

CANADIAN OFFICE AND PROFESSIONAL EMPLOYEES UNION, LOCAL 378 (aka Movement of United Professionals or MoveUP)

INFORMATION REQUEST No.1 TO FORTISBC INC.

FortisBC Inc.

Multi-Year Performance Based Rate making Plan for 2014 through 2019

Annual Review for 2017 Rates

1.0 Reference: **Exhibit B-2, Section 1.4.2 Initiatives Undertaken, pp 4-5**

Electric Customer Service Calls

As of June 30, to date in 2016, staff in the Prince George contact centre answered approximately 3,200 electric calls, reflecting about 3 percent of the total electric calls received. Although this reflects a relatively small percentage of the total electric calls, use of the Prince George staff reduced the need for staffing at peak times at FBC's Trail contact centre and at the same time ensured that service levels were met. The Prince George staff can answer these calls when there are lower volumes in the gas customer service queue. As a result of this change, Prince George staff had an opportunity to learn more about the electric operations and to have more diverse work. Six fewer Customer Service Representatives (CSRs) are required as compared to having all calls answered in Trail, while maintaining service levels to customers.

Gas Billing Error Corrections

In 2015, six billing analyst roles that were vacant in FEI's Burnaby office were filled by FBC in its Trail office, providing a new opportunity for the six CSRs no longer required as a result of the changes described above. These employees have been in customer service for many years handling customer service calls and billing work related to electric bills. In the ten years since the Trail contact centre opened, there have been very few development opportunities available there and the integration of this work provided a development opportunity for employees in Trail. In 2016, the Trail employees that are performing the gas billing work have been able to find efficiencies in the work and maintain service levels that were in place prior to the transition.

In total, the integration of activities is forecast to produce annual savings for FBC in the amount of \$0.317 million.

- 1.1 Please confirm that the FEI employees referenced above performing FBC work include Customer Service Representatives (CSR's), Senior Customer Service Representatives (SCSR's), and Customer Service Leaders (CSL's).
- 1.2 Please confirm as of August 31, 2016 how many of these FEI employees are assisting Electric Operations (FBC) in this manner?
- 1.3 Please provide the job title, workplace location or locations of FEI employees engaged in assisting Electric Operations and the number of employees engaged in this work at each physical location.
- 1.4 Please confirm that the map below (found at <https://www.fortisbc.com/About/ServiceAreas/Pages/default.aspx>) accurately reflects the location of the FBC service area in relation to FEI's various customer service locations.

Service areas

We provide natural gas, electricity and piped propane to homes and businesses across the province.

Together, our gas and electricity utilities deliver over 21 per cent of total energy consumed in BC and serve more than 1.1 million customers in 135 communities.



- 1.5 Please confirm that these FEI employees now receive schedules indicating when they are required to perform work on behalf of FBC customers.

- 1.6 Please confirm that during those scheduled shifts, these FEI employees do work on behalf of electric customers only.
- 1.7 Please provide for the evidentiary records, a table listing for each calendar month since August 2015 the number of times the FEI employees listed in 1.2 have been scheduled to perform FBC work (by job title), the total number of hours those employees have been scheduled to perform FBC work, the number of FBC transactions completed (if applicable), and the associated Cross Charges to FBC through the Company's intercompany allocation process.
- 1.8 Please confirm whether FEI is currently calculating the cross charges associated with these FEI workers performing FBC work on an hourly or per transaction basis. Please list all positions whose work is charged to FBC on an hourly rate and all positions whose work is charged to FBC on a per transaction basis.
- 1.9 Please describe the nature of the calls the gas CSR's take from FBC customers. (i.e. billing disputes, emergency service calls, calls from contractors, etc.)
 - 1.9.1 Are there certain kinds of FBC calls not routed to FEI Employees? If so, please describe the nature of those calls and why they are not routed to FEI employees.
- 1.10 What, if any, training has been provided to these gas CSR's to facilitate their provision of these services to FBC customers? Please provide the date, subject matter, and duration of each training module or session.
 - 1.10.1 Please confirm whether this training mirrors exactly the training provided to FBC employees performing the same or similar work. If not, please specifically describe the differences in the training.
 - 1.10.2 Has FBC provided these FEI employees with all the same resources and job supports that are available to FBC employees performing the same or comparable work? If so, please provide a full listing and description of those resources. If not, please explain why not.
- 1.11 What, if any training has been provided to these gas SCSR's, CSL's, and collection representatives to facilitate their provision of these services to FBC customers? Please provide the date, subject matter, and duration of each training module or session.
 - 1.11.1 Please confirm whether this training mirrors exactly the training provided to FBC employees performing the same or similar work. If not, please specifically describe the differences in the training.
 - 1.11.2 Has FBC provided these FEI employees with all the same resources and job supports that are available to FBC employees performing the same or

