

Attachment 1: Reporting form for [Part (a) Process]

Part (a): Process for existing and prospective CCAs to obtain timely utility compliance with paragraph (9) of subdivision (c) of Public Utilities Code Section 366.2, which requires the utility to “cooperate fully with any community choice aggregators that investigate, pursue, or implement community choice aggregation programs.”

PART 1 (to be completed by CCA)

Submitted by:

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Title	Administrative Associate
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Please identify the specific matter on which the utility is not considered to be cooperating fully (add lines or pages as needed):

PG&E telephone representatives provide inaccurate and misleading information to MCE customers causing confusion, frustration and opting out under false pretenses.

Please provide a detailed description of the issue (add lines or pages as needed):

Since MCE’s formation PG&E has provided misinformation to energy customers in Marin in a wide range of areas related to MCE. This began in February, 2010 when PG&E’s outbound call campaign led customers to believe that they needed to opt out to ensure reliable energy delivery.

Although the outbound calls from PG&E are no longer occurring, customers who call into PG&E’s call center continue to receive incorrect and misleading information from call center representatives (CSRs). Most, if not all of this misinformation has a negative impact on MCE’s relationship with the customer. At a minimum, the issue causes customer confusion and frustration, and in many cases it has even caused customers to opt out of MCE service under false pretenses, believing the misinformation to be true.

Within the last three months PG&E’s call center has provided misleading or inaccurate information to customer such as:

1. MCE charges are “extra” and opting out will allow them to eliminate these “extra” charges.
2. If a customer is with MCE, they will pay more to PG&E for transmission and distribution charges
3. PG&E will pay more to net-metering customers than MEA
4. There is no ‘3-year stay’ requirement for a customer who returns to PG&E

Below is a sampling of calls logged to MCE on five select days in September, 2010. This sample outlines and illustrates the ongoing misinformation PG&E is providing to MCE customers with significant negative impacts:

9/7/10 at 1:50 pm- Customer had just spoken with a PG&E CSR prior to calling MCE to opt out. CSR told her that there is no transitional rate or 3-year no-switching rule. The customer called MCE to opt out after getting this information from PG&E. *Note: PG&E requires that customers who return to PG&E service must stay with PG&E for at least 3 years before they can switch back to MCE.*

9/7/10 at 2:30 pm- Customer was told by PG&E CSR 'Joyce' at the Stockton call center and PG&E CSR Supervisor 'Brett' at the Fresno call center that he had only been with MCE for 4 billing periods so he would return to PG&E at the standard bundled rate. *Note: This is contrary to PG&E policy as the transitional rate would apply.*

9/8/10 at 10:06 am- Customer had called MCE on 7/23/10 to opt out and the opt out was processed and confirmed by MCE. The customer called the PG&E call center on 9/7/10 to confirm that the opt out had been processed correctly. On the call, which was 1.5 hours in duration, the PG&E CSR told the customer that he is still active in the MCE program, even though he is actually opted out. *Note: This puts the customer in the difficult position of not being able to trust MCE representatives and having to dedicate more time on the telephone to resolve the issue.*

9/8/10 at 11:51 am- Customer called PG&E 9/3/10 to pay her bill. The PG&E CSR told the customer to call MCE to pay her bill. *Note: customers can only pay their bill through PG&E. This is confusing and frustrating for the customer, particularly, given the long wait times on PG&E calls.*

9/8/10 at 11:42 am- Customer was told by PG&E CSR that PG&E was only handling his gas account and that MCE is handling the customer's electric account. *Note: While this would not be the case, even for an MCE customer, this customer was actually opted out of MCE as of 7/16/10.*

9/9/10 at 11:33 am- A PG&E CSR told the customer that the MCE charges are 'additional' and that he is paying more for transmission and distribution because of MCE. The customer was told that his bill was much higher because of MCE. The customer opted out because of this information.

9/9/10 at 3:03 pm- A PG&E CSR told the customer at approximately 3pm on 9/9/10 that he would not be able to return to a transitional rate if he opted out after the 'opt out period' and thus, needed to opt out now. The customer opted out because of this information.

