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ATTACHMENTS 1-6

INTERVENOR COMPENSATION CLAIM OF SMALL BUSINESS UTILITY
ADVOCATES AND DECISION ON INTERVENOR COMPENSATION CLAIM
OF SMALL BUSINESS UTILITY ADVOCATES

Attachment 1

**Time Recordkeeping
Small Business Utility Advocates
James Birkelund**

<u>Issue Identification</u>	
Issue A	Customer Service and Outreach to Small Businesses
Issue B	Contracting Opportunities for Small Businesses
Issue C	Other Issues (economic development, tracking of small business customers, etc.)
Issue D	Settlement
Issue E	General (coordination, procedural issues)

Hours of James Birkelund:

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
4/28/15	Tcw S. Frank re coordination of small business issue in next GRC; analyze prior CPUC decisions with memorandums of understanding and other settlement techniques.				0.8		0.8
4/29/15	Tcw ALJ Steven Kotz re compensation claim for 2014 General Rate Case (GRC) Phase 1; review the same; draft correction ltr for filing at PUC. (1.2 hours; no charge.)						0
5/4/15	Review PG&E's small business plans relative to the current GRC on wide range of issues, including services, contracts, outreach, etc.	0.5	0.4	0.4			1.3
5/4/15	Analyze and outline small business (SB) interests that apply to 2017 GRC; research related to utility costs for small businesses as a percentage of revenue.	0.5	0.4	0.5			1.4

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
5/6/15	Tcw S. Frank re SB issues and settlement call.				0.1		0.1
5/7/15	Revise small business issues for settlement discussions related to education and outreach, contracting opportunities, and new initiatives for small businesses.	0.5	0.2	0.1			0.8
5/11/15	Emails w SBUA expert M. Brown re issues in 2017 GRC I; revise list of issues for settlement discussions w PG&E; emails w S. Frank re the same.	0.1	0.1	0.1	0.1		0.4
5/21/15	Strategy call w SBUA expert re negotiations w PG&E and possibility of entering early settlement agmt.				0.4		0.4
5/21/15	Prepare for and attend settlement call w PG&E re customer service, contracting opportunities, and other interests of small commercial customers.	1	0.4	0.4			1.8
6/5/15	Tcw S. Frank at PG&E and emails w SBUA expert re next steps and meetings for settlement negotiations.				0.4		0.4
6/6/15	Emails PG&E re settlement call.				0.1		0.1
6/9/15	Review PG&E proposed term sheet; research small business issues re outreach and support, distributed energy, a dedicated webpage to serve SB, economic development ("ED"), tracking small business spend, White House Financing, and PG&E's relationship w Small Electric Generators.	2	0.5	1			3.5

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
6/11/15	Analyze and research PG&E's proposed initiatives related to improved customer service for small businesses, the small business White House Program, and improving contracting opportunities.	1	0.4				1.4
6/12/15	Revise PG&E / SBUA memorandum of understanding (MOU) w regard to contract opportunities; research PG&E's prior initiatives re the same.		0.6				0.6
6/14/15	Revise SBUA's version of MOU re improving customer service and outreach, providing new digital tools for small businesses, tracking systems, high-bill notifications, economic development incentives, and promoting contracting opportunities for small businesses.	1	0.5	0.5			2
6/15/15	Prepare for and attend settlement conference w S. Frank and M. Klotz at PG&E; discuss all SBUA's major SB issues.	1.2	0.6	0.7			2.5
6/15/15	Strategy conference w SBUA asst executive director (B. Marra) re MOU term sheet and SBUA's membership feedback; re vise term sheet re the same.	1.8					1.8
6/16/15	Draft proposed term sheet w regard to SB outreach, tracking SB and providing services, and SB webpage; email to PG&E re the same.	1.3		1.2			2.5
6/23/15	Prepare for and attend settlement call w S. Frank and PG&E; follow-up call w M. Brown re tracking of small businesses.	0.4		1			1.4

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
7/2/15	Email w PG&E (M. Klotz) re timing for settlement term sheet.				0.1		0.1
7/9/15	Review settlement proposals by M. Klotz re SB customer service.	0.4					0.4
7/10/15	Emails w M. Klotz re time deadlines.				0.1		0.1
7/14/15	Revise settlement agreement re customer service and outreach.	1.6					1.6
7/15/15	Emails PG&E re next steps for review by customer service team.	0.5					0.5
7/24/15	Research procurement incentives for SB; email S. Frank re the same.		1				1
7/24/15	Prepare for and attend settlement conference with PG&E (across all issues).	1	0.3	0.3			1.6
7/28/15	Emails w M. Brown re small business issues of CA Asian Chamber of Commerce.					0.1	0.1
7/28/15	Revise term sheet (across all issues); emails PG&E re the same.	0.5	0.2	0.3			1
7/29/15	Emails w PG&E re term sheet; revise the same re spending on outreach and contracts w small businesses.	0.6	0.6				1.2
7/30/15	Emails PG&E (M. Klotz) re settlement term sheet; revise the same; emails M. Brown re the same.	1	0.2	0.6			1.8
7/31/15	Emails w PG&E re term sheet.				0.1		0.1
8/10/15	Emails w PG&E re final MOU.				0.2		0.2
8/11/15	Emails w S. Frank re California Asian Chamber of Commerce and coordinating SB concerns in PG&E's 2017 GRC; tcw M. Brown re the same.					0.5	0.5
8/11/15	Review PUC rules and procedures re adoption of MOU and settlements.				0.4		0.4

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
8/11/15	Revise and finalize comments MOU re all issues; tcw S. Frank and M. Klotz re the same.	2	0.8	1.2			4
8/13/15	Emails w PG&E re final signatures; final review and signing of MOU.				0.6		0.6
9/1/15	Emails and tcw S. Frank re PG&E application.					0.3	0.3
9/3/15	Emails w S. Frank re GRC testimony.					0.1	0.1
10/2/15	Emails from ALJ re PHC.					0.1	0.1
10/8/15	Review PG&E 6 equations that make up revenue requirements in light of MOU issues.	0.1	0.1				0.2
10/9/15	Tcw SBUA expert re mtg w PG&E expert and strategy to support stlmt agmt.				0.4		0.4
10/13/15	Review ALJ's pre-hearing statement.					0.1	0.1
10/17/15	Analyze PG&E application re SBUA MOU, scheduling, and other issues; review ALJ's pre-hearing ruling.					1.2	1.2
10/20/15	Draft mt. for party status; analyze small business profiles in CA based on Small Business Administration reports.	0.3	0.3	0.2			0.8
10/22/15	Analyze supporting documentation and workpapers for PG&E's application re customer service and contracting for small businesses, including Chapters 2, 6, and 12; analyze the same re references to SBUA MOU.	2.6	0.7				3.3
10/25/15	Emails w S. Frank re meet and confer.				0.1		0.1
10/26/15	Prepare for initial conference (before pre-hearing conference) w PG&E and other interested parties; tcw paralegal re outline of SB issues for pre-hearing conference.				0.2		0.2

