

**ORA DATA REQUEST
ORA-SCG-120-CY3
SOCALGAS 2019 GRC – A.17-10-008
SOCALGAS RESPONSE
DATE RECEIVED: FEBRUARY 2, 2018
DATE RESPONDED: FEBRUARY 15, 2018**

Exhibit Reference: SCG-19-R

SCG Witness: Michael Baldwin

Subject: Customer Services-Office Operations-CCC Operations

Please provide the following:

1. Referring to Ex. SCG-19-R, page MHB-22, lines 6-8, “SoCalGas is requesting an incremental \$102,000 for 1 FTEs as well as \$1,000 for associated non-labor for a CCC Advisor position to support and manage the new Speech Analytics and Desktop Tagging technology that was implemented in 2017.”

- a. Please provide any cost studies used to determine the need for this position.
- b. How was this function fulfilled in 2017?

SoCalGas Response 1:

- a. SoCalGas did not conduct a formal cost study related to this position. The request is based on an anticipated increase in workload over base year (BY) 2016.
- b. Along with the software that was purchased and implemented during 2017, SoCalGas utilized professional services and consultants who created the initial call categories and tags to obtain the benefits of this new software. With ongoing changes in processes and procedures, the call categories and tags will need to be continuously maintained in order fully utilize the search functionality. The incremental CCC Advisor will perform these functions to enable SoCalGas to realize the benefits from the software.

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2. Referring to Ex. SCG-19-R, page MHB-22, lines 14-16, “SoCalGas is requesting an incremental \$191,000 for 2 FTEs as well as \$2,000 for associated non-labor to add a Training Specialist and a Performance Advisor the Training and Development Team.”

- a. When does SoCalGas plan on hiring these positions?
- b. Please provide any cost studies used to determine the need for this position.
- c. Demonstrate how the current two CCC Performance Advisors currently in place is insufficient for meeting TY 2019 staffing needs, thus requiring the requested new Performance Advisor.

SoCalGas Response 2:

- a. SoCalGas originally planned to hire the Training Specialist in June 2017 and the Performance Advisor in March 2018. The Training Specialist was not hired in 2017 because an employee in the Billing department was able to provide the incremental training needed during 2017. The CCC Support group is still planning to hire resources to provide the Billing and Special Investigation training.
- b. SoCalGas did not conduct a formal cost study related to these positions. The request is based on an anticipated increase in workload over BY 2016.
- c. The two current CCC Performance Advisors are focused on leading the coaching initiative for supervisors. The CCC Performance Advisors coach and develop 29 supervisors and 8 training specialists to ensure they are following the CCC internal coaching process.

During 2017, the CCC implemented a Lead Optimization project. There are 29 supervisor teams and each supervisor team has at least 1 Lead CSR on their team who, in addition to responding to procedure and policy questions and answering elevated calls, are performing Silent Monitors and Side by Sides with the CSRs on their team. Lead CSRs have not been formally trained on how to coach. The new Performance Advisor will be responsible for: training all Lead CSRs on the coaching process, monitoring their interactions, providing feedback, and ensuring that effective coaching is taking place. The span of control is currently 19 supervisors to 1 Performance Advisor and adding over 30 leads would raise the span of control to 34:1, which would lessen the effectiveness. Coaching to modify CSR work behaviors typically results in a lower Average Handle Time and improved customer satisfaction.

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3. Referring to Ex. SCG-19-R, page MHB-23, lines 17-19, “SoCalGas is requesting an incremental \$165,000 for 2 FTEs as well as \$2,000 in associated non-labor to expand the number of the Special Investigations Clerks in order to comprehensively handle customer issues, complaints and escalations.”

- a. Please provide the cost studies performed to determine the need for two incremental FTEs.
- b. Please provide a chart or spreadsheet showing the number of employees who performed this function over the last 5 recorded years (2012-2016, 2017 if available).

SoCalGas Response 3:

- a. SoCalGas did not conduct a formal cost study related to these positions. The request is based on an anticipated increase in workload over BY 2016.
- b. Below is a summary of the Special Investigation Clerk FTEs for the last 5 recorded years (2012-2016). 2017 data will not be available until mid-March.

	2012	2013	2014	2015	2016
Special Investigation Clerk FTES	7.50	6.82	6.35	6.48	6.49

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4. Referring to Ex. SCG-19-R, page MHB-24, lines 19-21, “SoCalGas is requesting an incremental \$628,000 for 6.7 FTEs as well as \$3,000 in associated non-labor for the full year staffing costs of CCC Support Management Positions described below.

