

**ORA DATA REQUEST  
ORA-SCG-DR-080-LJL  
SOCALGAS 2016 GRC – A.14-11-004  
SOCALGAS RESPONSE  
DATE RECEIVED: FEBRUARY 24, 2015  
DATE RESPONDED: MARCH 11, 2015**

**Exhibit Reference:** SCG-23

**Subject:** General

**Please provide the following:**

1. For all departments and/or divisions in Ex. SCG-23, where SCG has requested increased staffing, please provide copies of all studies and/or workload analyses used to develop each of SCG's increased staffing forecasts. If no such studies or analyses were conducted, please so state, and explain why SCG believed it was not necessary to conduct such studies or analyses to support their forecasts for increased staffing.

**SoCalGas Response:**

Please note that "FTE's" are not hired as they do not represent headcount. "Headcount", or staffing, does not equal "Full Time Equivalent (FTE)". An FTE position is an indication of activity level and not a specific headcount in any given year. In some cases headcount may be less than the FTE count. For example, the activity level driving the forecasted incremental FTE in an operational area may ultimately be performed using internal labor, outside contractors, overtime or a mix of each. In other cases, headcount may be more than the FTE count if the positions are filled with part-time employees.

SoCalGas does prepare a forecast of "Headcount" which is used for forecasting Employee Benefits only. Headcount forecast encompasses all employees, including those whose work responsibilities are included in the GRC, as well as those whose duties are related to a Refundable program or other functional area with costs approved through a non-GRC proceeding. Headcount is not used in the operating areas to forecast cost. Therefore, it would be incorrect to say that forecasted FTE's are hired or that an increase in FTE's means a direct increase in staffing.

Given that clarification, SoCalGas has requested increased FTE's in the following areas:

**a) Performance Management & Organizational Strategy - Continuous Improvement & Operations Research**

From the testimony of SoCalGas witness Mark Serrano: *"Within the operations research discipline, a person who in 2013 devoted a significant portion of his time to refundable programs will be working on O&M projects and an additional Business Systems Analyst position will be created and staffed."*

A description of the job responsibilities of the Operations Research Analyst and Operations Research Manager positions were submitted to ORA in response to **ORA ORAL-SCG-DR-002-LJL**, Question 02.

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**Response to Question 1 (Continued)**

**b) HR Services - Workforce Readiness**

From the testimony of SoCalGas witness Mark Serrano: *“HR Services will augment its existing staff with a Workforce Readiness Advisor to drive and manage this effort. The Advisor will collaborate with local communities to identify and train potential candidates for highly skilled trades and work closely with community-based agencies, workforce investment boards, community colleges, and high schools to ensure curriculum and training programs are ready to prepare young adults to work in the utility industry... This position will also be involved in implementing processes to verify that skill and competency requirements are met during hiring and training.”*

A description of the job responsibilities of the Workforce Readiness Advisor position was submitted to ORA in response to **ORA ORAL-SCG-DR-002-LJL**, Question 03.

**c) HR Services - Workforce Planning**

From the testimony of SoCalGas witness Mark Serrano: *“To assist in workforce planning, the HR Services department plans to add two additional staff positions...”* Both the Workforce Planning positions described here and the Staffing Advisor positions described in section (d) below are needed to address anticipated increases in workforce attrition and hiring due to retirement. Attached (see “ORA-SCG-DR-080-LJL Q1C Attachment.pdf”) is an analysis performed to forecast the workforce turnover due to retirements:

A description of the job responsibilities of the two Workforce Planning Advisor positions was submitted to ORA in response to **ORA ORAL-SCG-DR-002-LJL**, Question 03.

**d) HR Services - External Staffing**

From the testimony of SoCalGas witness Mark Serrano: *“The entry-level position within the SCG field operations has historically been that of a meter reader. With automation of the meter reading function via AMI, HR Services will no longer recruit, test, screen and staff these positions. The costs to perform these functions for the meter reader position were included in the AMI business case and are scheduled to be eliminated. To recruit, test, screen and ultimately staff new entry-level positions, two additional staff personnel will be required.”*

See the analysis performed to forecast the workforce turnover due to retirements in section (c) above. A description of the job responsibilities of the two Staffing Advisor positions was submitted to ORA in response to **ORA ORAL-SCG-DR-002-LJL**, Question 03.

