

From: Paulo, Lisa
Sent: 6/15/2011 10:15:25 AM
To: Ramaiya, Shilpa R (/o=PG&E/ou=Corporate/cn=Recipients/cn=SRRd)
Cc: Seager, Jonathan (/O=PG&E/OU=Corporate/cn=Recipients/cn=J7Se); Baker, Simon (simon.baker@cpuc.ca.gov); Franzese, Peter (peter.franzese@cpuc.ca.gov)
Bcc:
Subject: RE: PG+E concerns with Proposed IDSM Research Plan

Hi Shilpa-

I am now back in the office and plan to touch base with Peter Franzese, ED lead on the EM&V side regarding the concerns briefly described below. We will get back to you this week as far as availability for a meeting. In the meantime, please send PG&E staff availability, to discuss this via conference call.

Lisa

From: Ramaiya, Shilpa R [mailto:SRRd@pge.com]
Sent: Tuesday, June 14, 2011 11:42 AM
To: Paulo, Lisa
Cc: Seager, Jonathan
Subject: FW: PG+E concerns with Proposed IDSM Research Plan

Lisa,

Welcome back. Just checking on your and Simon's availability for a brief conversation per the below?

Thanks.

Shilpa

415-973-3186

From: Ramaiya, Shilpa R
Sent: Tuesday, June 07, 2011 4:29 PM
To: 'Baker, Simon'
Cc: Seager, Jonathan; 'Paulo, Lisa'
Subject: RE: PG+E concerns with Proposed IDSM Research Plan

It looks like Lisa is out of the office all of this week. We'll await her response when she returns from vacation on Monday to schedule a quick touchbase.

Shilpa

From: Ramaiya, Shilpa R
Sent: Tuesday, June 07, 2011 4:28 PM
To: 'Baker, Simon'
Cc: Seager, Jonathan; Paulo, Lisa
Subject: RE: PG+E concerns with Proposed IDSM Research Plan

Simon,

We'd like to talk through the process so our effort and the process is efficient. We see some parts of the research plan as duplicative and not useful, and want to see if we are misunderstanding ED's purpose and efforts for the plan, in general.

This should not last more than 15 minutes.

Thanks again.

Lisa – are you available Friday at 8:30?

Shilpa

From: Baker, Simon [mailto:simon.baker@cpuc.ca.gov]
Sent: Tuesday, June 07, 2011 4:21 PM
To: Ramaiya, Shilpa R
Cc: Seager, Jonathan; Paulo, Lisa
Subject: Re: PG+E concerns with Proposed IDSM Research Plan

Shilpa,

Can you please describe your concerns, so we can look into them in advance of the meeting? Lisa Paulo is out today, but she is our staff lead on the planning side for IDSM. I could meet Fri 8:30AM, if it is ripe for discussion with the right people (i.e. Lisa) available to participate.

Best,
Simon

From: Ramaiya, Shilpa R [mailto:SRRd@pge.com]
Sent: Tuesday, June 07, 2011 03:32 PM
To: Baker, Simon
Cc: Seager, Jonathan <J7Se@pge.com>
Subject: FW: Proposed IDSM Research Plan

Simon,

Do you have a few minutes for us to speak with you about the IDSM research plan below? We have some concerns we'd like to talk through with you.

Are you available Thursday from 10-10:30 or Friday from 8:30-9:30?

Thanks.

Shilpa

From: [Redacted]
Sent: Wednesday, June 01, 2011 5:29 PM
To: [Redacted] 'Shelton, Jean'; 'Paulo, Lisa'; 'Franzese, Peter'
Cc: 'Torok, Christina'; 'Guild, Renee'; 'Christine Tomeo'; Valerie.Richardson@kema.com; [Redacted]
[Redacted] Michelle.Thomas@sce.com; Carol.Yin@sce.com; Mark.S.Martinez@sce.com; 'Gettig, Brenda';
'Kaufman, Kurt'; 'Besa, Athena'; [Redacted]
Subject: RE: Proposed IDSM Research Plan

Jean and Lisa:

On behalf of PG&E, SCE and Sempra IDSM Task Force members, attached is a redlined version of the proposed IDSM Research Plan that includes comments from each of the IOUs, some consolidated and some more fragmented. Our general observations and suggestions are below:

1. In general, we think that we should keep the scope of this process evaluation focused on looking at enhancing and improving the process of the IDSM statewide program only and not dealing with ALL integrated activities. That way we do not have to get into the weeds of each of the programs and this will help us be a more effective Task Force.
2. This could be considered a two part evaluation. We need to phase this as the first step dealing with the task force activities (the Eight Tasks,) then perhaps later look at how these activities of the task force are meeting the IDSM metrics
3. We are concerned that there is substantial duplication of efforts – with the Cost-Effectiveness whitepaper, identifying Best Efforts, development of the reporting process, etc, so we have suggested eliminating or repurposing some sections of the research.
- 4. Generally, we have significant feedback on overall scope and direction, so we suggest having a call later this week or early next week to discuss our comments.**

Thank you for your consideration of our recommendations. We look forward an ongoing collaborative process and to following up with you via phone or in person next week. Thanks. -etl

Redacted

Barakat Consulting

Redacted

From: Redacted

Sent: Tuesday, May 31, 2011 4:25 PM

To: 'Shelton, Jean'; 'Paulo, Lisa'; 'Franzese, Peter'

Cc: 'Torok, Christina'; 'Guild, Renee'; 'Christine Tomeo'; 'Valerie.Richardson@kema.com'; Redacted

Redacted 'Michelle.Thomas@sce.com'; 'Carol.Yin@sce.com'; 'Mark.S.Martinez@sce.com'; 'Gettig, Brenda'; 'Kaufman, Kurt'; 'Besa, Athena'

Subject: Proposed IDSM Research Plan

Jean and Lisa:

I just wanted to let you know that we have substantial feedback on the Proposed IDSM Research plan that we will be providing to you tomorrow. I wanted to give you a “heads up” due to the nature of the comments and so that we can make plans to further collaborate on the final plan.

