Utility Task Force Short-Term Recommendations Action Plan Results
February 2018

The Short-Term Action Plan highlights strategies and examples of initiatives that are already in place to work towards accomplishing the five vision orientated goals.

Technology Improvements: Provide real time updates to achieve greater speed and accountability.

CPS Energy Action Item	Status	Start Date	Completion Date	Results
1. Further improve the CSI Pilot Program • notification by job • automated notifications	Complete	03/03/17	08/14/17	• **Phase 1 - In December 2016, implementation of Automatic E-mail Notifications of key milestones of New Construction Process based on feedback from customer pilot group.** • **Phase 2 - In August 2017, enhancements made to the Automatic E-mail Notifications to Opt-in from the web portal.** **Customers will receive emails at these various Project stages:** **- Work Request is in the design stage** **- Design approve ready for next stage** **- Payment is past due** **- When funds are received** **- Work is scheduled for Construction** **- Work Request is complete** **- If a Project or Work Request is put On HOLD or Delayed** **Examples of listed reasons:** **Awaiting Permits, Customer Not Ready, Design Change, Easement, Customer Payment, Site Not Ready, Streetlight Letter, Executed Contract, Plat Revision**
2. Develop workflow charts of entire process and timeline • Develop and issue workflow charts with applicable standard durations, tie to metric definitions, and establish process to identify delays	Complete	12/01/16	01/26/18	• **Customer Engineering reviewed and QA each of the Work Request (WR) types. (Tasks, durations, predecessors, and groupings)** • **Gantt chart timelines were generated for each WR type based on the review and information updates.** • **The Gantt charts provide a visual view how WR tasks may occur sequentially and/or in parallel at the same time.**

				• **Using the Gantt charts, workflows were drafted to provide an easy to understand process view of tasks included in a group of similar WR types.** • **Workflows also show the following:** **- Customer dependent tasks and how timely completion affects the completion of the Design Phase** **- Tasks shown on the Web Portal which can be referenced for additional details** **- Standard duration metrics for Design and Construction project phases**
3. Efficiently utilize current management and database system until the new system is in place • Develop employee training plan to assure knowledge of current system • implement QA/QC processes to determine accuracy • track and report to ID data entry issue	Complete	11/01/16	08/14/17	• **Phase 2 – In August 2017, delivered the following functionality within the current Work Management System:** ***People*** **Change Management & Communication** **- Customers: 5 Feedback, Prototype & Testing Sessions** **- Customers: 24 Training Classes Pre Go-Live and Post Go-Live** **- Employees: 20+ Update Sessions** **- Employees: 20 Training Classes Pre Go-Live Post/Refresher** ***Process*** **- Performance Manager Reporting Dashboard** **- ARM Streamlined Processes of New Work Request Types and Tasks** ***Technology*** **- Customer Engineering Web Portal (CPS Energy) Exterior Redesign** **- Enhancement of Customer Contact Logging for Customer Touch Points** **- Business Partner Association for Web Portal Customer Web Portal Access and Grouping** **- Contact Management for Customer Sub-Contractors to Access Web Portal**
4. Implement web portal where application, design and construction status can be accessed by outside consultants and designers • Enhance web portal functionality to provide the customer 24/7 job status, ability to submit applications digitally, and attach documents	Complete	03/03/17	08/14/17	• **Phase 2 – In August and October 2017, new features were added to the web portal:** **New types of projects to group work under and application process:** **- Residential, Sub-Division, Multi-Family, Commercial, and Temporary Service**

