

North American Energy Standards Board

1100 Louisiana, Suite 3625, Houston, Texas 77002
Phone: (713) 356-0060, Fax: (713) 356-0067, E-mail: naesb@aol.com
Home Page: www.naesb.org

NORTH AMERICAN ENERGY STANDARDS BOARD 2002-2003 ANNUAL PLAN - RETAIL ELECTRIC QUADRANT¹

Item Number & Description	Completion ²	Assignment
Retail Access Uniform Business Practices (UBP)³		
1 Billing & Payments <i>Develop practices for billing customers and remitting payments to parties providing services to the customer.</i> Status: Underway	1 st Qtr 2003	Customer Processes Subcommittee
2 Creditworthiness Standards <i>Develop practices for extending commercial credit by Distributors to Suppliers to cover financial risk.</i> Status: Underway	1 st Qtr 2003	Supplier-Utility Interface Subcommittee
3 Customer Enrollment & Switching <i>Develop practices for market participants to process customer switch requests, for maintaining current customer account information regarding a customer's Supplier, and for notifying affected parties.</i>	2 nd Qtr 2003	Customer Processes Subcommittee
4 Supplier Licensing <i>Develop practices for licensing Suppliers with state utility commissions.</i>	2 nd Qtr 2003	Supplier-Utility Interface Subcommittee
5 Retail Meter Data Validation, Editing & Estimating <i>Develop procedures for insuring the integrity and validity of retail customer metering data that is needed by utilities and suppliers for billing, load profiling, settlement, etc. Issues related to unbundled or competitive metering are not to be considered.</i>	3 rd Qtr 2003	Supplier-Utility Interface Subcommittee

¹ As outlined in the NAESB Bylaws, the REQ will also address requests submitted by members and assigned to the REQ through the Triage Process.

² Dates in the completion column are by end of the quarter for completion by the assigned committee. The dates do not necessarily mean that the standards are fully staffed so as to be implementable by the industry, and/or ratified by membership. If one item is completed earlier than planned, another item can begin earlier and possibly complete earlier than planned. There are no begin dates on the plan.

³ A "Glossary" exists from the November 2000 UBP document that should be maintained and updated as a common glossary for all items under this sub-heading as the sub-committees address the UBP items in this section of the Plan.

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Item Number & Description	Completion	Assignment
Retail Access Uniform Business Practices (UBP) (continued)		
6 Customer Information <i>Develop practices for the release, collection, exchange & maintenance of customer information between Distributors and Suppliers.</i>	3 rd Qtr 2003	Customer Processes Subcommittee
7 Load Profiling <i>Develop practices for using statistical methods to estimate interval consumption by customers who do not have interval meters.</i>	3 rd Qtr 2003	Supplier-Utility Interface Subcommittee
8 Customer Inquiries <i>Develop procedures for responding to customer inquiries directed to Distributors and/or Suppliers and for notification of the other party.</i>	4 th Qtr 2003	Customer Processes Subcommittee
9 Market Participant Interactions <i>Develop supplier registration processes for Distributors and protocols for communications and interactions between Distributors and Suppliers.</i>	4 th Qtr 2003	Supplier-Utility Interface Subcommittee
10 Utility - Supplier Disputes <i>Develop dispute resolution procedures applicable to differences between Distributors and Suppliers.</i>	4 th Qtr 2003	Supplier-Utility Interface Subcommittee
11 Settlement Process <i>Reconcile energy schedules and energy delivered by suppliers within a given market. Note: will need to be coordinated with the WEQ.</i>	1 st Qtr 2004	Supplier-Utility Interface Subcommittee

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Item Number & Description	Completion	Assignment
Data Exchange Protocols⁴		
12 Electronic Delivery Mechanisms <i>Develop electronic delivery mechanism guidelines including but not limited to: transactional data interchange, web sites, and bulletin boards.</i> Status: Underway	4 th Qtr 2002	Technical Electronic Implementation
13 Technical Electronic Implementation Standards - Billing & Payments	2 nd Qtr 2003	Technical Electronic Implementation
14 Technical Electronic Implementation Standards - Customer Enrollment and Switching	3 rd Qtr 2003	Technical Electronic Implementation
15 Technical Electronic Implementation Standards - Metering	4 th Qtr 2003	Technical Electronic Implementation
16 Technical Electronic Implementation Standards - Load Profiling	4 th Qtr 2003	Technical Electronic Implementation
17 Technical Electronic Implementation Standards - Customer Information	4 th Qtr 2003	Technical Electronic Implementation

⁴ Data exchange standards for Uniform Business Practices should be completed by the end of the quarter following the quarter in which the Executive Committee adopts the model business practices for that area of focus.