- a. Please provide the cost studies performed to determine the need for 6.7 incremental FTEs.
- b. Please provide a chart or spreadsheet showing the number of employees who performed this function over the last 5 recorded years (2012-2016, 2017 if available).

SoCalGas Response 4:

- a. SoCalGas did not conduct a formal cost study related to these positions. The request is based on an anticipated increase in workload over BY 2016.
- b. Below is the summary of the recorded CCC Support Management position FTEs for the last 5 recorded years (2012-2016). 2017 data will not be available until mid-March.

Position	2012	2013	2014	2015	2016
CCC IVR Technology Manager	0.40	0.99	1.03	1.05	0.62
CCC Performance Advisor	-	-	-	0.71	1.15
CCC Training Specialists	6.20	7.78	7.22	6.05	5.76
CCC Operations Support & Specialty Group Manager	0.9	0.9	0.9	0.9	0.8
CCC LOS Administrator	2.89	2.93	2.84	3.49	3.55
Total FTEs	10.39	12.59	11.98	12.20	11.89

The CCC IVR Technology Manager was in both the CCC Operations Support and CCC Operations workgroups during the recorded five-year period. The numbers above reflect the position in both areas throughout the five-year period. Below is the breakout between CCC Operations Support and CCC Operations during the five-year period.

	2012	2013	2014	2015	2016
CCC Technology Mgr (CCC Operations)	-	-	-	1.1	0.5
CCC Technology Mgr (Operations Support))	0.4	1.0	1.0	-	0.1
Total CCC Technology Manager FTEs	0.4	1.0	1.0	1.1	0.6

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5. Referring to Ex. SCG-19-R, page MHB-26, lines 8-10, “SoCalGas is projecting a reduction of \$104,000 for 1.5 FTEs as well as \$2,000 in associated non-labor due to increased productivity for the Customer Correspondence group by using formal Lean Six Sigma methods to optimize business processes.”

- a. Please provide the cost studies performed to determine the need for 1.5 incremental FTEs.
- b. Please provide a chart or spreadsheet showing the number of employees who performed this function over the last 5 recorded years (2012-2016, 2017 if available).

SoCalGas Response 5:

- a. SCG is projecting a decrease, not an increase of 1.5 FTEs, due to increased productivity for the Customer Correspondence group by using formal Lean Six Sigma (LSS) methods to optimize business processes. The recommendations that we are implementing from the LSS project are:
 - Eliminate workload by making the Continuous Service Applications available to customers for download from the website SoCalGas.com; and removing the United States Postal Service (USPS) post office (PO) Box from San Dimas.
 - Increase productivity by allowing 1 clerk to open incoming mail; open all mail at desk, except USPS mail; and apply the LSS method 5S (Sort, Set, Shine, Standardize and Sustain) to the Mail Room.
- b. Below is a summary of the Customer Correspondence Clerk FTEs for the last 5 recorded years (2012-2016). 2017 data will not be available until mid-March.

	2012	2013	2014	2015	2016
Customer Correspondence Clerks	6.8	7.2	6.3	5.6	5.6
Lead Customer Correspondence Clerks	2.0	1.7	2.0	1.9	1.9
Total Customer Correspondence Clerks	8.8	8.9	8.3	7.5	7.4

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6. Referring to Ex. SCG-19-R, page MHB-30, lines 10-11, “SoCalGas is requesting \$97,000 for 1.3 FTEs to account for positions that incurred partial year recorded expenses in BY 2016.” Please provide the calculations performed to develop these figures.

SoCalGas Response 6:

The amount of \$95,000 was the partial year actual cost for four management employees and \$2,000 for a cashier who supported the Aliso Incident. The Branch Office management employees included an Authorized Payment Location Advisor, a Branch Office Supervisor, a Branch Office Technical Advisor, and a Branch Office Project Manager. During the incident, their duties were temporarily assumed by others, however, these employees since have resumed their regular responsibilities. Therefore, the amount of \$97,000, which was excluded from 2016 recorded totals, is requested to fund their full-year salaries for Branch Office regular activities.