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
10/27/15	Prepare for and attend meet and confer w PG&E and other parties; analyze PG&E's response to protests and pre-hearing statements re SBUA MOU and other small business issues.	0.8	0.4	0.8			2
10/28/15	Review PG&E's PHC proposed handout to ALJ.					0.3	0.3
10/29/15	Prepare for and attend PHC to appear on behalf of SBUA and our issues in proceeding.	1	1.1	1.2			3.3
10/29/15	Review small business issues from other parties in memo from SBUA paralegal (A. Macaux).			0.7			0.7
11/2/15	Emails w M. Klotz re SBUA/PG&E semi-annual meetings and future SB issues; revise memo notes re mtgs w PG&E on outreach and support and contracting opportunities.	0.3	0.1	0.1			0.5
11/24/15	Emails w SBUA expert re statement of issues in prehearing conference.			0.1			0.1
11/25/15	Strategy tcw and emails w SBUA expert re opening testimony.	0.8	0.2	0.1			1.1
12/1/15	Review ALJ scoping memo re scope of issues, including SBUA MOU, and deadlines for intervenor testimony.	0.1	0.1	0.1		0.1	0.4
12/15/15	Emails w TURN and ORA attorneys, respectively, re MOU w PG&E and small commercial customer interests.	0.1	0.1	0.1			0.3
12/17/15	Draft and send correspondence to TURN and ORA re PG&E / SBUA MOU to coordinate on any overlapping issues and inviting and soliciting feedback and concerns.					0.2	0.2

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
12/17/15	Emails w SBUA expert re small business issues raised by PG&E at October 23, 2015 meeting.			0.1			0.1
1/16/16	Review PG&E ORA discovery requests re settlements and third-party claims.				0.6		0.6
1/23/16	Review weekly PG&E update.					0.1	0.1
1/26/16	Review mt for party status of R. Hendrick's related to small business issues.			0.3			0.3
2/24/16	Emails w SBUA expert re expert report.	0.1	0.1	0.1			0.3
2/29/16	Emails w SBUA expert re direct testimony.	0.1	0.1				0.2
3/1/16	Emails w PG&E re next in-person mtg between SBUA and PG&E.	0.1	0.1	0.1			0.3
3/4/16	Review other parties' NOIs for small business issues and potential coordination.					0.2	0.2
3/15/16	Conference w and emails w SBUA Asst. Executive Director (B. Mara) re support for SBUA expert report testimony on outreach and education.	1.1					1.1
3/16/16	Conference w SBUA advocate (B. Marra) re outreach to small business interests in PG&E's territory.	0.3					0.3
3/21/16	Post-enforcement from GRC 2015 -- prepare for meeting w M. Klotz and PG&E; emails re agenda (0.4; no charge).						0
3/22/16	Emails w PG&E re annual meetings (0.2; no charge)						
3/29/16	Discuss w M. Klotz PG&E's strategies for implementing SB spend in the 2017 GRC rate cycle.	0.1					0.1

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
3/30/16	Draft SBUA expert report; analyze other parties' discovery requests (including TURN and NAAC) re small commercial customer interests and PG&E's responses re small business issues; analyze PG&E's responses to NAAC re contracts awarded to small businesses.	1.1	0.5	0.5			2.1
3/31/16	Emails w S. Frank re small business initiatives at PG&E and meetings with SBUA.			0.3			0.3
4/6/16	Strategy meeting with SBUA Asst. Exec. Director re outreach and education to small businesses in PG&E territory; edits to expert report re the same.	1.2					1.2
4/8/16	Tcw SBUA expert re strategy for drafting opening testimony.	0.4	0.1	0.3			0.8
4/8/16	Emails w ORA re extension; review ALJ's ruling on supporting documents and joint comparison exhibit; email w SBUA expert re the same.	0.1	0.1	0.1		0.4	0.7
4/11/16	Review and sign NDA agmt w PG&E; emails to PG&E re the same.					0.3	0.3
4/11/16	Tcw and emails w SBUA expert re strategy for opening comments and commenting on ORA expert reports, and SBUA's contributions to joint comparison exhibit (JCE).	0.7		0.6			1.3
4/12/16	Review ORA testimony; edit SBUA expert report re the same.	1.4	0.5				1.9

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
4/14/16	Draft and revise SBUA expert report; continue analyzing ORA testimony; review Commission D.14-08-032 re PUC's authorization of additional funding that impacts small commercial customers expenditures; analyze SBUA-PG&E MOU re funding categories to address in SBUA expert report.	1.4		1			2.4
4/15/16	Draft and revise SBUA expert report; analyze ORA spending recommendations that impact small commercial customers, including related to MWC IV and MWC FK; research related to utility costs for small businesses as a percentage of revenue.	1.2		1			2.2
4/18/16	Emails w SBUA expert re ORA findings on PG&E MWC-IV expenditures and past accounting in 2014.	0.3					0.3
4/18/16	Draft SBUA expert report w regard to importance of utilities as significant costs for small commercial customers; research statistics re the same; draft report w respect to high bill notifications and customer service for small businesses; review SBUA / PG&E MOU re the same.	2.1		1.6			3.7
4/20/16	Tcw SBUA expert re revisions to and scope of expert report, including financial concerns of ORA.	0.3	0.1	0.3			0.7
4/21/16	Emails w SBUA expert re finalizing opening testimony; emails w and tcw SBUA paralegal re the same.	0.3	0.3	0.3			0.9
4/22/16	Emails w PG&E re joint exhibit.					0.1	0.1

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
4/22/16	Emails w SBUA expert and PG&E re attachments to expert report and confidential information.			0.1			0.1
4/25/16	Emails and tcw PG&E re discovery responses and joint exhibit.	0.1	0.1				0.2
4/26/16	Tcw M. Klotz re concerns re prior spending on small business matters.	0.1					0.1
4/26/16	Draft and revise SBUA report w regard to areas of funding that are relevant to small commercial customers including MWC EZ, MWC FK, and MWC 2F.	0.4		0.4			0.8
4/26/16	Emails w SBUA paralegal re editing and filing SBUA expert report.					0.1	0.1
4/26/16	Discussions w SBUA expert re importance of focusing on interests of small commercial customers, limiting support for large sums of money that are not targeted to small businesses, and developing factual support that can be used to directly support the SBUA / PG&E MOU.	0.5	0.2	0.2			0.9
4/27/16	Review PG&E discovery response to SBUA's first data request, questions 1 and 2; analyze PG&E WP 2-26 for issues impacting small businesses.	0.2	0.2	0.2			0.6
4/27/16	Meeting w SBUA Asst. Exec. Director (B. Marra) re SBUA outreach and education, results of her research w members and other small commercial customers in PG&E's territory and concerns implicated in PG&E's current GRC, Phase 1; revise SBUA expert report re the same	2.8					2.8