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**Response to Question 1 (Continued)**

**e) Labor Relations - CBA Negotiations**

From the testimony of SoCalGas witness Mark Serrano: *“During 2015, SCG will conduct CBA negotiations with its labor unions. During this period, additional workforce support will be required to prepare negotiations materials and assess proposals received from its unions. The CBA negotiations process did not occur in Base Year – 2013... The CBA period is expected to span a period of three years, with the next CBA negotiations taking place in 2018. The TY2016 request is based upon a three-year average...”*

A description of the job responsibilities of the Labor Relations Advisor position was submitted to ORA in response to **ORA ORAL-SCG-DR-002-LJL**, Question 04.

**f) Labor Relations - Labor Relations Advisor**

From the testimony of SoCalGas witness Mark Serrano: *“The Labor Relations department has historically maintained a significant backlog of grievance and arbitration cases awaiting resolution. To expedite the decision-making process and resolve longstanding issues, the department increased its staffing by one position.”*

A description of the job responsibilities of the Labor Relations Analyst position was submitted to ORA in response to **ORA ORAL-SCG-DR-002-LJL**, Question 04.

**g) Organizational Effectiveness - Workforce Knowledge Transfer**

From the testimony of SoCalGas witness Mark Serrano: *“To centrally plan and manage the knowledge transfer for key positions throughout the SCG organization, the Organizational Development department will increase its staffing by one position.”*

The need for SoCalGas to address workforce knowledge transfer challenges was summarized in a report prepared by an internal cross-functional team in 2013. The presentation developed by that team is in the attachment, “ORA-SCG-DR-080-LJL Q1G Attachment (C) REDACTED.pdf”. This attachment is **Confidential pursuant to P.U. Code Section 583 & G.O. 66-C** as it includes information that, if shared, would violate affiliate rules. It is also redacted to remove specific employee names.

The Knowledge Transfer Advisor position will help SoCalGas address anticipated increases in workforce attrition and hiring due to retirements. See the analysis performed to forecast the workforce turnover due to retirements in section (c) above.

A description of the job responsibilities of the Knowledge Transfer Advisor position was submitted to ORA in response to **ORA ORAL-SCG-DR-002-LJL**, Question 05.

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**h) Organizational Effectiveness - Employee Development**

From the testimony of SoCalGas witness Mark Serrano: *The curriculum and training for new supervisors within the company was dated and required improvement. The program was enhanced and re-launched in 2014. Follow-up coaching and training for the participants became an integral part of the leadership development program and is expected to continue. To accelerate the development of key managers and directors within SCG, the Organizational Development department will build a key manager and director development program. The program will be integrated with other development assignments and succession planning activities. To augment these efforts, external professional development programs will be used to extend the capabilities of high potential (executive potential) leaders.*

A description of the job responsibilities of the Employee Development Advisor position was submitted to ORA in response to **ORA ORAL-SCG-DR-002-LJL**, Question 05.

**i) Safety, Wellness & Disability Services - Safety Committee Member Training**

From the testimony of SoCalGas witness Mark Serrano: *“The first safety program enhancement involves the roll-out of safety committee member training to prepare safety committee members to better influence safety culture. The focus of this training is to enhance the skills of safety committee members so safety improvement projects and person-to-person interaction are more effective.”*

The justification for the training and the methodology used to forecast the increased staffing (2.1 FTEs), was described to ORA in the SoCalGas response to **ORA ORAL-SCG-DR-002-LJL**, Question 06.

**j) Safety, Wellness & Disability Services - New Hire Defensive Driver Training**

From the testimony of SoCalGas witness Mark Serrano: *“The second safety program enhancement involves defensive driver training for new-hire employees. Currently, new hire employees undergo one full day of defensive driver training when they first enter the Company, then received periodic coaching. When new hires move to other positions, they may receive an additional day of defensive driver training, followed by periodic coaching. SCG plans to expand the existing one-day defensive driver training course to three days.”*

The justification for the new hire defensive driver training, and the methodology used to forecast the increased staffing (3.0 FTEs), was described to ORA in the SoCalGas response to **ORA ORAL-SCG-DR-002-LJL**, Question 06.

