

**TURN DATA REQUEST**  
**TURN-SCG-DR-23**  
**SOCALGAS 2012 GRC – A.10-12-006**  
**SOCALGAS RESPONSE**  
**DATE RECEIVED: JULY 27, 2011**  
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1. Please provide actual 2010 field service orders divided into the types on Workpapers 23-25 to SCG-07R. Provide in spreadsheet format.

**SoCalGas Response:**

The attached spreadsheet provides the 2010 actual field service orders by type, as shown in Exhibit No. SCG-07-WP-R, pp. 23-25.



**TURN DR-23 Q1**  
**Attachment**

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2. Please provide the spreadsheet used to produce Workpapers 23-33 to SCG-07R as Excel with active cells.

**SoCalGas Response:**

The attached file contains the Excel version of workpaper pp. 23-33 in Exhibit SCG-07-WP-R.



TURN DR-23 Q2  
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3. Please provide on-premise plus drive time per order for each type of order in 2005-2008.

**SoCalGas Response:**

Attached is the 2005 through 2008 and 2009 on-premise plus drive time per order for each type of order. The on-premise time varies by order type. The drive time is calculated as an average time per all order types.



TURN DR-23 Q3  
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4. Re: Workpaper 35-37 to SCG-07R,
  - a. Please provide the workpapers in Excel format with active cells.
  - b. Please explain why the amount of training declined from the 2005-2007 time frame to 2008-2009.
  - c. Identify all specific efforts to increase training in 2010 and following years back to the five-year average used by SoCal.
  - d. Please explain why non-labor CFS Operations costs were so much higher in 2005 than in any other year.
  - e. Please explain why non-labor Direct Supervision costs fell from 2005-06 to 2007-09.
  - f. Please explain why non-labor Dispatch costs fell from 2005-06 to 2007-09.
  - g. Please explain why CS Staff labor was considerably higher in 2006 than in all other years.
  - h. Please explain why CS Staff non-labor costs were 70% higher in 2005 than all other years, and why this outlying result should be included in an average.
  - i. Please provide 2010 actual data equivalent to the data shown for 2005-2009 on this entire three pages of workpapers.

**SoCalGas Response:**

- a. Attached is workpaper pp. 35 through 37 from Exhibit No. SCG-07-WP-R in Excel format with active cells.



TURN DR-23 Q4a  
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- b.- c. Training requirements are dependent upon workforce turnover, which varies from year to year. The following table shows the number of employees who were new in a customer service field (CSF) classification and who attended training for the period 2005 through July year-to-date 2011.

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**Response to Question 4 (Continued)**

Customer Service Field 2005 through July YTD 2011 Training							
Class Title	2005	2006	2007	2008	2009	2010	July YTD 2011
<b>Training for Employees New to Classification</b>							
Field Service Assistant	48	20	58	15	14	1	22
Field Technician/ Energy Technician Residential-Apprentice	136	148	113	66	14	14	99
Energy Technician Residential	136	88	131	121	106	78	5
Commercial Service Technician	23	25	24	24	11	17	22
Industrial Service Technician	10	12	23	9	10	9	8
Field Collector	11	26	23	28	17	16	22
<b>Total - New to Classification</b>	<b>364</b>	<b>319</b>	<b>372</b>	<b>263</b>	<b>172</b>	<b>135</b>	<b>178</b>
<b>Supplemental Training <sup>1</sup></b>							
PACER / Mobile Data Terminal	86	26	1	46	1	0	19
Elevated Pressure Training (residential - 2 pound)	137	153	30	24	21	54	0
Large Tonnage Air Conditioning	6	15	6	6	0	0	0
Gas Engine	6	9	12	12	1	13	0
Residential Air Conditioning	0	0	0	0	0	0	14
Industrial Technician Boiler Training	0	0	0	21	0	0	0
Elevated Pressure Training (industrial - 5 & 10 PSI)	0	0	0	0	188	0	0
Industrial Service Technician Seminar	66	65	100	86	90	90	0
Commercial Service Technician Seminar	0	0	99	120	100	110	0
Other <sup>2</sup>	408	625	704	1,120	716	1,630	1,302
<b>Total - Supplemental</b>	<b>709</b>	<b>893</b>	<b>952</b>	<b>1,435</b>	<b>1,117</b>	<b>1,897</b>	<b>1,335</b>

