

From: Dietz, Sidney  
Sent: 11/9/2011 2:57:46 PM  
To: 'Tisdale, Matthew' (matthew.tisdale@cpuc.ca.gov)  
Cc:  
Bcc:  
Subject: Tisdale visit to PG&E's EE group

Matthew --

Yes, we're slow, I could tell you stories. Are you available to visit us to talk about what we're doing on EE on 14Dec from 1030a to 230p? At the bottom of this note is the team's draft agenda, feel free to make suggestions.

I hope you are well!

yours,

sid

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**From:** Dietz, Sidney  
**Sent:** Wednesday, November 09, 2011 2:27 PM  
**To:** Redacted  
**Cc:** Berman, Janice S; Corey, Jana  
**Subject:** RE: Commission Advisor Visit - next steps

13Dec does not work for me. 14Dec does, as does 15Dec in the afternoon, thought it's cutting it close for me and Matthew for the CPUC meeting. I think 14Dec is best. .

yours,

sid

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**From:** Redacted  
**Sent:** Wednesday, November 09, 2011 2:21 PM  
**To:** Dietz, Sidney  
**Cc:** Berman, Janice S; Corey, Jana  
**Subject:** RE: Commission Advisor Visit - next steps

Hi Sidney,

Jan will be in the office most of the week of Dec. 11 to host a visit with Matt Tisdale. I put the following holds on her calendar:

**December 13:** 8:00 AM-4:00 PM

**December 14:** 10:30 AM- 2:30 PM

**December 15:** 12:30-4:30 PM

December 13 would be preferable. Please let me know which four-hour block works best, and we can go from there to propose times to Matt Tisdale.

Thank you,

Redacted

CONT Sr. Director's Assistant  
to Jan Berman and Jana Corey

Redacted



Before printing this email or any attachments,  
please think about our collective responsibility for the environment.

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**From:** Berman, Janice S  
**Sent:** Tuesday, November 08, 2011 7:16 PM  
**To:** Redacted Corey, Jana  
**Subject:** RE: Commission Advisor Visit - next steps

Jana and I talked about this. I suggested that we pin down a date with Tisdale, Sid, and our team that will work for all of us... This is not an easy feat. Once we have the date, we can develop the agenda. I think Jana has a good start, but the specifics may change as some of the original ideas may be outdated by the time the visit is arranged.

--Jan

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**From:** Redacted  
**Sent:** Wednesday, November 02, 2011 3:18 PM  
**To:** Berman, Janice S  
**Cc:** Redacted  
**Subject:** FW: Commission Advisor Visit - next steps

Jan,

Jana asked me to follow up with you to see if the agenda she proposed below has been approved.

Redacted

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**From:** Corey, Jana  
**Sent:** Thursday, October 27, 2011 2:30 PM  
**To:** Malnight, Steven; Zambrano, Saul; Lokey, Felecia K  
**Cc:** Berman, Janice S; Olsen, Jenna  
**Subject:** FW: Commission Advisor Visit - next steps

Steve, Saul, Felecia,

I understand that you would like to host Matt Tisdale here, and do a deeper dive with him on our organization. Jan, Jenna and I brainstormed some ideas (bottom of the email), and from that I crafted a proposed agenda. Sid seems comfortable with our approach. I would appreciate any input you have, and would also like your approval of the resources involved. This would require Saul, Felecia, and Jan preparing and leading 30 minute sessions; Jan offered to host the ART session, and we would need a SPARC lead. I can have someone from my team run logistics.

\*\*\*\*\*

10am - 2pm

Proposed agenda:

- Organizational Overview - Steve, Saul, Felecia, Jan, Jenna (15-20 minutes)
- ART Tool - Jan, John, Roozbeh, Lynn Galal, Eunice B (45 minutes)
- SPARC Process Description with 2-3 sample presentations (consider Whole House, LED, Appliance Strategy, door gasket sunset) (30-45 minutes) (lead?)
- Working Lunch
- Product Deep Dive (Saul and team) - perhaps highlighting Retailer Partnerships, etc. (30 minutes)
- Customer Engagement Deep Dive (Felecia and team) - perhaps highlighting integrated SMB plan (PDP/EE/DR) (30 minutes)
- Policy, and Integrated Planning (Jan and team) - perhaps discussing the landscape for regulatory/legislative items upcoming and key discussion issues (30 minutes)
- Closing - Steve, Jan and Jenna (10 minutes)

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Please advise.

Jana

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**From:** Dietz, Sidney  
**Sent:** Thursday, October 27, 2011 1:59 PM  
**To:** Corey, Jana  
**Cc:** Olsen, Jenna; Berman, Janice S  
**Subject:** RE: Commission Advisor Visit - next steps

Jana --

Your agenda seems good to me. And I agree completely that we should bring Tisdale in on his own first. Can you give me dates that work for this, I can see there are a lot of people involved. I could also ask Tisdale, but I am sure we are more constrained than we are.

yours,

sid

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**From:** Corey, Jana  
**Sent:** Wednesday, October 26, 2011 10:18 AM  
**To:** Dietz, Sidney  
**Cc:** Olsen, Jenna; Berman, Janice S  
**Subject:** FW: Commission Advisor Visit - next steps

Sid, Any feedback on this approach? I think we will invite Matt Tisdale first, see how it goes, then ask Ferron's advisors in for a similar event. Let me know if you think this is on point, or if you have suggested additions or changes. Thanks, Jana

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**From:** Corey, Jana  
**Sent:** Tuesday, October 25, 2011 4:40 PM  
**To:** Berman, Janice S; Olsen, Jenna  
**Cc:** Redacted  
**Subject:** Commission Advisor Visit - next steps

Jan and Jenna,

If you think we generally have the right idea below, perhaps an email to Steve, Saul, and Felecia requesting their support would be the next step? Then Roenna can approach the advisors for a date/time?

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10am - 2pm

Proposed agenda:

- Organizational Overview - Steve, Saul, Felecia, Jan, Jenna (15-20 minutes)
- ART Tool - Jan, John, Roozbeh, Lynn Galal, Eunice B (45 minutes)
- SPARC Process Description with 2-3 sample presentations (consider Whole House, LED, Appliance Strategy, door gasket sunset) (30-45 minutes) (lead?)
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- Policy, and Integrated Planning (Jan and team) - perhaps discussing the landscape for regulatory/legislative items upcoming and key discussion issues (30 minutes)
- Closing - Steve, Jan and Jenna (10 minutes)

Jana