comparable work? IF so, please provide a full listing of those resources and job supports. If not, please explain why not.

1.12 Reference: COPE378 IR 1.0 TOPIC 2.0 From FortisBC Energy Inc. Annual Review of 2016 Rates Customer Service – Provision of Services to FortisBC Inc. Exhibit B-9

September 09, 2015 Email from FEI Manager Lori Harris to FEI Customer Contact Centre Staff:

In January of this year we started using some of our gas CSR's from the Prince George contact centre to assist our electric operations with call volume peaks. This has been very successful in helping us achieve our SQI targets that were set as part of the Performance Based Ratemaking (PBR) decision. We would like to continue to build on this experience by having our electric resources start to support gas operations where gas needs additional support.

The TCC has many long term and experienced employees well positioned to help support our gas operations. We believe that the implausible cases in billing production are a good candidate for this support as it is highly seasonal and fluctuates often requiring a larger pool of resources to support it at various times and it is a function with a high level of overlap in both electric and gas billing knowledge and experience.

In order to support this we will be posting 6 one year temporary positions at the TCC:

- o One Billing Leader
- o 5 Billing Analysts

Additional resources in our gas operations will be trained to take electric calls to offset the loss of the 6 resources at the TCC. The billing leader will be trained on the processes first and will then help support the training of the new billing analysts once in place. After the first 6 months we will evaluate the support plan and look to make changes to it if required.

The key objective of this change is to work together to provide additional support and flexibility during seasonal peaks for all types of work while maintaining service levels and the SQI levels that we have committed to.

If you have any questions please don't hesitate to speak to your manager.

Thank you.

- 1.12.1 In response to COPE IR 12.2 in the Annual Review of 2016 Rates, FBC indicated that," As of September 28, 2015, one position has been posted at the TCC to support FEI's gas operations. This is the Billing Leader position described in the email above." (Exhibit B-6, page 24)

Please confirm whether, as of August 31, 2016, the 6 positions referenced in this email have been filled.

- 1.12.2 Please confirm that the 6 positions listed above (1 Billing Leader and 5 Billing Analysts) are those referenced on page 5 of the 2017 Annual Review Application as providing service to FEI performing "Gas Billing Error Corrections" work.
- 1.12.3 When do each of the one year temporary terms for the 6 positions referenced above expire?
- 1.12.4 Please confirm whether FBC intends to renew these temporary positions upon their expiry.
- 1.12.5 Please confirm whether FBC has or intends to make these positions permanent.
- 1.12.6 Please provide the workplace location of each of these 6 positions.
- 1.12.7 Please confirm that these FBC employees are scheduled to do work on behalf of FEI customers only.
- 1.12.8 Please provide for the evidentiary record, a table listing for each calendar month since August of 2015, the number of hours these FBC employees have worked, the total number of FEI transactions completed, and the Cross-Charges charged to FEI through the Company's intercompany allocation process.
- 1.12.9 Please confirm whether FBC is currently calculating the cross-charges associated with these FBC workers performing FEI work on an hourly or per transaction basis.
 - 1.12.9.1 Does the amount charged to FEI capture **all** expenses associated with employing these 6 individuals? (including but not limited to vacation time, medical and dental benefits, training, etc.)
 - 1.12.9.2 If not, please explain why FBC is not recovering all the expenses associated with these employees from FEI.