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
4/27/16	Analyze SBUA expert report to ensure compliance with each major section of MOU and avoiding any inconsistent or conflicting provisions in SBUA's expert testimony; tcw M. Klotz re the same.	0.8	0.2	0.2			1.2
4/27/16	Emails w and tcw SBUA expert re revisions to opening testimony related to PG&E funding requests.	0.1	0.1	0.1			0.3
4/27/16	Draft and revise SBUA expert report re customer service and economic development proposals to assist small commercial customers; research re rate increases to small commercial customers in PG&E's next GRC Phase II and importance of using those funds to help small businesses.	2.1	0.4	0.4			2.9
4/28/16	Tcw M. Brown re changes to expert report based on compliance with MOU and conversations with PG&E.	0.2	0.1	0.1			0.4
4/28/16	Revise SBUA expert report based on discussions w PG&E's attorney re scope of MOU and financial issues raised by ORA; research re proposed rate increases on small commercial customers in PG&E's last GRC Phase 2, and revise report re the same.	1.6	1				2.6
4/29/16	Submit supporting documents electronically to CPUC website; review CPUC guidelines re the same. (0.4; no charge)						0
4/29/16	Final comments and edits to SBUA expert report.	1	0.5	0.7			2.2
4/29/16	As above.	1		0.5			1.5
4/30/16	Emails to SBUA expert re review of opening testimony and preparation for rebuttal testimony.			0.2			0.2

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
5/2/16	Analyze reply testimony of other parties for small business issues.	1.1	0.3	0.3			1.7
5/3/16	Emails w SBUA expert re analysis of opening testimony of TURN and other parties and strategy for reply testimony.			0.1			0.1
5/3/16	Draft SBUA's contributions to Joint Comparison Exhibit (JCE).	0.3	0.1	0.2			0.6
5/3/16	Review opening testimony of TURN and National Diversity Coalition and analyze issues that impact small commercial customers; analyze TURN's position on ED funds (MWC - FK), MWC 2F, and MWC EZ; research TURN's position on R.15-12-012 re informing small commercial customers re TOU/peak pricing.	0.8	0.1	0.3			1.2
5/4/16	Tcw SBUA expert re reply brief.			0.1			0.1
5/5/16	Draft SBUA contributions to JCE re MWC IV, MWC FK,	0.4	0.4				0.8
5/5/16	Emails w SBUA expert re reply brief.	0.1	0.1	0.1			0.3
5/6/16	Draft SBUA contributions to JCE.	0.6		0.6			1.2
5/13/16	Emails w SBUA advocate re TURN opening testimony and phone support for small businesses.	0.1					0.1
5/13/16	Emails w SBUA expert's importance of independent analysis and necessity of reply testimony.					0.2	0.2
5/31/16	Review rebuttal testimony filed by other intervenors, PG&E, and ORA re small commercial customer issues; analyze SSJID's testimony re SBUA's proposals on economic development	0.4		0.4			0.8

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
6/1/16	Tcw S. Frank re hearing and overlapping small business issues w ORA and TURN.	0.1	0.1	0.1			0.3
6/2/16	Review PG&E, ORA, and TURN request to delay hearings.					0.1	0.1
6/3/16	Review ALJ ruling on hearing schedule.					0.1	0.1
6/7/16	Prepare for and attend all-party call to discuss settlement; review Sempra stlmt as PG&E suggested template.				1.3		1.3
6/8/16	Emails w TURN and ORA re funding areas of MWCs of importance to SBUA.	0.1	0.1				0.2
6/8/16	Tcw SBUA expert re TURN and ORA settlement discussions, including MWC IV and economic development funds.	0.3		0.3			0.6
6/8/16	Tcw and emails S. Frank re MOU, settlement negotiations w ORA and TURN, and impacts to small commercial customers related to MWCs.	0.3		0.2			0.5
6/9/16	Emails w TURN re settlement conference call; emails w SSJID's attorneys re funding for economic development.			0.3			0.3
6/10/16	Emails and tcw B. Marra re TURN testimony and MWC IV support for education and outreach for small commercial customers.	0.4					0.4
6/10/16	Prepare for and attend settlement call w TURN re SBUA MOU issues of importance.	0.5	0.2	0.2	0.7		1.6
6/13/16	Analyze and review parties' positions in JCE.	0.1	0.1	0.1			0.3
6/13/16	Analyze ORA testimony re MWK IV and MWC FK; attend settlement call w ORA re small commercial customer interests.	0.3		0.3			0.6
6/15/16	Attend all-party settlement discussions w PG&E.				0.6		0.6

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
6/16/16	Review PG&E's email request to ALJ to postpone hearings.					0.1	0.1
6/16/16	Conference w SBUA Board re PG&E settlement and MOU.	0.4	0.2	0.4			1
6/17/16	Review ALJ email to PG&E and parties re extension of time and noticing of settlement conferences.					0.1	0.1
6/20/16	Review joint motion to extend hearing dates filed by PG&E, ORA, and TURN; review ALJ's emails re the same.					0.2	0.2
6/21/16	Review correspondence between ALJ Roscow and PG&E; review ALJ ruling postponing hearing-related deadlines; review A4NR reply to motion.					0.2	0.2
6/22/16	Emails w TURN re MWC IV settlement proposal.	0.4					0.4
6/23/16	Review Commissioner Picker's revised scoping memo.					0.1	0.1
6/23/16	Tcw SBUA expert re TURN and ORA settlement proposal.	0.1	0.1	0.1			0.3
6/23/16	Emails w TURN re global settlement proposal, small commercial customer interests in MWC, and importance of incorporating SBUA-PG&E MOU.	0.1		0.1	0.1		0.3
6/24/16	Emails w PG&E re next settlement call.				0.1		0.1
6/28/16	Attend all-party settlement conference call w PG&E.				0.8		0.8
6/29/16	Emails w PG&E re next all-party settlement call.				0.1		0.1
6/30/16	Conference call w S. Frank re MWC IV and MWC FC and TURN and ORA proposals thereto.	0.2		0.1			0.3
6/30/16	Review MOUs w PG&E and other intervenors/parties re terms that impact small commercial customers.	0.1	0.1	0.1			0.3
7/1/16	Attend all-party conference call w PG&E re settlement discussions.				1		1

