

From: Cherry, Brian K  
Sent: 11/29/2010 3:22:58 PM  
To: Lindh, Frank (frank.lindh@cpuc.ca.gov); Fitch, Julie A. (julie.fitch@cpuc.ca.gov);  
Clanon, Paul (paul.clanon@cpuc.ca.gov); [Redacted]  
[Redacted]; 'Roscow, Steve'  
(steve.roscow@cpuc.ca.gov)  
Cc: Jacobson, Erik B (RegRel) (/O=PG&E/OU=Corporate/cn=Recipients/cn=EBJ1);  
Warner, Christopher (Law) (/O=PG&E/OU=Corporate/cn=Recipients/cn=CJW5);  
Velasquez, Carlos A. (carlos.velasquez@cpuc.ca.gov)  
Bcc:  
Subject: RE: Item 355 | Explanation of BPP Calculation for MEA | Follow-up

Send me a note identifying the facts.

**From:** Roscow, Steve [mailto:steve.roscow@cpuc.ca.gov]  
**Sent:** Monday, November 29, 2010 3:19 PM  
**To:** Cherry, Brian K; [Redacted] Clanon, Paul; Lindh, Frank; Fitch, Julie A.  
**Cc:** Velasquez, Carlos A.; Warner, Christopher (Law); Jacobson, Erik B (RegRel)  
**Subject:** RE: Item 355 | Explanation of BPP Calculation for MEA | Follow-up

Brian, thank you, I will certainly let you know.

What steps will you take if I identify any issues for you?

**From:** Cherry, Brian K [mailto:BKC7@pge.com]  
**Sent:** Monday, November 29, 2010 2:49 PM  
**To:** Roscow, Steve; [Redacted] Clanon, Paul; Lindh, Frank; Fitch, Julie A.  
**Cc:** Velasquez, Carlos A.; Warner, Christopher (Law); Jacobson, Erik B (RegRel)  
**Subject:** RE: Item 355 | Explanation of BPP Calculation for MEA | Follow-up

Steve - PG&E is not engaged in any efforts to undermine Marin. If you hear differently, please let me know.

**From:** Roscow, Steve [mailto:steve.roscow@cpuc.ca.gov]  
**Sent:** Monday, November 29, 2010 1:58 PM  
**To:** [Redacted]  
**Cc:** Velasquez, Carlos A.; Warner, Christopher (Law); Jacobson, Erik B (RegRel); Cherry, Brian K  
**Subject:** RE: Item 355 | Explanation of BPP Calculation for MEA | Follow-up

[Redacted],

First, thanks, I will pass Chris's name and contact info on to our Legal folks.

Second, I have to disagree with your suggested approach on the opt-out issues, based on what I saw in Dawn's note this morning. I do not want that topic to either (1) become a new time-sink for me and Carlos or Marin or PG&E, or (2) drag out while we resolve it. The legislative report you reference is due at the end of January, 2 months from now—we can't wait for 2 months to resolve things like this. And regarding the new or relocating customers, no further clarity is needed. The Commission was clear in Res E-4250 that, while the applicable tariff rule needed to be modified, "... we are of the view that customers who are unaware of the terms and conditions of the CCA service should be informed of those terms and conditions before being given the opportunity to opt out." Those terms and conditions need to come from Marin, not PG&E, right?

Finally, it looks like you dropped Brian from your note, so I am adding him back. I am very concerned that PG&E is continuing its efforts to undermine Marin, even after, as I understand it, Peter Darbee and Chris Johns personally told President Peevey that those efforts would stop.

Brian, could you please clarify?

Steve Roscow

CPUC Energy Division

415-703-1189

**From:** [Redacted]  
**Sent:** Monday, November 29, 2010 1:36 PM  
**To:** Roscow, Steve  
**Cc:** Velasquez, Carlos A.; Warner, Christopher (Law); Jacobson, Erik B (RegRel)  
**Subject:** RE: Item 355 | Explanation of BPP Calculation for MEA | Follow-up

Hi Steve:

No worries! Hope you had a good Thanksgiving.

Chris Warner, who you had copied, is the supporting attorney on CCA issues.

Incidentally, Dawn had sent a couple of e-mails related to opt-out issues. Specifically, the process for handling new customers and those wanting to return to bundled service outside of the formal CCA enrollment period. We don't think there is clarity on these issues. As such, it may be worth including in the upcoming assessment that will be part of the CPUC report.

regards,

**Redacted**

PG&E | Energy Solutions & Service

**Redacted**

**From:** Roscow, Steve [mailto:steve.roscow@cpuc.ca.gov]

**Sent:** Monday, November 29, 2010 12:56 PM

**To:** **Redacted**

**Cc:** Velasquez, Carlos A.; Warner, Christopher (Law); Cherry, Brian K; Jacobson, Erik B (RegRel)

**Subject:** RE: Item 355 | Explanation of BPP Calculation for MEA | Follow-up

H **Redacted**

Sorry this is taking so long—the holidays, and end-of-year Commission crunch, are slowing things down at our end.

Just regarding item #2 below, the CPUC privacy rule, could you provide the proper contact in PG&E's law department? We will pass that on to our legal folks and the attorneys can talk to each other.