1.13 Reference: FEI Collections Representatives

- 1.13.1 Please confirm whether between August 2015 and now, FEI Collections Representatives are or have been performing FBC work.
- 1.13.2 Please indicate where in the FBC Application this cross-utility work is detailed and described for Intervenors and the Commission.
- 1.13.3 If the utility has not already done so, please provide the job titles and workplace locations of the FEI Collections Representatives who have performed work on FBC's behalf.

- 1.13.4 Please confirm the number of FEI Collections Representatives who have performed work on FBC's behalf.
 - 1.13.5 Please indicate whether these FEI employees received schedules indicating when they are or were required to exclusively perform FBC work or whether they provide or provided service to FBC exclusively at all times.
 - 1.13.6 Please provide for the evidentiary record, a table listing by calendar month from August 2015 to present, the number of FEI Collections Representatives who have performed FBC work, the number of times FEI Collections Representatives have been scheduled to perform FBC work, the total number of hours FEI CR's have spent completing FBC work, the total number of FBC transactions completed by FEI CR's, and the associated Cross Charges allocated to FBC by FEI through the intercompany allocation process.
 - 1.13.7 Please confirm whether FEI calculated the cross charges associated with these FEI workers performing FBC work on an hourly or per transaction basis.
- 1.14 Please provide the allocation of rate base associated with the Customer Service Centres as between FortisBC Energy Inc. and FortisBC Inc. in both dollar and percentage terms.

2.0 Reference: Exhibit B-2, Section 1.4.2 Initiatives Undertaken, Training and Development, Page 5

The Training and Development Initiative was implemented in 2015 and introduced a company-wide process that improves the ability of the Company to plan and track required training activities, ensuring skills requirements for employee training are addressed efficiently and effectively. All departments are now able to evaluate more effectively the training requirements specific to their group. Further work is being undertaken in 2016 to refine training and competency requirements for individual roles. There are no O&M savings anticipated.

- 2.1 Please confirm whether the Training and Development Initiative has identified safety-related training needs and opportunities.
- 2.2 Please confirm whether the FEI employees providing service to FBC and its customers are included in this process or benefit from the additional training provided to their FBC counterparts.
 - 2.2.1 If not, why not?
- 2.3 In response to COPE IR 1.1 through 1.6 (Exhibit B-6, pages 1-3) in the FBC Annual Review for 2016 Rates Process, FBC provided responses to various questions regarding this

Initiative. At the time, many aspects of the initiative remained undefined so FBC was unable to provide answers. MoveUP now asks FBC to answer those questions (as listed below)

2.3.1 Does this Training and Development Initiative remain a joint project between FBC and FEI?

2.3.2 What are the associated costs of this joint project thus far? What are the projected costs of this joint project?

2.3.3 In response to COPE IR 1.3 which asked, "How are these costs being allocated between the two utilities?" FBC responded, "To prevent cross-subsidization between FEI and FBC, shared costs will be identified and billed appropriately."

Please describe how FBC and FEI have identified and billed this initiative's costs.

2.3.4 How does this allocation prevent cross-subsidization between FEI and FBC?

2.3.5 In the 2016 Annual Review, FBC indicated that it was unable to provide any projected O&M savings from this initiative for future years because it was still in the implementation phase and in this application, FBC has stated it does not anticipate any O&M savings. Please clarify whether FBC is unable to calculate any O&M savings at this time for whatever reason or if the utility does not expect any to result from this initiative at any point.

3.0 Reference: Staffing Levels

3.1 Please provide a table showing FBC's Headcount and FTE's at Year-End 2013, 2014, 2015, the Projection for 2016, and its actuals as of August 31, 2016.

3.2 Please provide a breakdown of the five sets of Headcount and FTE figures in the table generated in response to COPE IR 3.1 to show how many of each were/are/are projected to be COPE378 members, IBEW members, and Management and Excluded (M&E).