				New web portal look and feel with the following new features: **- Ability to review and update project information** **- Ability to request CPS Energy to assign Sub-Contractors the ability to update specific projects only on behalf of your organization** **- Ability to add contacts and comments to projects and work requests** **- Ability to update tasks to indicate completion of work** **- 24/7 status – now you can see real time updates for task completion and for work components (ex. field schedule, en-route, on-site, complete)** **- Ability to see delays in real time** **- Ability to request new accounts (Business Partners) or new addresses (Premise) when creating new projects** **- Ability to opt in and opt out of e-mail project notifications of major milestones** **- Ability to add and view Project attachments in the web portal**
5. Analyze effectiveness of utilizing CAD in lieu of design • Conduct a documented assessment to utilize CAD in lieu of GIS for design	Complete	03/27/17	05/31/17	• **Assessment conducted to analyze the effectiveness of using the AutoCAD system utilized by external entities vs. using CPS Energy's existing system, Geographical Information System (GIS).** • **Assessment report included the following:** **- Review of CPS Energy Designer workflow process** **- Identification of enterprise application dependencies** **- Determination of advantages/disadvantages of AutoCAD system usage** **- Proposed recommendation** • **Based on the assessment results, recommendation of the continuance of utilizing the GIS system was approved due to:** **- GIS is a database program and AutoCAD is largely a graphics program** **- CPS Energy is highly reliant on GIS as the system of engagement, and central data repository** **- Entire business model and process is heavily predicated upon dependencies from GIS to other**

				enterprise application programs **- GIS provides the data connectivity to utilize automated systems to monitor, deploy and restore service during outage events**

Quality Customer Service: Recognize the development and construction community as a key customer who contributes to the economic outlook of the community.

CPS Energy Action Item	Status	Start Date	Completion Date	Results
1. Develop customer surveys that provide management the opportunity to track feedback & customer service progress • Modify email signature block to include a general survey link • Ensure process in place to utilize survey results to make improvements to existing policies and procedures and employee performance	Complete	03/20/17	07/01/17	• **Developed and implemented e-mail "signature-block" customer survey for all Customer Engineering staff which allows customers to provide feedback on Designer performance at any time throughout the project duration.** • **Customer responses compiled 3 times per week and customers requesting response receive a return call.** • **Customer input allows Management to identify training opportunities and potential issues that could cause delays or customer complaints /escalations.** • **Currently working to automate "post-project" survey distribution process.**
2. Train overall process as part of understanding why others rely on you • Develop training program component around understanding customer perspective and business	Complete	10/01/16	07/01/17	• **New comprehensive training plan for Customer Engineering was developed to provide a roadmap for training improvements.** • **A new training position has been added to lead efforts to improve overall training in the department.** • **New "Design Basics" curriculum developed with training team to provide new Designers with initial week-long training prior to more formal GIS courses.** • **Developed and implemented yearly-long "People First Academy" with customer service training team to improve overall customer service in Customer Engineering.** • **Monthly "People First Academy" training classes focus on development of Emotional Intelligence and communication skills to foster the culture of exceptional customer service that was recommended by the Mayor's Utility Task Force.**

3. Develop organizational culture that instills the mission at every opportunity and builds work morale • Incorporate culture development into training plan and evaluate use of VBE or similar existing programs • Implement employee engagement programs to support employee morale improvements	Complete	10/01/16	07/01/17	• **Added additional Designer positions and Contractors to address increased workloads.** • **Created higher-grade "Industrial Design Coordinator" position in Large Commercial.** • **Removed degree requirement for progression to Grade 13 for General Designers.** • **Included various levels of staff in workshops for developments of business requirements for new version of Work Management System.**
	Complete	01/01/17	04/14/17	• **Developed employee engagement action plans from the CPS Energy Employee Engagement Survey results and focus groups.**
4. Define and establish clarity on the expectations and coordination between the Executive Account Management, Key Accounts, and Customer Engineering functions	Complete	03/10/17	04/03/17	• **4 new Executive Account Managers were selected and functions were defined.** • **Presented EAM Directors' biographies and reviewed EAM flowchart and organizational chart at the UTF meeting held on 4/03/17.**
5. Communicate changes in policy and regulatory • Ensure process in place to gain stakeholder input into change management in any process standard or regulatory changes	Complete	03/20/17	06/30/17	• **Developed and implemented the standard operating procedure (SOP), "Communicate Process for Policy and Regulatory Changes".** • **SOP's purpose is to:** **1) Promote awareness of design and process changes that affect customer stakeholders.** **2) Encourage feedback from stakeholder groups.** • **SOP defines the communication requirements for policy and regulatory changes and how information will be distributed to and feedback received from stakeholders.**

Outsourcing Opportunities: Utilize external third party resources to maintain and achieve timeline standards.

