from our April 21st meeting. In addition to Edwin, I have these folks listed as contacts for ET: Paul, [Paul.Delaney@sce.com](mailto:Paul.Delaney@sce.com); [Redacted] and Abdullah, [AAhmed1@semprautilities.com](mailto:AAhmed1@semprautilities.com). Are they also working on the roadmap?

Audits: Shilpa, did all of the appropriate staff from the other IOUs get invited to the audit meeting that PG&E set up for this Friday from 11:30- 12:30? Please let us know if folks from SCE and SDG&E will be calling in ASAP, because we have to set up a conference line. Athena, is anyone else from SDG&E working on integrated audits?

Meetings: Did we agree to quarterly meetings with the IOU Task Force and ED? If so, that puts our next meeting in September, but Lisa and I would like to set up monthly meetings for July and August since there are so many things going on right now. Conference calls with the core IOU group are fine. If it is convenient for Lisa and I to join your already scheduled calls that's fine, otherwise I will schedule and coordinate meetings from our end.

Thanks for your time!

Jennifer

**From:** Paulo, Lisa  
**Sent:** Wednesday, July 14, 2010 3:13 PM  
**To:** [Redacted]  
**Cc:** Caron, Jennifer; Athena Besa; [Mark.S.Martinez@sce.com](mailto:Mark.S.Martinez@sce.com); [michelle.thomas@sce.com](mailto:michelle.thomas@sce.com); [kjz1@pge.com](mailto:kjz1@pge.com); Christine Tomeo  
**Subject:** RE: Integration Task Force Templates for Review

What is the status of submitting this initial report (see below)? We are going on two weeks beyond the first report date.

Lisa Paulo

**From:** [Redacted]  
**Sent:** Thursday, July 08, 2010 3:34 PM

**To:** Paulo, Lisa  
**Cc:** Caron, Jennifer; Athena Besa; Mark.S.Martinez@sce.com; michelle.thomas@sce.com; kjz1@pge.com; Christine Tomeo  
**Subject:** Re: Integration Task Force Templates for Review

Lisa, we had not heard back from anyone until now. We are reviewing the report, but we have held off on submitting anything pending your response. We will discuss this as a team and get back to you.

Sent via BlackBerry from T-Mobile

**From:** "Paulo, Lisa" <lisa.paulo@cpuc.ca.gov>

**Date:** Thu, 8 Jul 2010 15:01:02 -0700

**To:** Redacted

**Cc:** Caron, Jennifer<jennifer.caron@cpuc.ca.gov>; Besa, Athena<ABesa@semprautilities.com>; <Mark.S.Martinez@sce.com>; <michelle.thomas@sce.com>; <kjz1@pge.com>; Redacted

**Subject:** RE: Integration Task Force Templates for Review

Hi Elizabeth –

I am not sure that anyone got back to you yet. For this first round please submit the report via e-mail and cc everyone on this list. Since we are about a week behind, please forward this ASAP.

Thanks.

Lisa Paulo

Energy Division

California Public Utilities Commission

E-Mail: [LP1@cpuc.ca.gov](mailto:LP1@cpuc.ca.gov)

Phone: 415-355-5495

**From:** Elizabeth Lowe [Redacted]  
**Sent:** Thursday, June 17, 2010 11:33 AM  
**To:** Paulo, Lisa  
**Cc:** Constantine, Sachu; Caron, Jennifer; 'Besa, Athena'; Mark.S.Martinez@sce.com; michelle.thomas@sce.com; kjz1@pge.com; [Redacted]  
**Subject:** RE: Integration Task Force Templates for Review

Lisa and Jenn – thanks for your time last week discussing the templates. We have discussed the reporting process and requirements internally and with the SW IDSM team and agree that we need to have more discussion on the Excel workbook template. Given the timing, people’s availability, the reporting requirements discussion that is currently underway, but our desire to submit something this month, we plan to submit a Statewide document consistent with the agreed upon Word template that addresses each of the 8 tasks.

Let’s then plan a meeting in July to discuss the workbook once we have more feedback from the reporting requirements discussion.

Can you please let me know how we should submit this report? Do you want this via email? Do you want it through a data request? Please let us know.

Thanks for your continued support!

Elizabeth T. Lowe

Barakat Consulting

925-997-4104

**From:** Paulo, Lisa [mailto:lisa.paulo@cpuc.ca.gov]  
**Sent:** Wednesday, May 26, 2010 4:14 PM  
**To:** Elizabeth Lowe  
**Cc:** Constantine, Sachu; Caron, Jennifer; Besa, Athena; Mark.S.Martinez@sce.com; michelle.thomas@sce.com; kjz1@pge.com; [Redacted]  
**Subject:** RE: Integration Task Force Templates for Review

I have reserved a conf call # and a conf room at the PUC between 1:30 and 3:00 p.m. if we would like to use it for the meeting on June 10<sup>th</sup>.

As far as having a conf call on 6/9<sup>th</sup> I am available either between 9:00 to 10:00 a.m., 11:00 – noon, and after 4:00 p.m.

Lisa Paulo

**From:** Elizabeth Lowe [Redacted]  
**Sent:** Tuesday, May 25, 2010 10:44 PM  
**To:** Paulo, Lisa  
**Cc:** Constantine, Sachu; Caron, Jennifer; 'Besa, Athena'; Mark.S.Martinez@sce.com; michelle.thomas@sce.com; kjz1@pge.com; [Redacted]  
**Subject:** Integration Task Force Templates for Review

Lisa, Sach and Jennifer:

Per our discussion at the April 21<sup>st</sup> meeting and the end of May deadline for these items, we attach two draft templates for review and discussion:

1. A Template for Reporting Quarterly Updates and Accomplishments of the Task Force based on the

Eight Directives

2. A Workbook for tracking integrated projects, pilots, activities and marketing efforts of the utilities

We want to make sure we are set to have a **meeting on June 10<sup>th</sup>** of the full SW IDSM Task Force in person / conference call from 1:30-3 p.m. to go over the status of each of the Eight Directives. We can agree to an agenda at a later date.

Next, I will put on the calendar a “core team” discussion every 3<sup>rd</sup> Wednesday of the Month from 12-1, but maybe since we missed May, we can have our discussion on June 9<sup>th</sup> prior to the June 10<sup>th</sup> meeting. Let me know what you think.

We look forward to continuing to work with you on this effort.

Elizabeth T. Lowe

Barakat Consulting

925-997-4104