4.0 Reference: August 12, 2016 Email from FEI Manager Lori Harris to FEI Customer Contact Centre Staff:

From: Harris, Lori

Sent: Friday, August 12, 2016 1:16 PM

To:

Subject: CIC Go Live This Weekend at the TCC

Hi everyone,

Over the weekend the Trail Contact Centre will be going live with CIC which means Trail, Prince George and Willingdon Park will now all be on the same phone system! The Avaya phone system will no longer be used to take electric calls.

What does this mean for you?

As of Monday morning, when you are scheduled to take electric calls you will **NO** longer have to do the following:

Log into your Avaya Phone

Change your CIC stats to “Electric No ACD”

No longer have to use a separate headset

Workforce will now have the ability to put you in the electric queue when your scheduled time to take electric call happens. You will however still have to log into CIS prior to taking calls. Once you are in the electric queue, you will receive electric calls and use CIC the same as you do for gas calls. For example you will set your status to Available when you are ready to take calls and you will transition into follow up when your call is disconnected. When you receive the wrap code pop up it will have all the electric wrap codes that you use today.

To ensure you are ready the RTM will be pinging you when they move you into the electric queue. Since you will be no longer using your Avaya phone we will have them removed off your desk in the next few weeks.

Your manager will be available for you to assist in the transition if you have any questions.

Thanks

Lori

Lori Harris
FortisBC
Manager, Customer Operations and Contact Centres

(please note this email has been altered to redact the names of the FEI employees and groups who received this email as well as Ms. Harris' email, cell, and work telephone numbers. The text of this email is otherwise unaltered.)

- 4.1 Please confirm that the change in the phone systems referenced in this email took effect on Monday, August 15, 2016.
- 4.2 Please confirm that FEI employees scheduled to take FBC calls prior to August 15, 2016 had to use and log into a separate, hard wired phone system and use a separate telephone headset while performing this work than they used while performing work on behalf of FEI customers.
 - 4.2.1 Please indicate which utility bore the cost of all additional equipment used by FEI employees to facilitate their work on behalf of FBC customers since the program pilot began.
 - 4.2.2 What costs were associated with this additional equipment?

4.2.3 What costs (if any) were associated with the equipment transition referenced in this email?

4.2.3.1 If there were costs, which utility paid for them or please explain how the costs were allocated as between the two utilities?

4.2.4 Please confirm that FEI employees will still be required to log into a separate CIS (computer) system before they can begin their scheduled work taking calls from FBC customers.

5.0 Reference: **BC Hydro Filing of Consolidated Information, BC Hydro Inquiry of Expenditures SAP Platform**
Exhibit B-3, page 10

► SAP is the world's largest enterprise software vendor and the third largest global software vendor. It is headquartered in Walldorf, Germany, and has 310,000 customers in 190 countries.²¹ SAP is the leading ERP within the utilities sector, with 4,200 customers in 118 countries, and there have been many successful deployments. Of these customers, 2,000 utilities run ERP and/or Customer Relationships & Billing. SAP is used for ERP functions by most regulated utilities in Canada, including FortisBC, TransAlta, SaskPower, Manitoba Hydro, Hydro One, Hydro Quebec and NB Power.²²

5.1 Please confirm that FBC uses the Systems, Applications and Products (SAP) system for its Enterprise Resource Planning (ERP) and data management functions.

5.2 Please confirm whether FEI also uses the SAP system for its ERP and data management functions.

5.2.1 If so, do the FEI and FBC SAP systems communicate at all? If so, please describe the degree of integration and/or intersystem communication that takes place.

5.2.2 If not, are there plans to integrate or interconnect these two utilities' SAP platforms in the future?

5.2.3 Please indicate what work was undertaken and costs (if any) FEI or FBC incurred to modify their respective SAP platforms to accommodate the cross-utility work currently performed by FEI CSR's, FEI SCSR's and FBC Billing Analysts?