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Name	Seg	Company	Email	Phone	Fax
Wholesale Gas Quadrant					
Triage:					
Kim Van Pelt	pl	CMS Panhandle Eastern Pipe Line Co.	kvanpelt@cmsenergy.com	713-989-7354	713-989-1121
Mike Novak	l	National Fuel Gas Distribution	novakm@natfuel.com	716-857-7884	716-857-7687
Tina Burnett	e	Boeing Co.	tina.m.burnett@boeing.com	206-544-5752	206-544-5245
Keith Sappenfield	s	EnCana Corporation	keith.sappenfield@encana.com	832-204-1247	713-952-3617
Sheri Heslington	p	Dominion Exploration & Production, Inc.	sheri_j_heslington@dom.com	801-463-1390	801-463-9443
Alternates:					
Randy Young	pl	Gulf South Pipeline Company, LP	randy.young@gulfsouthpl.com	713-544-4715	713-544-6257
Dolores Chezar	l	KeySpan Energy	dchezar@keyspanenergy.com	718-403-2927	718-246-2927
Bill Hebenstreit	e	El Paso Merchant Energy, LP	hebenstreit.bill@epenergy.com	713-420-3474	713-420-7577
Jim Buccigross	s	8760 Inc.	jhb@8760.com	508-238-0345	508-238-0858
NONE LISTED	p				
Business Practices:					
Kim Van Pelt	pl	CMS Panhandle Eastern Pipe Line Co.	kvanpelt@cmsenergy.com	713-989-7354	713-989-1121
Mike Novak	l	National Fuel Gas Distribution	novakm@natfuel.com	716-857-7884	716-857-7687
Tina Burnett	e	Boeing Co.	tina.m.burnett@boeing.com	206-544-5752	206-544-5245
Keith Sappenfield	s	EnCana Corporation	keith.sappenfield@encana.com	832-204-1247	713-952-3617
Sheri Heslington	p	Dominion Exploration & Production, Inc.	sheri_j_heslington@dom.com	801-463-1390	801-463-9443
Contracts:					
Suzanne Calcagno	s	UBS Warburg Energy	suzanne.calcagno@ubswenergy.com	713-584-4880	713-584-2138
Keith Sappenfield	s	EnCana Energy Services	keith.sappenfield@encana.com	832-204-1247	713-952-3617
EDM:					
Carl Caldwell	s	CGI	carl.caldwell@cgiusa.com	713-868-5537 x1134	281-360-0301
Dick Brooks	s	Systrends, Inc.	dick@systrends.com	480-756-6777	240-352-0714
Leigh Spangler	s	Latitude Technologies, Inc.	lspangler@latitudetech.net	972-747-1983	972-747-8067
Christopher Burden	pl	Williams Gas Pipeline	christopher.burden@williams.com	713-503-0493	713-215-3946
IR:					
Dale Davis	pl	Williams Gas Pipeline	dale.m.davis@williams.com	713-215-2396	713-215-3946
Technical:					
Kim Van Pelt	pl	CMS Panhandle Pipe Line	kvanpelt@cmsenergy.com	713-989-7354	713-989-1121

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Name	Seg	Company	Email	Phone	Fax
		Companies			
Annual Plan Subcommittee:					
Randy Young	pl	Gulf South Pipeline Company, LP	randy.young@gulfsouthpl.com	713-544-4715	713-544-6257
Iris King	pl	Dominion Transmission, Inc.	iris_g_king@dom.com	304-627-3213	304-627-3530
Sheri Heslington	p	Dominion Exploration & Production, Inc.	sheri_j_heslington@dom.com	801-463-1390	801-463-9443
Dolores Chezar	l	KeySpan Energy	dchezar@keyspanenergy.com	718-403-2987	718-246-2927
Rodger Schwecke	l	Southern California Gas Company	rschwecke@socalgas.com	213-244-5573	213-244-8449
Jim Buccigross	s	8760 Inc.	jhb@8760.com	508-238-0345	508-238-0858
NONE LISTED	e				

