

PACIFIC GAS AND ELECTRIC COMPANY
Energy Efficiency 2018-2025 Rolling Portfolio Business Plan
Application 17-01-015
Data Response

PG&E Data Request No.:	ORA_04-Q014-Q019		
PG&E File Name:	EnergyEfficiency2018-2025-RollingPortfolioBusinessPlan_DR_ORA_04-Q014-Q019		
Request Date:	May 22, 2017	Requester DR No.:	PGE004
Date Sent:	June 23, 2017	Requesting Party:	ORA (Office of Ratepayer Advocates)
PG&E Witness:	Sean Mackay	Requester:	Daniel Buch

SUBJECT: DATA REQUEST No. ORA-A1701013- PGE004. (ORA_04)

ACCOUNT REPRESENTATIVE EMPLOYEES (FTE AND HEADCOUNT) AND COSTS

QUESTION 14

Provide (in tabular form) the total number of account representatives in the organization and the account representative FTEs funded by energy efficiency balancing accounts, for each month for the years 2014-2017 (year-to-date).

ANSWER 14

PG&E is providing the total number of account representatives in the organization and the account representative FTEs funded by energy efficiency balancing accounts, for each month for the years 2014-2017 (Year-to-Date April).

Refer to **Atch06_ORA_DR-04_ARFTEHC.xlsx_Q14**

QUESTION 15





Describe the method used to determine the amount of account representative costs charged to energy efficiency balancing accounts for the years 2014-2017.

ANSWER 15

The method used to determine the amount of account representative costs charged to energy efficiency balancing accounts for the years 2014 – 2017 starts when we create standard rates for the organization. These rates are driven by a calculation comprising of employee compensation and employee related costs that we plan for each organization. The charge attributable to each representative is a uniform blended rate. As account reps perform Energy Efficiency activity, they charge their time to Energy Efficiency orders based on this standard rate. (For example, standard rate may be \$100/hour. An account representative may work on energy efficiency for 2 hours. \$200 will be incurred to energy efficiency). Attached is the time charging guidelines that

direct account reps to charge Energy Efficiency appropriately. These guidelines clearly outline what is to be charged to Energy Efficiency and what shouldn't.

Refer to **Atch07_ORA_DR-04_Timekeep.zip_Q15_Q16** which includes the following:

-  2014 CMT Timekeeping Governance.doc
-  2015 Timekeeping Guidelines.docx
-  2016 Timekeeping Guidelines BES - v1.2 (2).docx
-  2017 Timekeeping Guidelines BES - v1.0.docx

QUESTION 16

State the basis for the method used to determine the amount of account representative costs charged to energy efficiency balancing accounts for the years 2014-2017.

ANSWER 16

See Response to Question 15, which is incorporated by this reference.

QUESTION 17

Provide all analyses and reports used to determine the amount of account representative costs charged to energy efficiency balancing accounts for the year 2014-2017.

ANSWER 17

See response to Question 1, which is incorporated by this reference. The Account Representative/Sales organization's costs can be found in the "Charge In Organizations" section, under the following names: Energy Solutions & Services (ES&S), Business Impact, Customer Impact, Business Energy Solutions (BES), Local Customer Experience (LCE), and Sales Ops / Business Operations.

QUESTION 18

Describe the approval process used in determining the amount of account representative costs charged to energy efficiency balancing accounts.

ANSWER 18

The approval process used in determining the amount of account representative costs charged to Energy Efficiency balancing accounts starts with the EE goals set by the CPUC. Once the EE goals are set, Finance works with Energy Efficiency leadership to determine the funding and FTEs needed to meet these goals. Through the internal budgeting process, the Director of Energy Efficiency Portfolio Management approves

funding for Account Representatives to charge EE Balancing Account. Supervisors review weekly time sheets and approve time charged to EE.

QUESTION 19

Provide written copies of all approvals for the allocation of account representative costs charged to energy efficiency balancing accounts, in force during the period 2014-2017.

ANSWER 19

PG&E has approved timesheets for these employees who bill to the EE balancing accounts, but the production of such documents would be unduly burdensome.

Enclosed Attachment (s):