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**k) Safety, Wellness & Disability Services - Defensive Driver Refresher Training**

From the testimony of SoCalGas witness Mark Serrano: *“The third safety program enhancement involves augmenting defensive driver coaching with “refresher” training that focuses upon defensive driving principles and application of those principles while operating a motor vehicle. The “refresher” course is currently envisioned to include eight hours of in-vehicle demonstration, practice (with coaching and feedback) and an in-vehicle test to confirm knowledge transfer and skill acquisition. All field personnel who are assigned use of a company vehicle will undergo eight hours of “refresher” training annually.”*

The justification for the defensive driver refresher training, and the methodology used to forecast the increased staffing (33.2 FTEs), was described to ORA in the SoCalGas response to **ORA ORAL-SCG-DR-002-LJL**, Question 06.

**l) Safety, Wellness & Disability Services - New to Supervision – Safety Essentials**

From the testimony of SoCalGas witness Mark Serrano: *“The fourth safety program enhancement is an in-depth safety orientation for people who are new to supervision. The course covers topics from SCG’s Injury and Illness Prevention Plan, including an in-depth orientation to supervisor responsibilities and employee responsibilities. New supervisors will also learn about incident investigation techniques, job observation and coaching techniques, safety management systems and incident reporting.”*

The justification for the new to supervision safety training (Safety Essentials Course), and the methodology used to forecast the increased staffing (1.1 FTEs), was described to ORA in the SoCalGas response to **ORA ORAL-SCG-DR-002-LJL**, Question 06.

**m) Safety, Wellness & Disability Services - Field Safety Advisor**

From the testimony of SoCalGas witness Mark Serrano: *“Prior to CPUC approval of Application No. 08-09-023 (AMI) and the subsequent deployment of Advanced Meters, the Safety staff included five Field Safety Advisors. Approximately one Field Safety Advisor Full-Time Equivalent employee was allocated to support the meter reading organization. In the Advanced Metering Infrastructure benefits, SCG committed to eliminating one Field Safety Advisor position. This position was eliminated in late 2012, when the deployment of Advanced Meters was initiated. Because the labor (and associated non-labor) was not included in Base Year 2013 costs, and will be removed from SCG authorized O&M, it is being added back into TY2016 costs.”*

The justification for the Field Safety Advisor position and the methodology used to forecast the increased staffing (1.0 FTE), was described to ORA in the SoCalGas response to **ORA ORAL-SCG-DR-002-LJL**, Question 06.

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**n) Safety, Wellness & Disability Services - EAP and Wellness Operations Staffing**

From the testimony of SoCalGas witness Mark Serrano: *“Regulatory changes impacting company oversight of contractor adherence to DOT drug testing program requirements have been increasing. The workload associated with monitoring and reporting contractor DOT drug testing activities will increase the Wellness work unit staff by one analyst position in 2015. Similarly, the Federal Motor Carrier Administration regulations now require increased oversight of employees who must possess a Commercial Driver’s License to perform their job at SCG. To provide this oversight, the Wellness work unit will increase staff by one analyst position in TY2016. This position is also expected to be assigned responsibility for implementing a Department of Motor Vehicle Pull-Notice program for SCG. Finally, the Wellness work unit will be increasing its staffing by one position to assist in promoting topics that can impact employee safety and prevent employee illnesses and injuries within SCG. This position may also assist in management of cases involving employee use (or abuse) of prescription drugs.”*

The justification for the Wellness Specialist positions (3.0 FTEs), was described to ORA in the SoCalGas response to **ORA ORAL-SCG-DR-002-LJL**, Question 06.

**o) Safety, Wellness & Disability Services - Employee Care Services Staffing**

From the testimony of SoCalGas witness Mark Serrano: *“The Employee Care Services work unit within the Safety, Wellness and Disability Services function is currently staffed with 34 employees...”*

The justification for the Employee Care Services positions (3.0 FTEs), was described to ORA in the SoCalGas response to **ORA ORAL-SCG-DR-002-LJL**, Question 06.