1. We will be providing comments in the form of redline edits and comments identified in side margins
2. Overall, we are concerned about duplication of efforts – with the Cost-Effectiveness whitepaper, identifying Best Efforts, development of the reporting process, etc, so we have suggested eliminating or repurposing some sections of the research
3. We have identified opportunities for deeper dives. Instead of “what was done” – we suggest more focus on “what barriers exist internally and externally to prevent full integration”

We would like to propose meeting to discuss our comments in the near future so that we can share more of the context of our feedback and collaborate on the final plan and outcomes. We look forward to working with you on this effort.

Redacted

Barakat Consulting

Redacted

From: Shelton, Jean [mailto:Jean.Shelton@itron.com]

Sent: Tuesday, May 24, 2011 3:33 PM

To: Redacted 'Paulo, Lisa'; 'Franzese, Peter'

Cc: Torok, Christina; Guild, Renee; 'Christine Tomeo'; Valerie.Richardson@kema.com; Redacted

Redacted

Subject: RE: IDSM Task Force Meeting

Hi Redacted

I would be very interested in discussing what we have put together and finding out your opinion on both the research plan and the researchable questions.

During the last meeting we had with task force members they asked us to develop some researchable questions. Many, if not most, of the questions that have been developed, I see as items that would contribute to a PM survey.

I was hoping that you could pass along the attached draft research questions and draft research plan to the members of the task force. We will not have time to go into these in depth tomorrow, but

providing them with the documents, with a short introduction tomorrow, will facilitate a review and discussion of these elements at a later date.

Thanks,

Jean

From: [Redacted]
Sent: Tuesday, May 24, 2011 10:41 AM
To: Shelton, Jean; 'Paulo, Lisa'; 'Franzese, Peter'
Cc: Torok, Christina; Guild, Renee; 'Christine Tomeo'; Valerie.Richardson@kema.com; [Redacted]
[Redacted]
Subject: RE: IDSM Task Force Meeting

I can share this information with the IDSM Task Force. It's important that we keep to our agenda tomorrow even though the information you have provided could be the focus of another all day meeting. Since I have been consulting on many of these issues and am close to all the tracking, I'd like to make sure we meet at some point. Many of the questions you are asking have been the focus of my work, so once again, I want to make sure we aren't duplicating efforts.

Thanks- [Redacted]

[Redacted]

Barakat Consulting

[Redacted]

From: Shelton, Jean [mailto:Jean.Shelton@itron.com]
Sent: Tuesday, May 24, 2011 8:01 AM
To: [Redacted] 'Paulo, Lisa'; 'Franzese, Peter'
Cc: Torok, Christina; Guild, Renee; 'Christine Tomeo'; Valerie.Richardson@kema.com
Subject: RE: IDSM Task Force Meeting

The plan and the questions are 6-10 page documents. I'm assuming that the PP deck is a power point presentation. I don't think that the plan or the set of questions is appropriate for a power point presentation.

I have attached the draft of these two documents. You can send them out to the participants. Let me know if you need something in addition.

Thanks,

Jean

From: [Redacted]
Sent: Monday, May 23, 2011 1:47 PM
To: 'Paulo, Lisa'; Shelton, Jean; 'Franzese, Peter'
Cc: Torok, Christina; Guild, Renee; 'Christine Tomeo'
Subject: RE: IDSM Task Force Meeting

I have set aside 30 minutes. Can we get the plan and questions for inclusion in the PP deck?

[Redacted]

Barakat Consulting

Redacted

From: Paulo, Lisa [mailto:lisa.paulo@cpuc.ca.gov]
Sent: Thursday, May 19, 2011 5:01 PM
To: Shelton, Jean; Franzese, Peter
Cc: Torok, Christina; Guild, Renee; Redacted Christine Tomeo
Subject: RE: IDSM Task Force Meeting

That would be a great idea. I am cc'ing Redacted I would like to carve out some time on the agenda for this. I think it would be very important.

Lisa

From: Shelton, Jean [mailto:Jean.Shelton@itron.com]
Sent: Thursday, May 19, 2011 4:35 PM
To: Paulo, Lisa; Franzese, Peter
Cc: Torok, Christina; Guild, Renee
Subject: IDSM Task Force Meeting

Lisa,

Thanks for the IDSM quarterly reports. I scanned through them and will look at them more carefully when I get back home.

You mentioned in your email that there is a Task Force meeting next Wednesday and asked if we would be there. Do you want us to present the draft research plan, the draft researchable questions, or just show up and participate?

Given that I'm in San Diego, I could participate via phone and Christie has offered to participate in person. We would like more information about the focus of the meeting.

Thanks,

Jean

Jean Shelton, Ph.D.

ltron

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