<sup>1</sup> Supplemental training is shorter in duration than training categorized as "New to Classification"

<sup>2</sup> "Other" includes Gas Leak Detector training, Appliance Clinic, and refresher training for CSF employees returning to work from disability

The data shows that in 2005, 2006 and 2007 there were more CSF employees new to classification and trained than in 2008 and 2009. In 2008 and 2009 when workforce turnover was low, training efforts were focused on providing “supplemental” training. Supplemental training is provided to existing employees and includes addressing changes in policies and procedures impacting the way employees perform their job, training on the use of new tools that are deployed to the field, and seminars unique to the duties performed by specific CSF classifications.

Although 2010 did not result in a significant amount of training as a result of workforce turnover, there were a significant number of supplemental training classes conducted during that time. Partial year 2011 data indicates that the CSF workforce is changing and that the more extensive training required when an employee is new to classification is being conducted in conjunction with supplemental training. SCG believes that the five year average forecast of training is most reflective of the mix of training that will be conducted in the forecast years.

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**Response to Question 4 (Continued)**

- d. Customer service field (CSF) operations non-labor costs in 2005 included the purchase of replacement ladders and other miscellaneous tools and equipment such as wrenches, screwdrivers, gloves, etc. These are typical non-labor expenses that are incurred on a non-annual but regular or cyclical basis and therefore are appropriate to leave in the five year average per FTE calculation of forecasted non-labor expenses.
- e. SCG is not able to specifically identify the specific variables that impacted the change in direct supervision non-labor costs from year to year. Examples of supervision non-labor expenses that were incurred and that fluctuated from year to year are communications (mobile phones), travel (to and from meetings), forms and stationary supplies, business cards, etc. These types of costs may vary from year to year and therefore are appropriate to leave in the five year average non-labor per FTE forecasted supervision non-labor expense.
- f. Dispatch non-labor expenses in 2005 and 2006 include the purchase of computer monitors and temporary agency labor used to support the dispatch office until vacancies are filled. These types of costs occur periodically (not necessarily annually) and therefore are appropriate to leave in the five year average calculation of non-labor expense.
- g. The Customer Service Staff labor in 2006 was high as a result of having more Field Instructors and supplemental Quality Assurance Specialists on staff in that year. These positions either perform field rides with customer service field technicians who are new on the job and/or inspect the work that has been completed by a customer service field technician. The Field Instructor and Quality Assurance Specialist positions are entry level management jobs. When employees in these positions are promoted into other jobs, they may or may not be filled behind, depending on the needs at the time. These positions fluctuate from year to year so should be included in the five year average forecast.
- h. Included in 2005 Staff non-labor expenses are the costs of Gallup “Great Manager Programs” training conducted for management employees, consultant costs supporting the development of a customer service field strategic plan and iPAQ pocket PCs for region management. These types of costs vary from year to year so are appropriate to include in the five year average forecast of Staff non-labor.

In responding to this data request, SCG identified that a legal settlement expense in the amount of \$75,000 was included in 2005 historical costs in error. This amount should be excluded when calculating the five year average non-labor forecast. The correction of this error results in a reduction to the non-labor forecast in the amount of \$15,000, from \$461,000 to \$446,000. SCG will address this error at the next available opportunity.

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**Response to Question 4 (Continued)**

- i. The attached file provides 2010 actual data equivalent to the data for 2005 through 2009 shown on workpaper pp. 35-37 in Exhibit SCG-07-WP-R.