CPS Energy Action Item	Status	Start Date	Completion Date	Results
1. Optimize use of internal/external resources • Develop strategic workforce plan that addresses key resource issues and defines basis of target resource levels	Complete	09/01/16	07/01/17	• **Developed Strategic Workforce Plan.** • **Current and projected staffing and equipment review.** • **5-year needs forecast to define anticipated service gaps and development of strategies to address the gaps.** • **Developed methods and metrics to monitor and evaluate effectiveness of strategies.**

				• **SWOT analysis to ensure CPS Energy has appropriate resources to provide high-quality and timely design services.** • **Developed comprehensive Outside Contracting Strategy.** • **Identified areas that would best benefit from use of Outside Contractors.** • **Entered into contracts with a total of 12 engineering firms to provide design services over the next 3 years to improve availability of resources.** • **Implemented new process to measure Contractor performance each month in terms of timeliness, quality and value of work.**
2. Expand pilot of Turn-key contracts on multi-family projects • Develop process and conduct a formal information presentation to the multi-family developers, include the advantages and execution of turn-key in place of Developer Install	Complete	06/01/16	04/14/17	• **Multi-family Turn-key Pilot initiated in July 2015 and now available for all new multi-family projects.** • **Turn-key Pilot expanded to all subdivisions in June 2016.** • **For CY 2017: 117 turn-key subdivision projects completed in an average of 23 days per subdivision.** • **In March 2017, held meeting with Developers to encourage utilization of turn-key option for multi-family projects.** • **For CY 2017: 6 turn-ey multi-family projects completed in an average of 12 days per project.**
3. Expansion of improvements to streamline field construction • Evaluate other applications of Turn-key construction • Utilization of pre-construction and pre-design meetings in field • Evaluate 80% wet-installed requirement	Complete	03/27/17	08/15/17	• ***Turn-Key Construction*** **Multi-family construction was piloted utilizing the turn-key process with Resource Management and was completed in 12 days. Turn-key is now being offered as an option for multi-family construction.** • ***Field Meetings*** **- Pre-construction meetings were not as effective due to being too far into the work process if design changes were needed by construction which would cause delays on the customer need-by-date** **- Pre-design meetings for Customer Engineering jobs that may require more coordination between the Developer and Construction were implemented and have successfully rolled out in the District centers** • ***Wet-Installed Requirement*** **- Piloted 2 multi-family developments – 1 at 80%**

				and 1 at 50% **- 50% wet-installed development created delays in turn-key process since Developer contractors were not complete with their tasks; will not be pursued** **- 80% proved to be efficient and is being required**

Staffing to Workload Demand: Utilize staff to as needed to meet demand metrics.

CPS Energy Action Item	Status	Start Date	Completion Date	Results
1. Fill open technical positions • Expedite filling of positions with HR within policy • Pursue options to fill positions proactively	Complete	09/01/16	07/01/17	• **Streamlined hiring process and formalized process documentation, including proactive measures to identify talent and initiate the hiring process, as timing permits.** • **Working with Talent Acquisition to refine onboarding process and better synchronize with equipment procurement.** • **Established a dedicated Recruiter assigned for Customer Engineering.** • **Developed metrics and tracking to identify and implement required improvements in the recruiting process.**
2. Provide appropriate training for new hires including technical and organizational training • Include in employee training plan	Complete	10/01/16	07/01/17	• **Developed new "Design Basics" curriculum with training team to provide new Designers with initial week-long training prior to more formal GIS courses.** • **Incorporated processes associated with CSI initiatives and enhanced introductory GIS and Work Management System (WMIS) training.** • **Reassigned experienced Designer to provide one-on-one training for all new Residential and Small Commercial Designers until dedicated permanent training position can be filled.** • **Developing additional introductory/basic courses for various design types, as well as a multi-level Line Extension Training course (to be completed in FY 2019).**
3. Hire Project Managers • Evaluate staffing make up in Strategic Workforce plan	Complete	10/01/16	07/01/17	• **Developed Strategic Workforce plan.** • **Completed the hiring of 2 Project Managers for Large Commercial/Industrial Design.**