5.2.3.1 To which utility or utilities are those costs (if any) being charged?

5.3 Please confirm what aspects of FEI's CSR's and SCRC's work are tracked using the SAP for performance reviews and/or enforcement of FBC or FEI company policies.

- 5.3.1 If the SAP platform is not used to track FEI's CSR's and SCSR's work performance and compliance with any and all FBC or FEI policies when performing FBC work, please specify all tools, staff time or programs that are used, their associated costs, their cost allocations as between the utilities, and their purposes.
- 5.4 Please confirm what aspects of FBC's 6 Billing Analysts (1 billing leader plus 5 analysts) are tracked using the SAP for performance reviews and/or enforcement of FBC or FEI company policies.
- 5.4.1 If the SAP platform is not used to track FBC's Billing Analysts' work performances and compliance with any and all FEI or FBC policies when performing FEI work, please specify all tools, staff time, or programs that are used, their associated costs, their cost allocations as between the utilities, and their purposes.

6.0 Reference: Service Quality Indicators
Exhibit B-2, Section 13.2.1 Safety Service Quality Indicators, Emergency Response Time, Table 13-2, page 105

Table 13-2: Historical Emergency Response Time

Description	2009	2010	2011	2012	2013	2014	2015	June 2016 YTD
Results	92%	95%	92%	91%	94%	91%	92%	98%
Benchmark	n/a	n/a	n/a	n/a	n/a	93%	93%	93%
Threshold	n/a	n/a	n/a	n/a	n/a	90.6%	90.6%	90.6%

- 6.1 Please provide an updated Emergency Response Time SQI Table 13-2 also providing figures current to August 31, 2016.
- 6.2 At lines 17 through 21 of page 104, FBC stated,
- “The 2015 result was 92 percent which was within the performance range with the benchmark at 93 percent and the threshold at 90.6 percent. The 2015 result was impacted by widespread outages due to a windstorm in June, and higher trouble call volumes in July and August. The June 2016 year-to-date result is 98 percent, which is better than the benchmark level set at 93 percent.”
- Please comment on whether FBC views the band between the Commission approved TSF Benchmark and Threshold as the point at which it is no longer required to examine whether further improvements to its TSF performance could be made to improve public safety.
- 6.3 Please indicate at what point (TSF percentage) FBC has or will cease to seek opportunities to improve its TSF (Emergency) performance metrics?

- 6.4 Please list all efforts FBC has made since the beginning of the current PBR period to identify cost-effective means to further improve its TSF (Emergency) performance.

7.0 Reference: **Service Quality Indicators**
Exhibit B-2, Section 13.2.1 Safety Service Quality Indicators, All Injury Frequency Rate, pp 105-7

7.1

Table 13-3: Historical All Injury Frequency Rate Results

Description	2009	2010	2011	2012	2013	2014	2015	June 2016 YTD
Annual Results	1.41	1.72	1.48	1.72	2.82	3.21	1.54	0.88
Three year rolling average	2.00	2.00	1.54	1.64	2.01	2.58	2.52	1.88
Benchmark	n/a	n/a	n/a	n/a	n/a	1.64	1.64	1.64
Threshold	n/a	n/a	n/a	n/a	n/a	2.39	2.39	2.39

Please update this table (still including the June 2016 year-to-date figure) with the AIFR results updated to August 31, 2016.

- 7.2 Please prepare a table describing each of the injuries recorded to in the second half of 2015 and to August 31, 2016, setting out:

- Date
- Work Location
- Bargaining Unit (if any) of the Injured Employee
- Nature of the Injury
- Work days lost (if any)
- Confirmation that the Injured Employee has Returned to Work

- 7.3 Please provide the FBC Occupational Health and Safety Department's actual/projected operating expenses for 2011 through to the present, including 2016's projected annual spend as well as the Year to Date figure current to August 31, 2016.