TURN DR-23 Q4i  
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5. Re: Workpapers 38 and 39,
  - a. Please identify the annual FGAs for each type of equipment actually experienced in 2010.
  - b. Please provide the labor and non-labor costs for industrial service technicians actually added due to the SCAQMD rule change in 2010.

**SoCalGas Response:**

- a. SoCalGas did not begin tracking flue gas analysis (FGA) data until April of 2010, when Industrial Service Technicians (ISTs) began using mobile data terminals (MDTs). Prior to that time, IST activities, which included FGAs, were documented on paper and were tallied manually and counted as an Industrial Service Order (ISO).

The total number of FGAs by equipment type for **April 2010**, when SoCalGas began tracking FGAs, through December 2010 is shown in the following table. In addition, the comparable data for the period January 1, 2011 through July 31, 2011 is provided. FGAs have essentially doubled year-to-date 2011 over 2010, from 10.8 per day to 20.8 per day.

FGAs By Equipment Type				
Equipment Type	April - December 2010		January - July 2011	
	FGAs	FGAs Per Day	FGAs	FGAs Per Day
Boiler	1,306	6.9	2,318	15.9
Broiler	2	0.0	3	0.0
Dryer	46	0.2	73	0.5
Fryer	4	0.0	0	0.0
Furnace	171	0.9	149	1.0
Gas Engine/Prime Mover	194	1.0	186	1.3
HVAC	11	0.1	11	0.1
Miscellaneous	74	0.4	96	0.7
Oven	161	0.9	143	1.0
Range	0	0.0	1	0.0
Washer	25	0.1	18	0.1
Water Heater	42	0.2	34	0.2
<b>Total FGAs</b>	<b>2,036</b>	<b>10.8</b>	<b>3,032</b>	<b>20.8</b>
	Apr-Dec 2010 Workdays * --->		Jan - Jul 2011 Workdays * --->	
		188		146

\* Workdays exclude holidays and weekends

- b. SoCalGas does not differentiate between Industrial Service Technician (IST) activities performed as a result of the SCAQMD rule changes and those performed for other reasons. However, 2010 ISO activities in total have increased over recorded 2009 activities, which could be attributed to an increase in FGAs as a result of the SCAQMD rules implementation. The following table shows a 15.8% increase in 2010 ISOs over 2009 levels.



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**Response to Question 5 (Continued)**

Year	ISOs *	% Change
2009	15,958	-
2010	18,479	15.8%

\* ISOs represent all activities performed by ISTs and are not limited to FGAs

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6. Please identify all the costs actually incurred in 2010 shown on Workpaper 39.

**SoCalGas Response:**

See response to Question “5.b.” above.

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7. Please provide any available information on actual 2002-2005 field service orders by type and/or the forecast of 2006-2008 field service orders by type in SoCal's 2008 GRC.

**SoCalGas Response:**

Please refer to the attached worksheets that were included in response to data request DRA-SCG-03-SWC in the 2008 GRC. Included in the worksheets is information on actual 2002 through 2005 field service orders by type and the forecast of the 2006 through 2008 field service orders as presented in SoCalGas' 2008 GRC.



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8. A five year average straight-time/over-time ratio is reported on Workpaper 43. Please provide actual straight-time and overtime hours in each year from 2005-2009 used to derive this ratio.

**SoCalGas Response:**

The attached file contains the straight-time and over-time hours for years 2005 through 2009 that were used to derive the five year average rate shown on workpaper p. 43 in Exhibit SCG-07-WP-R.



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9. Regarding Workpaper 101:
- a. Please provide total CSR calls and average active meters for 2010 (data similar to that shown on a forecast basis in SCG-07, Workpaper 101).
  - b. Specifically identify impacts of customer use of the internet and customer use of Interactive Voice Response (IVR) systems on the number of calls per meter.

