

From: Cherry, Brian K  
Sent: 2/24/2014 9:23:40 AM  
To: carla.peterman@cpuc.ca.gov (carla.peterman@cpuc.ca.gov)  
Cc:  
Bcc:  
Subject: FW: THIS IS CORRECT COPY: recap: gift reporting for 7/23 PEVC conf

Carla – I received this on Friday. Looks like we screwed up on this one. We will report it as a gift if that is ok with you.

**From:** Redacted  
**Sent:** Friday, February 21, 2014 4:49 PM  
**To:** Bedwell, Ed  
**Cc:** Redacted  
**Subject:** recap: gift reporting for 7/23 PEVC conf

Ed:

We discovered this week that gift reports that were timely submitted for the 7/23/2013 Plug-in Electric Vehicle Collaborative meeting held at Hyatt Regency were not processed. The meeting was co-sponsored by PG&E and the Natural Resources Defense Council. The employee responsible for handling gift reporting misfiled the reports that were received in her inbox while she was out on a series of vacations. To be clear, Customer Energy Solutions appears to have done everything right -- including seeking prior legal guidance and submitting gift reports within 10 days following the event. We are waiting to receive the final attendance list to be sure they captured all public officials.

We will need to amend PG&E's Q3 2013 CA Lobby Report where gifts to California state officials are disclosed. Its not unusual for filers to make amendments to lobby reports when inadvertent mistakes are found. Given the voluntary nature of our amendment and the relatively small amount of gifts involved, fines are very uncommon under these circumstances.

We became aware of this issue when CPUC Commissioner Carla Peterman requested the gift amount for her annual Statement of Economic Interests filing (Form 700). Commissioner's reports are due March 3. CPUC employees will likely file April 1. When the event was first

vetted, Peterman was the only CUPC official on the RSVP list. But four additional CPUC employees showed up and participated on the day of the event: 1) Damon Franz, Supervisor – Emerging Procurement Strategies; 2) Jennifer Kalafut, Energy Advisor; 3) Adam Langton, Energy Analyst; and 4) Noel Crisostomo m Energy Analyst.

We've spent the last two days reconfirming all event information is accurate. After reviewing the final bill from the Hyatt, the pro-rata value for the food and beverages was lowered from \$152.43 to \$125.31 as the higher amount included room rental charges which did not need to be included. Approximately 15 gift letters are now being sent out to public officials that attended the meeting. The letter advises recipients that they can reimburse, but is not asking for reimbursement. Hard copies of letters to only the 5 CPUC officials mentioned above were sent via US Mail today. Melinda will also send electronic copies first thing Monday morning using their direct email addresses. I've attached a copy of one of the letters for your convenience.

Note the \$125.31 is well within California's \$440 calendar year limit. My understanding is the CPUC has its own internal policy of \$15/day, \$30/month and \$360/yr gift limits. They may opt to reimburse and CPUC policy permits reimbursement within a "reasonable time."

Please let me know if you need any additional information.

Redacted