4. Re-evaluate the status of the CE organization and utilize metrics • Re-evaluate the status of the CE organization and utilize metrics	Complete	09/01/16	07/01/17	• **Developed Strategic Workforce plan.** • **Added 18 positions and 12 temporary employees in FY17-18.**
5. Clearly define project roles and responsibilities for positions involved in the end-to-end delivery process	Complete	12/01/16	01/26/18	• **This information was included in the development of the workflow charts of the entire process and timeline.** • **Refer to Technology Improvements section, #2, results column, for specifics.** • **For the customer, the Designer will be the single point of contact for end-to-end work request process.**
6. Conduct Compensation Study • Conduct job evaluations of Designer and Engineer positions to ensure salaries are competitive with the market-industry	Complete	09/01/16	03/13/17	• **Conducted comprehensive review of all of the Designer and Engineer positions across the company to ensure that salaries, grades and requirements were in line with marketplace.** • **Some salary adjustments were made for Engineers and Designers.** • **Created higher grade "Industrial Design Coordinator" position in Large Commercial.** • **Removed degree requirement for progression to Grade 13 for General Designers.**

Consistency of Policies & Procedures: Recognize the need for procedures that allow for solutions for unique challenges to be identified, developed and consistently utilized.

CPS Energy Action Item	Status	Start Date	Completion Date	Results
1. Training for staff on regulations to drive consistency	Complete	10/01/16	7/01/17	• **Customer Engineering's training plan incorporates regulation-specific training for both new and current staff.** • **All new hires attend Customer Engineering Design Basics courses on CPS Energy infrastructure, rules, regulations and technical standards.** • **Training for job-related competencies (e.g.: driving, safety guidelines, etc.) are incorporated into each employee's yearly progress goals.** • **Refresher training will be developed and made available to current staff as classes are refined in both content and presentation.**
2. Review utility regulations related to infill areas • Coordinate with TCI on bond projects	Complete	03/06/17	08/01/17	• **Coordinated with COSA TCI to obtain list of 2017-2022 bond projects.**

				• **Utility Coordination staff reviewed the list with the impacted Engineering business areas.**
3. Coordinate policies with COSA on infill development • Work with COSA on SA Tomorrow Plan and review standards and practices around Zero Lot Line development. • Implement expedited process for easement review/escalation in infill areas • Evaluating options for reduction in cost of underground infrastructure	Complete	03/06/17	08/01/17	• **CPS Energy met with SA Tomorrow Representatives who informed attendees that teams would be formed to work on developing standards for the SA Tomorrow projects.** • **CPS Energy is to review alternative ways of providing electric service in regards to infill development.** • **Underground Engineering business area is to evaluate the standards for submersible transformers and switchgear and associated vault/room specifications and is in the process of finalizing their recommendations for formal adoption.**
	Complete	03/20/17	01/12/18	• **Defined process to request exceptions to standard utility easements.** • **Expanded to all project types based on recommendations received from Real Estate Council (REC) during December 2017 meeting.** • **New Standard Operating Procedure (SOP) to define process and identify specific timeframes for each step.** • **New form to be provided by ROW Agent and completed by customer when exception to standard utility easement is requested.** • **Ability for customer to immediately appeal decision by Department Manager to appropriate Sr. Director.** • **Entire process, including appeal, should take no longer than 11 business days to complete.**
	Complete	03/06/17	08/01/17	• **Benchmarked peer utility companies to identify cost reduction opportunities for underground infrastructure.** • **Performed 2 pilot projects to evaluate reduced underground standards (McNay and Mission San Juan).** • **Project results to be reported once completed. The McNay project is near completion and the Mission San Juan project is about to start construction. Once McNay is complete, Schneider will be providing an assessment of the overall costs and lessons learned.**