**SoCalGas Response:**

- a. The following table provides the total CSR calls and average active meters for 2010.

Year	CSR Calls	Average Active Meter	Calls Per Meter
2010	7,215,202	5,516,872	1.31

- b. SoCalGas has not studied the impacts of customer use of the Internet and IVR on a calls per meter basis. However, availability of billing information online may have had some affect in deflecting some billing-related CSR calls (e.g., current account balance and/or payment status). In addition, Web completed transactions (Start, Close, Transfer, Appliance Service Orders, and Payment Arrangement transactions) have increased over recent years, thereby reducing such transactions that would have been handled by a CSR.

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10. Regarding Workpaper 102:

- a. Please provide this page in Excel format with active cells.
- b. Please provide the information on this page on a recorded basis for 2008, 2009, and 2010.
- c. Please explain how CSR level of service is calculated and provide recorded data from 2005-2010.
- d. Please explain how Occupancy is calculated and provide recorded data from 2005-2010.
- e. Please provide the number of hours paid (straight-time and overtime), the number of hours worked, the number of calls, and the overall average handle time for each month for each month from 2007-2010 recorded and 2011 to the latest available month.
- f. Please provide overall average handle time for calls on a monthly basis for 2008-2010 and supporting calculations (i.e., number of calls, number of seconds).

**SoCalGas Response:**

- a. The attached file provides the Excel version of workpaper p. 102 found in Exhibit SCG-07-WP-R. See worksheet titled “DR-23 Q.10a Attach”.



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- b. Please see the file attached in response to “a” above. The worksheet titled “DR-23 Q.10b Attach” includes the 2008 through 2010 recorded data in the format shown on workpaper p. 102.
- c. CSR Level of Service (or, CSR LOS) is defined as the percent of calls answered within 60 seconds of reaching the CSR queue. The denominator is total CSR calls offered (which includes abandoned calls).

Historically, SoCalGas’ LOS goal is based on overall LOS (not CSR LOS), which is defined as the percent of calls answered within 60 seconds. The calls answered include CSR answered calls within 60 seconds plus IVR completed transactions. The denominator is total calls offered (which includes abandoned calls).

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**Response to Question 10 (Continued)**

The 2005 through 2010 CSR LOS and overall LOS are provided in the following table.

Year	CSR LOS	Overall LOS
2005	77.5%	82.6%
2006	76.4%	81.7%
2007	78.4%	83.2%
2008	72.8%	77.4%
2009	71.2%	76.0%
2010	63.8%	70.4%

d. The Occupancy calculation is -

$$\text{Occupancy Rate} = (\text{CSR Talk Time} + \text{CSR After Call Work Time}) / \text{CSR Available Time}$$

Definition of Occupancy Rate terms –

- CSR Available Time = CSR Talk Time + CSR After Call Work Time + CSR Call Wait Time
- CSR Talk Time - the time a CSR spends talking with a customer
- CSR After Call Work Time - the time a CSR requires to finish a customer transaction after the call has been terminated
- CSR Call Waiting Time – the time a CSR is waiting for the next incoming customer call

Historical occupancy rates were not tracked in 2005 and 2006. Due to transition to the new phone system and associated reporting tools, year-to-date occupancy rates are only partially available for 2009. Occupancy rates for 2007, 2008, partial year 2009, and 2010 are as follows:

Year	Occupancy Rate
2005	not available
2006	not available
2007	87.90%
2008	89.20%
2009	*88.7%
2010	87.70%
* January through September only	

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**Response to Question 10 (Continued)**

- e.& f. Please see the file attached in response to “a” above. The worksheet titled “DR-23 Q.10 e & f Attach” includes the 2007 through 2010 and June year-to-date 2011 recorded paid hours, worked hours, number of CSR answered calls and the average handle time (AHT) by month. Note that AHT is presented in number of seconds, and is calculated automatically or generated through standard reports and is not calculated separately by call center staff.