Thanks again--

Steve Roscow

CPUC Energy Division

415-703-1189

**From:** [Redacted]  
**Sent:** Monday, November 15, 2010 8:32 PM  
**To:** Roscow, Steve  
**Cc:** Velasquez, Carlos A.; Warner, Christopher (Law); Cherry, Brian K; Jacobson, Erik B (RegRel)  
**Subject:** RE: Item 355 | Explanation of BPP Calculation for MEA | Follow-up

Hi Steve:

I provide responses below to your e-mail. If you have any questions feel free to contact Erik or myself.

Thanks,

[Redacted]

[Redacted]

### 1. Recalculation for BPP:

Attached is the recalculation worksheet (suffix 090310) for the impacted customers. Also, attached is a template (Calculation tool) that was the basis for the recalculation. The person who prepared the recalculation is based in our billing center in Stockton. Potentially, I can have her join us on a call if you have questions.

### 2. CPUC privacy Rule

PG&E Electric Rule 9.M and CPUC Decision No. 90-12-121 prohibit PG&E from releasing an electric customer's confidential information, including financial information, to a third party without the customer's consent. On a related note, I believe Erik was going to follow-up with you later this week on a "proposed solution" for sharing confidential information.

### 3. Reporting Structure

My reporting structure is listed below:

My Manager:

His Manager:

Our Director: Jess Brown

Our Sr. Director: Felecia Lokey

Our V.P. Steve Malnight

Our SVP: Helen Burt (Tom Bottorff is currently acting for Helen Burt)

Please note that many of the interactions with MCE and their back-office administrator (Nobel Americas formerly Sempra) go through different departments within my organization (Customer CARE) as well as outside of my organization. For example, the bill presentment changes that we are working on are primarily being implemented by our IT organization. Ongoing issues with data transfer (EDI) and billing are handled broadly within the Meter to Cash area, which is within my organization but overseen by a different V.P. Consequently, a direct reporting structure up from me doesn't necessarily provide insight

into how issues are addressed since they pan across Customer Care and other organizations.

**From:** Roscow, Steve [mailto:steve.roscow@cpuc.ca.gov]  
**Sent:** Monday, November 15, 2010 5:12 PM  
**To:** [Redacted]  
**Cc:** Velasquez, Carlos A.; Warner, Christopher (Law); Cherry, Brian K  
**Subject:** RE: Item 355 | Explanation of BPP Calculation for MEA

Hi [Redacted],

Just following up on my request for an "org chart", in particular, as well as the first 2 substantive questions. Copying Brian this time.

Thanks again--

Steve

**From:** Roscow, Steve  
**Sent:** Friday, November 12, 2010 4:03 PM  
**To:** [Redacted]  
**Cc:** Velasquez, Carlos A.; Warner, Christopher (Law)  
**Subject:** RE: Item 355 | Explanation of BPP Calculation for MEA

Hi [Redacted],

My apologies for this dragging out.

If you could send over a recalculation spreadsheet for us to look at, that would be great.

And, could you tell us specifically what "CPUC privacy rules" prevent PG&E from providing this information directly to MEA?

Finally, I need to catch up and better understand who exactly at PG&E is working with Marin at this time, and who they report to up the management chain: so, could you tell us who you report to directly, and who that person reports to, and so on, all the way up to Senior VP? (Trina Horner has provided us with copies of Org charts in the past, but just a simple list with individual names and titles would be great)

Thanks!

Steve R

**From:** Redacted  
**Sent:** Monday, November 01, 2010 5:03 PM  
**To:** Roscow, Steve  
**Cc:** Velasquez, Carlos A.; Warner, Christopher (Law)  
**Subject:** Item 355 | Explanation of BPP Calculation for MEA

Steve:

Per my VM, here is an earlier e-mail regarding the Balanced Payment Plan (BPP) issue. The e-mail below provides a general description of how the BPP is applied to MEA customers. Also, we can provide the recalculation worksheet to ED if requested. We are currently unable to provide such information directly to MEA since it contains customer specific information that is protected under the CPUC's privacy rules.

Redacted  
PG&E | Energy Solutions & Service

Redacted

---

**From:** Redacted  
**Sent:** Wednesday, October 27, 2010 2:26 PM  
**To:** 'Dawn Weisz'; (PSandro-Yepes@semprasolutions.com)  
**Cc:** 'Velasquez, Carlos A.'  
**Subject:** Item 355 | Explanation of BPP Calculation for MEA

Dawn and Pol:

Below is the explanation of the BPP calculation.

As previously indicated, we are happy to provide the recalculation worksheet to the Energy Division for verification.

Thanks,

Redacted

**For Marin BPP customers the BPP amount is manually calculated to just include the transmission and distribution charges (T&D). The T&D charges are estimated by territory and tier charges using the customer's average usage of the last 12 months plus any outstanding payoff amount. Once the customer has 12 months of T&D charges solely on the account, the system will be able to perform as it should and automatically calculate the BPP amount during the routine review period, which is at every 4<sup>th</sup> month mark from the BPP Last Changed Date.**

**Bundled customers who previously joined MEA were removed from BPP when they left PG&E. To address this a systems service request will go into effect at the end of October to ensure that customers are not removed from BPP. However, the calculation of the BPP (w/o the generation portion) will still have to occur manually because the system was designed for fully bundled customers.**