Year	Cost Center	Labor	Explanation	Exh. SCG-19-WP-R
2019	2200-0414	27	Adjustment for labor necessary for return to normal operations after temporary deployment to mitigate Aliso leak. Authorized Payment Location Advisor to oversee Authorized Payment Locations.	Page 46
2019	2200-0415	16	Adjustment for labor necessary for return to normal operations after temporary deployment to mitigate Aliso leak. Supervisor to oversee Branch Offices.	Page 46
2019	2200-2050	52	Adjustment for labor necessary for return to normal operations after temporary deployment to mitigate Aliso leak. Technical Advisor and Project Manager to oversee Branch Offices.	Page 46
Sub-Total		95		
2019	2200-0405	2	Adjustment for labor necessary for return to normal operations, branch cashier after temporary deployment to mitigate Aliso leak.	Page 46
Total Adj.		97		

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7. Referring to Ex. SCG-19-R, page MHB-34, lines 8-9, “SoCalGas is requesting an incremental \$133,000 to support the automation of the issuance of large font bills and additional support for data keeping.” Please provide the calculations performed to develop the \$133,000 figure.

SoCalGas Response 7:

This calculation can be found in workpaper Exhibit SCG-19-WP-R on page 54.

Cost to Implement Large Font Bill automation process - IT \$317k labor cost divided into 3 years, noting 1/3 cost in 2019 @ \$105k/year plus \$28k per year labor for maintenance of automation process.

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8. Referring to Ex. SCG-19-R, page MHB-34, lines 14-15, “SoCalGas is requesting an incremental \$91,000 for 1 FTE to account for multiple positions that incurred partial recorded expenses in BY 2016.” Please provide the relevant calculations performed to develop the \$91,000 figure.

SoCalGas Response 8:

These calculations can be found in workpaper Exhibit SCG-19-WP-R on pages 54 and 55.

Year	Cost Center	Labor	Explanation	Page
2019	2200-2028	40	Adjustment for labor necessary for return to normal operations after temporary deployment to mitigate Aliso leak. Supervisor to oversee billing analyst.	Page 54
2019	2200-0348	37	Adjustment for labor necessary for return to normal operations after temporary deployment to mitigate Aliso leak. Supervisor to oversee billing analyst.	Page 55
2019	2200-0226	18	2016 Base Year numbers include approximately 10 months of a Contracts and Compliance Svc Advisor salary (\$69k and .8 FTE). An adjustment of \$18k and .2 FTE has been made to reflect full year staffing levels in forecast years.	Page 55
2019	2200-0227	12	2016 Base Year numbers include approximately 11 months of a Major Markets Billing Service Advisor salary (\$90k and .9 FTE). An adjustment of \$12k and .1 FTE has been made to reflect full year staffing levels in forecast years.	Page 55
2019	2200-0227	-16	2016 Base Year Numbers include approximately 2 months of a Major Markets Billing Analyst II salary (\$16k and .2 FTE) who overlapped replacement staff before retiring that will be removed from the forecast years.	Page 55
Total Adj.		91		

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9. Referring to Ex. SCG-19-R, page MHB-42, lines 11-12, “SoCalGas is requesting an incremental \$670,000 due to an anticipated increase in paper bills resulting from forecasted meter growth from 2016-2019.”

- a. Please provide the relevant calculations performed to develop the \$670,000 figure.
- b. Please provide historical data on costs of postage due to paper bills per meter for the last 5 recorded years (2012-2016, 2017 if available.)

SoCalGas Response 9:

- a. Data from Ex. SCG-19-WP-R, 200005.001 Supplemental Workpaper 1. See Excel file attachment: ORA-SCG-120-CY3 Q9a Attachment.

The incremental postage above BY 2016 due to meter growth is calculated by multiplying the incremental volume of Bills and Billing Letters above BY 2016 after meter growth with the BY 2016 blended postal rate.

- b. Data is derived from Ex. SCG-19-WP-R, 200005.001 Supplemental Workpaper 1. 2017 data will not be available until mid-March.

Cost of postage due to paper bills and billing letters per active meter				
Actual	Actual	Actual	Actual	Actual
2012	2013	2014	2015	2016
\$3.178	\$3.125	\$3.195	\$3.120	\$2.984

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10. Referring to Ex. SCG-19-R, page MHB-42, lines 22-23, “SoCalGas is requesting an increase of \$504,000 for the mailing of the Home Energy Guide.” Please provide historical cost data for the mailing of the Home Energy Guide for the last 5 recorded years (2012-2016, 2017 if available.)

SoCalGas Response 10:

Data from Ex. SCG-19-WP-R, 200005.001 Supplemental Workpaper 2 row 1e. The Home Energy Guide began mailing in August 2013. 2017 data will not be available until mid-March.

	Actual	Actual	Actual	Actual
	2013	2014	2015	2016
Cost of postage	\$10,398	\$98,367	\$192,125	\$257,126