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11. Regarding Workpaper 103:

- a. Please provide the shrinkage factor with two more decimal places (e.g., 32.72% as opposed to 33%) on an annualized basis.
- b. Please explain why the calculation of shrinkage assumes that the full complement of staff must be replaced by other FTEs on holidays when the call center is only open for emergency calls (e.g., Christmas, Thanksgiving).
- c. Please provide recorded data similar to this table for the rest of 2009 and for 2010.
- d. Please explain how “breaks” and “water breaks” are calculated” – as a percentage of total hours in the month or as a percentage of hours actually worked in the month.

**SoCalGas Response:**

- a. The attached worksheet provides the shrinkage with two more decimal places. See the description in part c to this response for changes to the file relative to the served workpapers.



TURN DR-23 Q11  
Attachment

The shrinkage rates for the referenced months simply reflect the higher percentage of time the CSR workforce is unavailable to work due to paid holidays, vacation, and sick time. Although staffing levels differ by day (typical Mondays are greater than Wednesdays) and lower levels are required for holidays, the average shrinkage factor is applied to account for CSR holiday, sick and vacation time. As a matter of fact, during major holidays, vacation requests and sick days are expected to be higher (more CSRs wanting to take vacation or needing sick time). Therefore, this unavailable time (or shrinkage), even with differing daily staffing requirements, would need to be covered in order for calls to be answered at the target level of service.

- b. Please see the attachment included in the response to question “a” above for September through December 2009 and 2010 recorded data used to calculate CSR shrinkage.

In responding to this data request, SoCalGas identified that an amount of CSR "unpaid" time-off was included in the monthly shrinkage rates for 2008 and January through August 2009 in error. Where applicable, corrections have been made to the 2008 and 2009 results. All changes are shaded in yellow on the attached file. See the comparison of the original results to the corrected results shown in cells P57 through R65 of the Excel worksheet. There are no changes to the forecasted number of FTEs as a result of this correction. However, SoCalGas will address this error at the next available opportunity.

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**Response to Question 11 (Continued)**

- c. CSRs are given approximately 21 minutes per 8 hour shift for bathroom or water breaks, or 4.33% of their day. CSRs are also given two 20 minute breaks per eight hour shift, or 8.33% of their day.

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12. Regarding Workpaper 104:

- a. Please explain why labor rates for SoCalGas CSRs are considerably higher than for SDG&E CSRs (\$30.51 Full-Time and \$27.18 part time for SoCal versus \$22.75 full-time and \$18.47 part-time for SDG&E per SDG&E-13, Workpaper 211)
- b. Please provide actual recorded data for 2010 showing total CSRs, divided into full-time, part-time, and over-time.

**SoCalGas Response:**

- a. SoCalGas CSR labor rates are based on the Collective Bargaining Unit Agreement between the Union and the Company. SDG&E CSRs are not covered under the SoCalGas Agreement; therefore labor rates vary from utility to utility. In addition, SDG&E CSRs are compensated through the annual Incentive Compensation Plan (ICP) with target goal of 10% of their base salary.
- b. The following table provides the 2010 recorded number of CSRs divided into full-time, part-time and over-time.

2010 CSR FTEs	
Full-time	321
Part-time	153
Over-time	23
Total	497

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13. Re Workpaper 105,
- a. Please provide non-labor costs per FTE for 2010 in the same format as on this chart.
  - b. Please explain why non-labor costs per FTE were considerably higher in 2006-2007 than in 2005 or 2008-2009.

**SoCalGas Response:**

- a. The 2010 non-labor cost per FTE shown in the same format as shown on workpaper p. 105 in Exhibit No. SCG-07-WP-R is provided below.

Non-labor Per FTE - Operations (\$000)	2010 Recorded
CCC Operations Non-labor	\$345
CCC Operations FTEs	505.3
Non-labor Per FTE	\$0.683

- b. A change of less than \$100 per FTE from year to year, as shown on the table below, is representative of the typical fluctuation in the customer contact center non-labor purchases. Expenses that may vary include such items as employee travel, temporary agency labor, office supplies and CSR head sets.