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
7/5/16	Review ALJ Roscow email re request for PG&E to compile testimony and exhibits.					0.1	0.1
7/6/16	Tcw M. Klotz (PG&E) re MWC IV.	0.2					0.2
7/7/16	Revise and review amendment to settlement agreement w PG&E from 2014 GRC Ph. 1; emails M. Klotz re the same.	0.4					0.4
7/9/16	Review PG&E exhibit list for SBUA expert report.					0.1	0.1
7/12/16	Prepare for and attend all party settlement conference w PG&E and other parties.				1		1
7/12/16	Analyze settlement term sheet by and between PG&E and collective group of ORA, TURN, SBUA and others; review proposed changes to SBUA MOU w PG&E; review term sheets for PG&E and irrigation districts re economic development.	0.2	0.1	0.2			0.5
7/13/16	Emails w PG&E re next settlement call.				0.1		0.1
7/14/16	Analyze PG&E's revised language in SBUA-PG&E MOU on revenue allocated to SB customer service; emails w M. Kotz re suggested edits re the same.	0.6					0.6
7/15/16	Review updated term sheet from PG&E; attend all-party settlement conference call w PG&E.				1.4		1.4
7/15/16	Emails w M. Klotz re revised MOU terms and small business support of a total of \$32.32 for the years 2017-2020.	0.2					0.2
7/18/16	Emails w PG&E re seventh all-party settlement conference call.				0.1		0.1
7/19/16	Review updated term sheet; attend all-party settlement conference call w PG&E and other parties.				1.3		1.3

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
7/20/16	Review Attachment A to proposed settlement agreement.				0.1		0.1
7/20/16	Emails w TURN re updated party exhibit lists.				0.1		0.1
7/21/16	Attend all-party settlement call w PG&E; review Attachment A financial allocations re MWC IV and MWC FK.	0.6		0.6			1.2
7/25/16	Emails w PG&E re settlement conference calls.				0.1		0.1
7/26/16	Review proposed settlement agreement re SBUA provisions and areas impacting small businesses.			0.2			0.2
7/28/16	Prepare for and attend all-party settlement conference call and review motion for adoption of settlement for SBUA issues.	0.8	0.2	0.2	0.2		1.4
7/29/16	Revise motion and settlement agreement.				0.3		0.3
8/1/16	Prepare for and attend 11th all-party settlement conference; review edits and changes to settlement agreement and motion.				1.4		1.4
8/2/16	Tcw S. Sharp re 3-year versus 4-year; tcw and emails w H. Goodson re the same; analyze TURN's position re the cycle length.			0.4			0.4
8/3/16	Participate in Rule 12.1 settlement conference w PG&E and other parties; emails w PG&E w final execution page of SBUA.				1.6		1.6
8/3/16	Emails w S. Sharp re 3-year versus 4-year rate cycle.			0.1			0.1
8/10/16	Review ALJ's second amended scoping memo.					0.1	0.1
8/19/16	Analyze opening comments of TURN, PG&E, and other intervenors for small business issues.			0.4			0.4

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
8/24/16	Emails w PG&E and review PG&E settlement summary for Aug. 30 PUC workshop.				0.1		0.1
8/26/16	Review reply comments on settlement agmt.				0.3		0.3
8/26/16	Review ALJ's instructions re Aug. 30 workshop and attendant agenda; emails w SBUA's expert re the same.					0.2	0.2
8/29/16	Review PG&E powerpoint presentation;					0.1	0.1
8/31/16	Review email from ALJ re topics and experts required to attend hearings.					0.1	0.1
9/15/16	Emails w PG&E re extension for submission of exhibit to PUC (0.1; no charge).						0
1/18/17	Review notice of ex parte from PG&E re communications from S. Sharp concerning the PUC's limiting of the GRC cycle to 3 or 4 year periods.			0.1			0.1
2/16/17	Review emails from ALJ Roscow re update on proposed decision.					0.1	0.1
2/28/17	Review ALJ's proposed decision for incorporation of SBUA issues and MOU.	0.3	0.1	0.2			0.6
3/3/17	Emails w PG&E re settlement call on ALJ's proposed decision.				0.1		0.1
3/6/17	Emails w PG&E re settlement call.				0.1		0.1
3/7/17	Attend settling party conference call organized by PG&E.				1		1
3/13/17	Emails w S. Frank re comments on PD; review PG&E's proposed joint comments.				0.3		0.3
3/14/17	Attend conference call with joint parties re comments on PD.				1		1
3/16/17	Tcw S. Frank re joint comments on PD.				0.1		0.1

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
3/17/17	Review joint settling party comments; review ALJ email re handling requests for information from PG&E.				0.3		0.3
3/20/17	Review parties' comments on PD.				0.1		0.1
3/21/17	Review opening comments from ORA, TURN, EDF, and CAUSE.				0.3		0.3
3/30/17	Emails w PG&E (S. Frank) re fixed post-year dollar amounts and responses to ALJ questions.				0.2		0.2
4/4/17	Review alternate PD by Commissioner Picker re SBUA issues;				0.1		0.1
4/17/17	Emails w SBUA expert re ORA testimony on post-test year rates.			0.2			0.2
4/17/17	Correspondence w PG&E re Commissioner Picker's Alternate Proposed Decision (APD) and all-party settlement call re the same.				0.1		0.1
4/21/17	Review proposed joint comments on APD; attend conference call w PG&E and other settling parties.				0.3		0.3
4/26/17	Tcw M. Klotz at PG&E re MOU and spending budgets relative to customer outreach.	0.3					0.3
5/13/17	Emails w PG&E re Commission decision to accept settlement agreement.				0.1		0.1
5/17/17	Emails to settling parties w support for Notice to Accept.				0.1		0.1
5/18/17	Review final decision for incorporation of SBUA issues and MOU.	0.1	0.1	0.1			0.3
5/25/17	Review and approve proposed notice to accept alternative settlement terms; emails w S. Frank re the same.				0.1		0.1

Date	Task	Issue A	Issue B	Issue C	Issue D	Issue E	Total
6/20/17	Review CAUSE's motion for rehearing for any issues that impact SBUA interests in settlement. (0.1; no charge)						0
TOTALS		59.1	17.4	28.5	21.8	6.1	132.9
Percentages		44%	13%	21%	16%	5%	

Intervenor Compensation Hours of James Birkelund:

Date	Task	Total
11/25/15	Draft NOI to claim compensation.	0.1
11/17/15	Emails w SBUA expert re NOI.	0.3
11/19/15	Draft NOI to claim intervenor compensation.	1
11/20/15	As above.	0.5
11/23/15	Email correspondence w SBUA expert re NOI, scope of issues, and estimated budget.	0.2
11/23/15	Continue drafting NOI.	2.1
11/24/15	Finalize NOI to claim compensation.	0.2
11/27/15	Conference w SBUA paralegal re finalizing NOI for compensation; discuss proposed PG&E / SBUA MOU and provisions for small commercial customers.	0.6
11/30/15	Finalize NOI for Icomp.	1.6
6/13/17	Draft claim for intervenor compensation; review Commission's updated Intervenor Compensation Program Guide (April 2017).	0.6
7/15/17	Draft intervenor compensation request; review litigation record re the same.	1
7/15/17	Review and examine final time records for all staff on case re duplication of effort, unnecessary time, etc.	1.8
7/16/17	Draft intervenor compensation claim re substantial contributions of SBUA; analyze and reference litigation papers re the same, including final decision, joint comparison exhibit, SBUA testimony, all-party settlement agreement and attendant motions.	2.5
7/17/17	Draft and finalize intervenor compensation claim.	1.9
TOTAL		14.4

