

From: [Redacted]
Sent: 11/16/2010 11:17:04 AM
To: 'Roscow, Steve' (steve.roscow@cpuc.ca.gov)
Cc: Jacobson, Erik B (RegRel) (/O=PG&E/OU=Corporate/cn=Recipients/cn=EBJ1)
Bcc:
Subject: RE: Item 355 | Explanation of BPP Calculation for MEA | Follow-up

Thanks for clarifying on your side!

Certainly, let Erik and myself know and we'll round up folks as needed.

[Redacted]

From: Roscow, Steve [mailto:steve.roscow@cpuc.ca.gov]
Sent: Tuesday, November 16, 2010 10:53 AM
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

[Redacted] thank you for the info.

I may have more questions about the org chart, but your note helps. (and I should tell you, at our end, I "supervise" a section that includes 2 analysts who work on departing load issues: Carlos on CCA, and Kathryn Auriemma on DA; my direct boss is Gurbux Kahlon (Program Manager), her direct boss is Julie Fitch (Director of Energy Division), and Julie answers to many "bosses", including Paul Clanon (CPUC Executive Director). At least we have a "flatter" org than PG&E ☺)

More importantly, the reason for the questions is that in light of the recent Leno hearing, I am looking to schedule a follow-up meeting with Marin and PG&E later this week, and I want to invite the right folks from PG&E. So I'll be back in touch soon about that.

Steve

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

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: [Redacted]

His Manager: [Redacted]

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 4th 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.