Retail Electric Quadrant

Triage:					
Heidi Schrab	su	Green Mountain Energy Company	heidi.schrab@greenmountain.com	512-691-6104	512-691-6151
Barbara Alexander	e	Maine Office of Public Advocate	barbalex@ctel.net	207-395-4143	207-395-4143
Ruth Kiselewich	d	Baltimore Gas & Electric Co.	ruth.c.kiselewich@bge.com	410-265-4003	410-265-4696
Rob Connell	s	Electric Reliability Council of Texas	rconnell@ercot.com	512-248-3963	512-248-3963

Alternates:					
Theresa Hess	su	Reliant Energy Retail Services	thess@reliant.com	713-207-7106	713-207-0399
Jim Minneman	s	PPL Solutions	jmminneman@pplweb.com	610-774-5774	610-774-7229
Terry Moran	d	Public Service Electric & Gas Co.	terrence.moran@pseg.com	973-430-7105	973-624-4107
Steve LaFond	e	Boeing	steven.c.lafond@boeing.com	206-544-0583	

Customer Processes Subcommittee:					
Walt Fenoglio	su	TXU Energy	walt.fenoglio@txu.com	214-812-3115	214-812-5014
Rick Alston		Old Dominion Electric Cooperative	ralston@odec.com	804-968-4051	804-747-5742
Felecia Lokey	su	TXU Energy Retail	felecia.lokey@txu.com	214-812-8896	214-812-5014

Supplier-Utility Interface Subcommittee:					
Cherie Broadrick	e	ERCOT	cbroadrick@ercot.com	512-225-7213	

Technical Electronic Implementation Subcommittee:					
Dick Brooks	s	Systrends, Inc.	dick@systrends.com	480-756-6777	240-352-0714

Annual Plan Subcommittee:					
Theresa Hess	su	Reliant Energy Retail Services	thess@reliant.com	713-207-7106	713-207-0399
Jim Minneman	s	PPL Solutions	jmminneman@pplweb.com	610-774-5774	610-774-7229
Terry Moran	d	Public Service Electric & Gas Co.	terrence.moran@pseg.com	973-430-7105	973-624-4107
Steve LaFond	e	Boeing	steven.c.lafond@boeing.com	206-544-0583	

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Name	Seg	Company	Email	Phone	Fax
Wholesale Electric Quadrant					
Triage:					
Jack Leonard	d	PECO Energy Company	jack.leonard@peco-energy.com	215-841-4879	215-841-4234
Barry Green	g	Ontario Power Generation	barry.green@opg.com	416-592-7883	416-592-8519
Mike Gildea	m	Duke Energy North America, LLC	mfgildea@duke-energy.com	713-598-5082	713-627-6566
John Hughes	e	Electricity Consumers Resource Council	jhughes@elcon.org	202-682-1390	202-289-6370
Darrell Gerrard	t	PacifiCorp	darrell.gerrard@pacificorp.com	503-813-6994	
Alternates:					
Daniel Cooper	d	Michigan Public Power Agency	dcooper@mpower.org	517-232-8919 x114	517-323-8373
Bob Goss	g	Southeastern Power Administration	bobg@sepa.doe.gov	706-213-3860	706-213-3884
Joel Dison	m	Southern Company Services	jjdison@southernco.com	205-257-6481	205-257-6824
Steve Sayuk	e	ExxonMobil Gas Marketing	steve.m.sayuk@exxonmobil.com	713-656-3203	713-656-7343
Mary Ellen Paravalos	t	National Grid USA	mary.ellen.paravalos@us.ngrid.com	508-389-3233	508-389-3129
Market Standard Subcommittee:					
Mike Gildea	m	Duke Energy North America	mfgildea@duke-energy.com	713-598-5082	713-627-6566
Ed Davis	t	Entergy Services, Inc.	edavis@entergy.com	504-310-5884	504-310-5877
Barry Lawson	e	National Rural Electric Cooperative Assoc.	barry.lawson@nreca.org	703-907-5781	703-907-5517
Syd Berwager	d	Bonneville Power Administration	sdberwager@bpa.gov	503-230-5657	503-230-7463
Market Operations Subcommittee:					
Mary Ellen Paravalos	d	US National Grid	mary.ellen.paravalos@us.ngrid.com	508-389-3233	508-389-3129
Lou Oberski		Dominion Energy Marketing, Inc.	lou_oberski@dom.com	804-273-4064	804-273-2927
Contracts:					
Joel Dison	m	Southern Company Services	jjdison@southernco.com	205-257-6481	205-257-6824
Alan Johnson	m	Mirant	alan.r.johnson@mirant.com	678-579-3108	678-579-7726
Keith Sappenfield	s	EnCana Corporation	keith.sappenfield@encana.com	832-204-1247	713-952-3617
Annual Plan Subcommittee:					
John Hughes	e	Electricity Consumers Resource Council	jhughes@elcon.org	202-682-1390	202-289-6370
Randy Corbin	e	Ohio Consumers Counsel	corbin@occ.state.oh.us	614-466-9469	614-466-9475
Ed Thompson	d	Consolidated Edison	thompsonedwin@coned.com	212-460-8199	212-673-0649
Thomas Ringenbach	d	American Electric Power	tjringenbach@aep.com	614-883-7542	614-883-7725