Travel Time for J. Birkelund (Santa Monica to San Francisco):

Date	Task	Total
6/14/15	Travel from Santa Monica to attend SBUA and PG&E settlement negotiations.	3.6
6/16/15	Travel back to Santa Monica after SBUA and PG&E settlement negotiations.	3.5
10/29/15	Travel to PHC and return flight to Santa Monica.	3.8
TOTAL		10.9

Attachment 2 - Detailed Hours and expenses for Expert Michael Brown

GRC Phase I Billing Codes and Activities for Small Business Utility Advocates

115.2

	Billing Codes	Activity	% of Time	Hours broken down by billing codes
Issue E	GP	General Participation (procedural, coordination with other parties)	10.68%	12.3
Issue D	Sett	Settlement-related efforts (if required)	17.19%	19.8
Issue A	CUST	Customer Service and Outreach to Small Businesses	38.37%	44.2
Issue B	CON OP	Contracting Opportunities for Small Businesses	13.45%	15.5
Issue C	OTHER	Other Issues (economic development, tracking of small business customers)	20.31%	23.4

DATE	ACTIVITY	DESCRIPTION	HOURS	Explanation of costs
5.2.2015	Sett	Research PG&E's proposed changes to website and changes relevant to small businesses.	0.4	
5.2.2015	CUST	Research PG&E's other methods such as email, etc. for contacting small business customers.	1.1	
5.2.2015	CUST	Evaluated my energy portal for small businesses.	1.8	
5.2.2015	CUST	Investigated efficacy of energy efficiency audits.	0.3	
5.7.2015	OTHER	Read PG&E's testimony and identified issues related to economic development.	0.5	
5.7.2015	OTHER	Read PG&E's testimony and identified issues related to tracking small businesses for the purpose of better serving SMB needs.	0.6	
5.7.2015	CON OP	Read PG&E's testimony and identified issues related to possible harmful procedural effects of supply chain sustainability program on small business contractors.	1.2	
5.8.2015	GP	Created and Send draft of issues to SBUA.	2.1	
5.10.2015	Sett	Revised and sent proposed issues for negotiation to PG&E for evaluation.	0.9	
5.21.15	Sett	Teleconference with various PG&E personnel concerning issues of concern to small businesses.	1.5	
5.21.15	Sett	Teleconference with lawyer for SBUA concerning meeting with PG&E.	0.6	
6.9.15	Sett	Teleconference with PG&E concerning possible settlement.	1.2	

DATE	ACTIVITY	DESCRIPTION	HOURS	Explanation of costs
6.9.15	Sett	Teleconference with SBUA lawyer concerning next steps to obtain settlement. Discussion on strategic alternatives for SBUA on behalf of small business customers.	1.1	
6.9.15	Sett	Received proposed MOU from PG&E, analyzed proposal,	0.2	
6.9.15	OTHER	Drafted proposed changes to PG&E's proposed MOU for Economic Development issues.	0.2	
6.9.15	OTHER	Drafted proposed changes to PG&E's proposed MOU for tracking and better service small commercial customers.	0.3	
6.9.15	CUST	Drafted proposed changes to PG&E's proposed MOU for Customer service and outreach to small commercial customers.	0.3	
6.9.15	CON OP	Drafted proposed changes to PG&E's proposed MOU for contracting opportunities for small commercial customers providing goods and services to PG&E.	0.3	
6.9.15	CUST	Drafted proposed changes to PG&E's proposed MOU for issues related to the creation of a new small business organization specifically dedicated to helping serve the needs of small business customers.	0.4	
6.9.15	CUST	Drafted proposed changes to small business adopters of distributed energy.	0.1	
6.9.15	OTHER	Drafted proposed changes to PG&E's proposed MOU for Economic Development issues.	0.1	
6.10.15	Sett	Drafted and sent email correspondence to PG&E negotiation team. (Confidential)	0.5	
6.23.15	Sett	Teleconference with PG& negotiation team [Steve Frank and Michael]	1.4	
6.23.15	OTHER	Teleconference with PG&E regarding spending target and obligation to small businesses	0.2	
6.23.15	Cust	Teleconference with PG&E regarding overall outreach.	0.3	
6.23.15	OTHER	Teleconference with PG&E regarding economic development funds.	0.4	
6.23.15	OTHER	Teleconference with PG&E regarding tracking of small businesses to target programs for them.	0.1	
6.23.15	OTHER	Teleconference with PG&E regarding implementation of settlement agreement and future meetings.	0.1	

DATE	ACTIVITY	DESCRIPTION	HOURS	Explanation of costs
6.23.15	Sett	Teleconference with SBUA lawyer to discuss meeting and viability of settlement.	0.2	
6.23.15	Cust	Conducted detailed analysis of customer service spending target and actual need of small business customers. Made changes to MOU language.	0.5	
6.25.15	Cust	Teleconference with new leader of small business group in customer service. Gave approval. Brief introduction by other PG&E negotiators. Listed to background of person, talked with new leader, gave brief list of concerns and set up future meetings. Briefly spoke with VP customer care, don't recall her name.	1.3	
6.25.15	Cust	Email correspondence with new director of small business group concerning direction of new small business group.	0.2	
7.23.15	Sett	ONE HOUR PHONE CALL WITH PG&E negotiator regarding final term sheet and unresolved issues. I was passive on this call and was mostly listening in.	1.1	
7.24.15	CUST	Proposed final revisions to final MOU term sheet regarding customer service and outreach	0.1	
7.24.15	CON OP	Proposed final revisions to final MOU term sheet regarding small business contracting opportunities	0.1	
7.24.15	CUST	Proposed final revisions to final MOU term sheet regarding new initiatives such as spending target and direction of new small business organization.	0.1	
7.24.15	OTHER	Looked at attorney's white house initiative language. This wasn't my issue.	0.1	
7.27.15	CON OP	Teleconference with California Asian Chamber of Commerce	0.5	
7.27.15	CON OP	Teleconference with California Asian Chamber of Commerce	0.2	
9.7.15	OTHER	Analysis of work required to support settlement	0.8	
9.13.15	CUST	Email correspondence with director of new business group in San Ramon concerning new business group.	0.2	
9.21.15	CUST	Email correspondence with small business director and person named Salvador concerning website upgrades.	0.2	