7.4

As a part of the Company's focus on continual improvement, FBC launched the Target Zero safety program in January 2016. This program provides a structured format for employees at all levels to participate in corporate safety, enabling the Company to better understand the current state of the safety culture and prioritize and implement initiatives that are relevant to employees. Aspects of the program include:

- 7.4.1 In response to COPE IR 1.9.2 in the Annual Review of FBC's 2016 Rates, the utility indicated that it was planning to spend an incremental \$195 thousand O&M in support of the Target Zero program. (Exhibit B-6, page 18) Has FBC modified that planned spending amount in the interim? If so, please provide the revised figure with an explanation as it was changed.
- 7.4.2 Please provide the costs FBC has incurred planning and then implementing the Target Zero program to August 31, 2016.
- 7.4.3 Please confirm that this figure represents only those costs incurred on behalf of or allocated to FBC.
- 7.5 Does FBC attribute its improved AIFR performance to the Target Zero safety program? If so, please provide any evidence that FEI has of a link between Target Zero and its improved AIFR on the record.
- 7.6 Please File the Utility's Corporate Scorecards for F2014, 2015, and 2016.
- 7.7 Please confirm that the 2016 AIFR Target was set using the average AIFR for the three previous years (2013, 2014, and 2015).
- 7.8 Please confirm whether the All Injury Frequency Rate remains tied to M&E Bonuses?
- 7.8.1 If so:
- i) what is the current AIFR required to trigger bonuses?
 - ii) what is the cumulative financial impact on bonuses for a failure to achieve that trigger figure?
- 7.8.2 If not, please explain why the utility has divorced M&E bonuses from the AIFR going forward?

**8.0 Reference: Service Quality Indicators
Exhibit B-2, Section 13.2.2 Responsiveness to Customer Needs Service Quality Indicators, First Contact Resolution**

Table 13-4: Historical First Contact Resolution Levels

Description	2009	2010	2011	2012	2013	2014	2015	June 2016 YTD
Annual Results	n/a	n/a	n/a	n/a	73%	73%	76%	77%
Benchmark	n/a	n/a	n/a	n/a	n/a	78%	78%	78%
Threshold	n/a	n/a	n/a	n/a	n/a	72%	72%	72%

- 8.1 Please update this table (still including the June 2016 year-to-date figure) with the First Contact Resolution results updated to August 31, 2016.

- 8.2 Please confirm whether FBC or a third party conducts First Contact Resolution surveys.
- 8.3 Please provide the survey script.
- 8.4 Please indicate at what time point customers are surveyed to canvass whether they believe their issues have been resolved? (i.e. immediately after their first contact, some specified period of time after first contact, after they have received their next bill, etc.)
- 8.5 Does FBC or the third party provider follow up on any of these surveys to determine whether the customer's issue was truly resolved in the first contact with the Company?
 - 8.5.1 If so, please provide those results.
 - 8.5.2 If not, please explain why FBC does not follow up to determine whether its First Contact Resolution figures accurately reflect the Company's performance?

9.0 Reference: **Service Quality Indicators**
Exhibit B-2, Section 13.2.2 Responsiveness to Customer Needs Service Quality Indicators,
Telephone Service Factor (Non-Emergency)

- 9.1 Please provide a table showing for each month of 2015 and 2016 (to August 31, 2016) the total volumes of non-emergency calls, and the number of calls that weren't answered within the 30 second timeframe specified in this SQL.

10.0 Reference: **Service Quality Indicators**
Exhibit B-2, Section 13.2.2 Responsiveness to Customer Needs Service Quality Indicators,
Telephone Service Factor (Non-Emergency), page 110

The 2015 result was 71 percent which was better than the benchmark of 70 percent. The June 2016 year-to-date performance is 70 percent which is equal to the benchmark.

- 10.1 Please provide an updated year-to-date TSF (Non-Emergency) current to August 31, 2016.
- 10.2 Please provide table based on Table 13-10 maintaining the June YTD and showing the August 31, 2016 YTD TSF (Non-Emergency) results as well, for each time period, the total number of non-emergency calls received and the number of non-emergency calls answered within 30 seconds.