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Name	Seg	Company	Email	Phone	Fax
Syd Berwager	d	Bonneville Administration Power	sdberwager@bpa.gov	503-230-5657	503-230-7463
Tony Reed	g	Southern Company Services	tareed@southernco.com	205-257-7766	205-257-5858
Steven Corneli	g	NRG Power Marketing Inc.	steve.corneli@nrgenergy.com	612-313-8928	612-492-8301
Brian Evans-Mongeon	g	Vermont Public Power Supply Authority	bemongeon@vppsa.com	802-244-7678 x232	802-244-6889
Charles Yeung	m	Reliant Energy Services, Inc.	cyeung@reliant.com	713-207-2935	713-207-9256
Alan Johnson	m	Mirant Americas Energy Marketing	alan.r.johnson@mirant.com	678-579-3108	678-579-5760
Steven Cobb	t	Salt River Project	sccobb@srpnet.com	602-236-3965	602-236-3808
Ed Davis	t	Entergy Services Inc.	edavis@entergy.com	504-310-5884	504-310-5877
Barbara Rehman	t	Bonneville Administration Power	bmrehman@bpa.gov	360-418-8079	360-418-8207
Retail Gas Quadrant					
Triage:					
Rod Sipe	s	New Science Partners	rod.sipe@enform.com	713-350-1014	713-438-1000
Bruce Hayes	e	Ohio Consumers Counsel	hayes@occ.state.oh.us	614-387-2964	614-466-9475
Suzanne Calcagno	su	UBS Warburg Energy	suzanne.calcagno@ubswenergy.com	713-584-4880	713-584-2138
Nancy Cianflone	d	KeySpan Energy Delivery	ncianflone@keyspanenergy.com	718-403-2505	718-596-7802
Alternates:					
Marcy McCain	su	Duke Energy – Algonquin	mlmccain@duke-energy.com	713-627-4738	713-627-5947
Steve Zavodnick	d	Baltimore Gas & Electric	steven.m.zavodnick@bge.com	410-291-4908	410-291-5104
Customer Processes Subcommittee:					
Bill Oppenheim	d	Peco Energy Company	william.oppenheim@peco-energy.com	610-832-6414	610-832-6499
Supplier-Utility Interface Subcommittee:					
Suzanne Calcagno	su	UBS Warburg Energy	suzanne.calcagno@ubswenergy.com	713-584-4880	713-584-2138
Technical Electronic Implementation Subcommittee:					
Rod Sipe	s	New Science Partners	rod.sipe@enform.com	713-350-1014	713-438-1000
George Behr	s	Energy Services Group, Inc.	gbehr@energyservicesgroup.net	717-975-1927	801-991-7614
Annual Plan Subcommittee:					
Steve Zavodnick	d	Baltimore Gas & Electric	steven.m.zavodnick@bge.com	410-291-4908	410-291-5104
Marcy McCain	su	Duke Energy – Algonquin	mlmccain@duke-energy.com	713-627-4738	713-627-5947
Gas Practices Inventory Task Force:					
Bruce Hayes	e	Ohio Consumers Counsel	hayes@occ.state.oh.us	614-387-2964	614-466-9475
Ken Yagelski	d	Washington Gas	yagelski@washgas.com	703-750-4413	703-750-5553