DATE	ACTIVITY	DESCRIPTION	HOURS	Explanation of costs
11.24.15	CUST	Began creation of SBUA expert testimony to support settlement and MOU issues related to customer service and outreach	1.9	
11.24.15	CON OP	Began creation of SBUA expert testimony to support settlement and MOU issues related to contracting opportunities for small business contractors	2.1	
11.24.15	CUST	Began creation of SBUA expert testimony to support settlement and MOU issues related to new initiatives for Small Businesses	2	
11.24.15	OTHER	Began creation of SBUA expert testimony to support settlement and MOU issues related to customer service and outreach	1.9	
11.24.15	OTHER	Began creation of SBUA expert testimony to support settlement and MOU issues related to Other issues, primarily dedicated webpage and spending targets.	1.1	
11.25.15	GP	Teleconference with SBUA attorney concerning testimony.	1.9	
2.28.16	CUST	Continued creation of SBUA expert testimony to support settlement and MOU issues related to customer service and outreach	0.2	
2.28.16	CON OP	Continued creation of SBUA expert testimony to support settlement and MOU issues related to contracting opportunities for small business contractors	0.9	
2.28.16	CUST	Continued creation of SBUA expert testimony to support settlement and MOU issues related to new initiatives for Small Businesses	0.5	
2.28.16	OTHER	Continued creation of SBUA expert testimony to support settlement and MOU issues related to customer service and outreach	0.3	
2.28.16	OTHER	Continued creation of SBUA expert testimony to support settlement and MOU issues related to Other issues, primarily dedicated webpage and spending targets.	0.1	
2.29.16	CUST	Continued creation of SBUA expert testimony to support settlement and MOU issues related to customer service and outreach	1.1	
2.29.16	CON OP	Continued creation of SBUA expert testimony to support settlement and MOU issues related to contracting opportunities for small business contractors	0.8	

DATE	ACTIVITY	DESCRIPTION	HOURS	Explanation of costs
2.29.16	CUST	Continued creation of SBUA expert testimony to support settlement and MOU issues related to new initiatives for Small Businesses	0.3	
2.29.16	OTHER	Continued creation of SBUA expert testimony to support settlement and MOU issues related to customer service and outreach	0.5	
2.29.16	OTHER	Continued creation of SBUA expert testimony to support settlement and MOU issues related to Other issues, primarily dedicated webpage and spending targets.	0.1	
3.22.16	CUST	Preparation of materials for Meeting with PG&E. Specific settlement issues needed to be resolved. Received presentation materials from PG&E.	1.2	
3.29.16	CUST	Meeting with PG&E regarding compliance with settlement agreement.	1.7	
3.30.16	CUST	Follow-up conversatons concerning small business issues with PG&E. Mostly how the new organization will function.	1.2	
4.10.16	OTHER	Revised expert testimony based on ORA testimony concerning Economic Development funding for small businesses	0.6	
4.10.16	OTHER	Revised expert testimony based on ORA testimony concerning identifying & Categorizing small business customers to better serve them	0.4	
4.10.16	CUST	Revised expert testimony based on ORA testimony concerning customer Service and Outreach	0.4	
4.10.16	CON OP	Revised expert testimony based on ORA testimony concerning contracting Opportunities for Small Businesses	0.4	
4.10.16	CUST	Revised expert testimony based on ORA testimony concerning new Intitiatives for Small Businesses	0.6	
4.10.16	OTHER	Revised expert testimony based on ORA testimony concerning other Issues	0.2	
4.11.16	OTHER	Revised expert testimony based on ORA testimony concerning Economic Development funding for small businesses. Added exhibits & conducted necessary research. Spent entire day on this.	2.1	

DATE	ACTIVITY	DESCRIPTION	HOURS	Explanation of costs
4.11.16	OTHER	Revised expert testimony based on ORA testimony concerning identifying & Categorizing small business customers to better serve them. Added exhibits & conducted necessary research. Spent entire day on this.	1.6	
4.11.16	CUST	Revised expert testimony based on ORA testimony concerning customer Service and Outreach. Added exhibits & conducted necessary research. Spent entire day on this.	3.2	
4.11.16	CON OP	Revised expert testimony based on ORA testimony concerning contracting Opportunities for Small Businesses. Added exhibits & conducted necessary research. Spent entire day on this.	3.1	
4.11.16	CUST	Revised expert testimony based on ORA testimony concerning new Initiatives for Small Businesses. Added exhibits & conducted necessary research. Spent entire day on this.	2.1	
4.11.16	OTHER	Revised expert testimony based on ORA testimony concerning other Issues. Added exhibits & conducted necessary research. Spent entire day on this.	1.9	
4.11.16	Sett	Conversation with SBUA attorney concerning compliance with previous MOU and relationship to current MOU implementation.	0.2	
4.12.16	GP	Deal with Non-disclosure issues with PG&E.	1.1	
4.17.16	Cust	Create and send discovery request to pg&e concerning other testimony on smb issues and business impact department of PG&E.	1.1	
4.21.16	OTHER	Conducted additiona research for expert testimony based on ORA testimony concerning Economic Development funding for small businesses.	1.1	
4.21.16	OTHER	Conducted additiona research for expert testimony based on ORA testimony concerning identifying & Categorizing small business customers to better serve them.	1.2	
4.21.16	CUST	Conducted additiona research for expert testimony based on ORA testimony concerning customer Service and Outreach.	2.2	
4.21.16	CON OP	Conducted additiona research for expert testimony based on ORA testimony concerning contracting Opportunities for Small Businesses.	1.9	

DATE	ACTIVITY	DESCRIPTION	HOURS	Explanation of costs
4.21.16	CUST	Conducted additiona research for expert testimony based on ORA testimony concerning new Intitatives for Small Businesses.	1.1	
4.21.16	OTHER	Conducted additiona research for expert testimony based on ORA testimony concerning other Issues.	1.1	
4.21.16	GP	emailed PG&E on use of exhibit provided by them	0.1	
4.22.16	OTHER	Attempted to finalize expert testimony concerning Economic Development funding for small businesses.	0.2	
4.22.16	OTHER	Attempted to finalize expert testimony concerning identifying & Categorizing small business customers to better serve them.	2.5	
4.22.16	CUST	Attempted to finalize expert testimony concerning customer Service and Outreach.	2.3	
4.22.16	CON OP	Attempted to finalize expert testimony concerning contracting Opportunities for Small Businesses.	1.5	
4.22.16	CUST	Attempted to finalize expert testimony concerning new Intitatives for Small Businesses.	0.6	
4.22.16	OTHER	Attempted to finalize expert testimony concerning ORA testimony concerning other Issues.	2.5	
4.25.16	OTHER	Respond to comments by SBUA attorney	0.6	
4.26.16	Cust	Conversation with PG&E concerning discovery requests	0.6	
4.28.16	CUST	Made necessary changes to expert testimony concerning customer Service and Outreach.	3.1	
4.28.16	CON OP	Made necessary changes to expert testimony concerning contracting Opportunities for Small Businesses.	2.5	
4.28.16	CUST	Made necessary changes to expert testimony concerning new Intitatives for Small Businesses.	1	
4.29.16	GP	Revised testimony to improve readability. Did not conduct additional research or add new testimony. Made sure testimony closely matched expected needs of ALJ.	3.1	
4.29.16	Sett	Spoke with lawyer of SBUA about strategy and recommendations in expert report and the need for modifications.	1.2	
5.17.16	Sett	Telephone conversation with PG&E concerning the need for further testimony.	0.9	