Recorded in (\$000)					
	2005	2006	2007	2008	2009
Non-labor Per FTE	\$0.619	\$0.670	\$0.719	\$0.620	\$0.618
Year to Year Change		\$0.051	\$0.049	-\$0.098	-\$0.002

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14. Re Workpaper 106, please provide the same data for 2007, 2008, 2009, and 2010 recorded.

**SoCalGas Response:**

The attached file provides 2007 through 2010 recorded data comparable to the data presented on workpaper p. 106 in Exhibit SCG-07-WP-R.



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15. For each day in 2009-2010, provide staffing hours, numbers of IVR calls, numbers of calls taken at the call center, a consistent measure of timeliness of call answers (such as average seconds to answer or percent answered in a given number of seconds), and number of abandoned calls.

**SoCalGas Response:**

The attached file contains 2009 through 2010 staffing hours, number of IVR calls, number of calls taken at the call center, corresponding levels of service, number of pay by phone answered calls, average speed to answer, and number of abandoned calls.



TURN DR-23 Q15  
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Please note that as a result of merging daily data from two different data sources associated with two different phone systems that were in place in 2009, an error was identified in the 2009 “Pay by Phone” transaction count. The 2009 recorded “Pay by Phone” transactions reported in Table SCG-EF-15 on p. EF-36 of Exhibit SCG-07-R has changed from 242,926 to 244,806 (the sum of the transactions per day in 2009). This change has no impact on the Customer Contact Center forecast. However, SoCalGas will address this error at the next available opportunity.

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16. Please provide all available data on worker turnover among full-time and part-time CSRs for 2007-2010.

**SoCalGas Response:**

The following table provides the full-time and part-time CSR turnover (CSRs leaving the customer contact center) for years 2007 through 2010.

CSR Turnover - In Headcount			
Year	Full-time	Part-time	Total
2007	49	48	<b>97</b>
2008	20	29	<b>49</b>
2009	12	27	<b>39</b>
2010	33	21	<b>54</b>

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DATE RESPONDED: AUGUST 12, 2011**

17. Re Workpapers 117-119 (Branch Offices):

- a. Please provide the status of FACTA Red Flag Implementation in 2010. When was it implemented? What was the incremental cost of FACTA Red Flag Implementation in 2010?
- b. How many extra security guards were hired in each month of 2010?
- c. Were the branch office positions fully staffed in 2010 as forecast?
- d. How many vacancies did SoCal have in branch office positions in 2008, 2009, and 2010?

**SoCalGas Response:**

- a. FACTA Red Flag rules were implemented in the branch offices on November 2, 2009. The incremental cost in 2010 associated with the implementation was \$119,000.

SoCalGas had initially planned on implementation of the Red Flag rules to authorized pay locations (APLs). However, because of concerns with customer information security and with customers sharing personal information with non-company employees, APLs were not included in the FACTA Red Flag implementation. SoCalGas is investigating other avenues for customers to provide identity validation.

- b. A total of six additional security guards were hired in 2010 to support the branch office operations. One security guard was hired in February, three were hired in August, one was hired in September and one was hired in October.
- c. No, the branch offices were not fully staffed in 2010 as forecast. Workforce variance was due to cyclical vacancies, long-term disabilities, and eleven temporary office closures associated with accessibility compliance.
- d. Based upon staffing requirements of the given year, branch office vacancies for years 2008 through 2010 are as follows:

Branch Office Vacancies In FTEs		
Staffing		
Year	Requirements	Vacancies
2008*	127.9	0.0
2009	134.2	5.0
2010	136.4	5.0

\* 2008 staffing requirements assumed CPUC authorization of some branch office closures as requested in 2008 GRC which was ultimately denied