DATE	ACTIVITY	DESCRIPTION	HOURS	Explanation of costs
6.8.16	Sett	Discussion of settlement with SBUA attorney	1.1	
6.10.16	Sett	Settlement discussion phone call with Halley Goodson of TURN.	0.9	
6.13.16	Sett	Settlement discussion phone call with ORA; robert (Marc) Pacta and Clayton Cane.	0.6	
6.13.16	Cust	Investigate impact of of less than full funding for MWC IV and MWC FK and provide input to TURN, ORA, and SBUA. Recommended fully funding of MWC IV to the extent necessary to implement MOU.	0.9	
6.22.16	Sett	Evaluated proposed settlement by ORA/TURN. Provided input to SBUA and created first draft of counterproposal.	4.1	
7.7.16	Sett	Evaluated PG&E's proposed amendment to the MOU.	1.6	
7.7.16	Sett	Sent email to SBUA about proposed amendment.	0.1	
10.6.16	Cust	Drive from Bakersfield to San Ramon for meeting with PG&E's new small business customer service division.	2.25	4.5 hours driving - bakersfield to San ramon (only paid half time)
10.7.16	Cust	Met with PG&E regarding implementation of settlement agreement	3.5	
10.7.16	Cust	Drive from San Ramon back to Bakersfield.	2.25	4.5 hours return driving - San Ramon to Bakersfield (only paid half time)
2.28.17	GP	Compiled hours for submission to the Commission for intervenor Compensation	4	

Attachment 3

Small Business Utility Advocates: Paralegal support provided in PUC proceeding

Amy Macaux Time Sheet

Date	Task	Time
10/22/15	Review and edit of Motion for Party Status in PUC general rate case with focus on small commercial customer issues of importance to Small Business Utility Advocates (SBUA) (SBUA) phase 1 (15-09-001)	1.5
10/27/15	Review other parties protests/motions for issues salient to small business interests	1
10/28/15	Review other parties protests/motions for issues salient to small business interests; tcw SBUA attorney re the same	1.5
11/20/15	Review and prepare for filing SBUA's Notice of Intent to Claim Compensation; tcw SBUA attorney re the same	1
4/27/16	Review, edit and revise SBUA expert report to ensure all issues relevant to SBUA members are effectively addressed	1.3
TOTAL HOURS		6.3

Attachment 4

Background and Hours for Brittney K. Marra

A. Explanation of Request for Hourly Rate

Small Business Utility Advocates (SBUA) requests a first-time representative hourly rate for Brittney K. Marra, Assistant Executive Director for SBUA, of \$155 per hour for 2015. Ms. Marra has no previously approved rate by the Commission.

Ms. Marra serves as SBUA's Assistant Executive Director and has expertise working with small businesses. Previously, from 2012-2016, Ms. Marra worked in business development positions for several small corporations, like Streetcast and Support Information Exchange. (*See* summary below.) Ms. Marra also attended Saint Mary's University in Halifax, Nova Scotia in 2004-2006 where she studied political science.

Ms. Marra's requested first-time representative hourly rate of \$155 for 2015 is reasonable. It compares favorably with other rates the Commission has approved for advocates, such as Assistant Executive Directors, with comparable qualifications. *See, e.g.,* D1512041 (B. Olhasso, Asst. Exec. Director at \$155 in 2014); D1506024 (F. Bautista at \$165/hr. in 2014). Rates have increased over time since 2014 and Ms. Marra's requested rate is in line with statutory requirements and the Commission's guidelines. *See* PUC § 1806; guidelines in D.05-11-031.

B. Summary of Experience of Brittney Marra

Small Business Utility Advocates

Assistant Executive Director

(2015-present)

Volunteer, Membership Support

(2013-2015)

Job Description/ Responsibilities

- Develop SBUA membership across California, including with field work and direct communications with small businesses owners.
- Engage in outreach and education with small business community.
- Assist in developing positions on behalf of small commercial customers in proceedings before the California Public Utilities Commission.

Streetcast

Sales & Business Development

www.streetcast.com

(2014-2016)

Job Description/ Responsibilities

- Work with small businesses, business associations, and economic development groups.
- Form marketing agreements and work to onboard businesses.

- Create strategic social media and offline marketing campaigns to create consumer awareness; lead mobile application launch for small businesses.

Support Information Exchange

www.yoursix.ca (Toronto, ON)

Sales & Marketing

(2012-2014)

Job Description/Responsibilities

- Marketed and sold online document exchange services to Family Law Attorneys.
- Presented to small to large size offices.
- Supported customers with in office and remote training and troubleshooting.
- Helped develop marketing campaigns.

C. Hourly Records for Brittney Marra

TIME SHEETS FOR BRITTNEY MARRA		
Issues A - Outreach and Education		
DATE	ACTIVITY	TIMES
6/15/15	Conference w SBUA attorney re potential settlement terms in a memorandum of understanding; consider and develop positions based on SBUA member feedback on issues of outreach and communications.	1.5 hr
3/15/16	Meeting w SBUA attorney re intervenor testimony and developing support re outreach and communication for small businesses.	0.8 hr
3/30/16	As above.	0.3 hr
4/6/2016	Strategy meeting w SBUA attorney re providing support for SBUA's intervenor testimony; provide SBUA membership feedback re the same.	1.2 hr
4/13/2016	Advocacy outreach and conversations with small businesses in Bay Area as part of effort to determine concerns with PG&E's GRC and importance of additional outreach and education; outline results for support of intervenor testimony.	3.7 hr
4/15/2016	Advocacy outreach and conversations with small businesses in Eureka/Butte County/N. Cal as part of effort to determine concerns with PG&E's GRC and importance of additional outreach and education; outline results for support of intervenor testimony.	3.0 hr
4/19/2016	Advocacy outreach and conversations with small businesses in East Bay Area (Walnut Creek,	3.5 hr

	Mariposa, etc.) as part of effort to determine concerns with PG&E's GRC and importance of additional outreach and education; outline results for support of intervenor testimony.	
4/27/2016	Conference call w SBUA attorney regarding SBUA member concerns in PG&E rate case and results of research re outreach and education needs in PG&E territory.	1.0 hr.
6/10/2016	Tcw SBUA attorney re PG&E's funding support for education and outreach for small commercial customers.	0.2 hr.
Total		15.2 hr.

ATTACHMENT 5

Travel Expenses for J. Birkelund



James Birkelund <jamesbirkelund@gmail.com>

Flight reservation (HVW3WH) | 29OCT15 | SFO-LAX | Birkelund/James

1 message

Southwest Airlines <SouthwestAirlines@luv.southwest.com>
Reply-To: Southwest Airlines <no-reply@luv.southwest.com>
To: JAMESBIRKELUND@hotmail.com

Thu, Oct 8, 2015 at 4:03 PM

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Upcoming Trip: 10/29/15 - Los Angeles[Air itinerary](#)**AIR Confirmation:** HVW3WH

Confirmation Date: 10/8/2015

Passenger(s)	Rapid Rewards #	Ticket #	Expiration	Est. Points Earned
BIRKELUND/JAMES	191060015	5262149628428	Oct 7, 2016	273

Rapid Rewards points earned are only estimates. Visit your (MySouthwest, Southwest.com or Rapid Rewards) account for the most accurate totals - including A-List & A-List Preferred bonus points.

Date	Flight	Departure/Arrival
Thu Oct 29	2595	Depart SAN FRANCISCO, CA (SFO) on Southwest Airlines at 10:00 PM Arrive in LOS ANGELES, CA (LAX) at 11:25 PM Travel Time 1 hrs 25 mins Wanna Get Away



Check in for your flight(s): 24 hours before your trip on [Southwest.com](#) or your mobile device to secure your boarding position. You'll be assigned a boarding position based on your check-in time. The earlier you check in within 24 hours of your flight, the earlier you get to board.



Bags fly free®: First and second checked bags. [Weight and size limits apply](#). One small bag and one personal item are permitted as [carryon](#) items, free of charge.



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SFO WN LAX45.49TZNUHNR 45.49 END ZPSFO XFSFO4.5 AY5.60\$SFO5.60



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boarding process



Learn about inflight
WiFi & entertainment

Cost and Payment Summary

AIR - HVW3WH

Base Fare	\$ 45.49
Excise Taxes	\$ 3.41
Segment Fee	\$ 4.00
Passenger Facility Charge	\$ 4.50
September 11th Security Fee	\$ 5.60
Total Air Cost	\$ 63.00

Payment Information

Payment Type: Visa XXXXXXXXXXXX9447
Date: Oct 8, 2015
Payment Amount: \$63.00



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7/15/2017

Gmail - Flight reservation (HVW3WH) | 29OCT15 | SFO-LAX | Birkelund/James

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James Birkelund <jamesbirkelund@gmail.com>

Flight reservation (8UJ3NW) | 12JUN15 | LAX-SFO | Birkelund/James

1 message

Southwest Airlines <SouthwestAirlines@luv.southwest.com>
 Reply-To: Southwest Airlines <no-reply@luv.southwest.com>
 To: JAMESBIRKELUND@hotmail.com

Fri, May 8, 2015 at 8:58 AM

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Thanks for choosing Southwest® for your trip! You'll find everything you need to know about your reservation below. Happy travels!

Upcoming Trip: 06/12/15 - San Francisco


[AIR Itinerary](#)

AIR Confirmation: 8UJ3NW

Confirmation Date: 05/8/2015

Passenger(s)	Rapid Rewards #	Ticket #	Expiration	Est. Points Earned
BIRKELUND/JAMES	191060015	5262106880813	May 7, 2016	702

Rapid Rewards points earned are only estimates. Visit your (MySouthwest, Southwest.com or Rapid Rewards) account for the most accurate totals - including A-List & A-List Preferred bonus points.

Date	Flight	Departure/Arrival
Fri Jun 12	4112	Depart LOS ANGELES, CA (LAX) on Southwest Airlines at 6:40 PM Arrive in SAN FRANCISCO, CA (SFO) at 7:55 PM Travel Time 1 hrs 15 mins Wanna Get Away
Tue Jun 16	4573	Depart SAN FRANCISCO, CA (SFO) on Southwest Airlines at 11:40 AM Arrive in LOS ANGELES, CA (LAX) at 1:10 PM Travel Time 1 hrs 30 mins Wanna Get Away

What you need to know to travel:

- Don't forget to check in for your flight(s) 24 hours before your trip on southwest.com or your mobile device. This will secure your boarding position on your flights.
- Southwest Airlines does not have assigned seats, so you can choose your seat when you board the plane. You will be assigned a boarding position based on your checkin time. The earlier you check in, within 24 hours of your flight, the earlier you get to board.
- WiFi, TV, and related services and amenities may vary and are subject to change based on assigned aircraft. [Learn more.](#)

Remember to be in the gate area on time and ready to board:

- 30 minutes prior to scheduled departure time: We may begin boarding as early as 30 minutes prior to your flight's scheduled departure time. We encourage all passengers to plan to arrive in the gate

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- 10 minutes prior to scheduled departure time: All passengers must obtain their boarding passes and be in the gate area available for boarding at least 10 minutes prior to your flight's scheduled departure time. If not, Southwest may cancel your reserved space and you will not be eligible for denied boarding compensation.
- If you do not plan to travel on your flight: In accordance with Southwest's No Show Policy, you must notify Southwest at least 10 minutes prior to your flight's scheduled departure if you do not plan to travel on the flight. If not, Southwest will cancel your reservation and all funds will be forfeited.

Air Cost: 154.00

Carryon Items: 1 Bag + small personal item are free. [See full details](#). Checked Items: First and second bags fly free. [Weight and size limits apply](#).

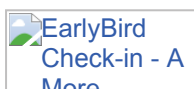
Fare Rule(s): 5262106880813: NONREF/NONTRANSFERABLE/STANDBY REQ UPGRADE TO Y.

Valid only on Southwest Airlines. All travel involving funds from this Confirmation Number must be completed by the expiration date. Unused travel funds may only be applied toward the purchase of future travel for the individual named on the ticket. Any changes to this itinerary may result in a fare increase. Failure to cancel reservations for a Wanna Get Away fare segment at least 10 minutes prior to travel will result in the forfeiture of all remaining unused funds.

LAX WN SFO58.51NLNVWNR WN LAX58.51NDNVHNR 117.02 END ZPLAXSFO
XFLAX4.5SFO4.5 AY11.20\$LAX5.60 SFO5.60



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Cost and Payment Summary

AIR - 8UJ3NW

Base Fare	\$ 117.02
Excise Taxes	\$ 8.78
Segment Fee	\$ 8.00
Passenger Facility Charge	\$ 9.00
September 11th Security Fee	\$ 11.20
Total Air Cost	\$ 154.00

Payment Information

Payment Type: Visa XXXXXXXXXXXX9447
Date: May 8, 2015
Payment Amount: \$154.00



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7/15/2017

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Attachment 6 Summary of Costs for Expert Michael Brown

DATE	DESCRIPTION	ASSOCIATED COSTS
4.29.16	Make physical copies of expert report for Commission. 120 pages @ 10 cents per page. Approximately \$10 for mailing.	\$ 22.00
4.29.16	Postage	\$ 28.00
Total		\$ 50.00