9/10/10 at 2:49pm- Customer was told by a PG&E CSR that if she was not with MCE she would not have a generation charge and would only pay for transmission and distribution. MCE representative told her this was incorrect. She did not believe the MCE representative and said she will likely choose to opt out.

9/20/10 at 11:27 am- A PG&E CSR told the customer that the MCE charges were "extra" and that PG&E would no longer charge her the generation costs if she opted out and switched back to PG&E.

9/22/10 at 1:12 pm- The customer called PG&E to request an energy audit. PG&E told him they no longer offer that service and he needs to contact MCE.

Please describe the lack of full cooperation (add lines or pages as needed):

This issue was brought to PG&E's attention in May, 2010 when MCE began serving customers. Various instances of misinformation were the subject of ongoing, weekly operations calls between MCE, MCE's data manager (Sempra Energy Solutions/Nobel Group) and PG&E.

PG&E representatives responded by stating that their call center representatives would not always use scripts provided to them, that call center representative have so many issues to respond to that the CCA-related issues are not possible to stay up-to-date on, and that the call center, in general, could not be expected to always provide accurate information. PG&E representatives also requested that MCE keep track of call center mis-information being provided to MCE customers and give weekly reports to PG&E so that they could follow up internally after-the-fact.

While MCE was not opposed to internal follow-up and complied with PG&E's request to track calls (at our own expense), MCE requested a proactive solution that would prevent the issues from continuing to arise. MCE suggested that a small, 5-person team could be specifically trained to respond to questions from the CCA customer-base, thus addressing PG&E's concerns around training for all CSR's (customer service representatives). PG&E was not willing to establish such a team or provide any other proactive solution. This issue has not been resolved.

Please list the personnel at the utility with whom the community choice aggregator is working:

Name	Title	Phone Number	e-mail
Redacted	PG&E   Energy Solutions & Service	Redacted	
	PG&E   Energy Solutions & Service		

PART 2 (to be completed by Utility, 5 business days after notification by Energy Division)  
Submitted by:

Name	Redacted
Title	Sr. Account Manager
Phone	Redacted
e-mail	

*“The utility shall be required to respond in writing by providing a specific solution to the matter raised by the prospective or existing community choice aggregator, including a date-specific timeline for accomplishing the solution, and the names of personnel responsible for providing the solution.”*

Please describe the specific solution to the matter raised by the prospective or existing Community Choice Aggregator (add lines or pages as needed):

All customer-specific issues logged by MCE’s call center and brought to PG&E’s attention are and have been reviewed. In some cases, the customer was contacted to inquire about the situation; in other cases, the tape of the call to PG&E was reviewed and assessed for any deficiency. Where a deficiency in information provided to the customer is identified, additional training for a specific Call Center Representative (CSR) is often the appropriate remedy. In some PG&E follow-ups with customers after issues have been raised by MCE, the issue appears to have been customer confusion rather than deficient performance by a PG&E CSR. Unfortunately, unlike PG&E, MCE’s back-office administrator does not tape inbound calls; therefore, it is difficult to document and follow-up MCE’s allegations because MCE does not provide its own documentation, including the identity of specific customers for follow-up. To this end, it is in our and MCE’s shared interest to provide accurate and clear information to customers. PG&E is committed to ongoing training of its CSRs to ensure the accuracy of CCA information provided to customers.

However, PG&E does not agree that additional staffing or organizational changes are required to respond to customers’ CCA-related calls. PG&E’s Call Center is equipped to handle all calls. The system used by Customer Service Reps (CSRs) contains information specifically related to CCA issues. The current call volume would not justify dedicated CSRs as they would not be fully utilized. This conclusion is based on a general assessment that indicates receipt of 944 calls tagged as CCA related between February 17 and November 18<sup>th</sup> – a period of approximately 9 months. Based on this statistic, there were on average 105 (944/9) per month. Assuming 105 calls per month is the norm, a staff of five dedicated CSRs would only field 21 (105/5) calls per month. By comparison, it’s not unusual for a CSR to field around 100 calls per day or about 2,000 calls per month (20\*100).

Please provide the date-specific timeline that the IOU will follow in order to accomplish the solution (add lines or pages as needed):

PG&E will monitor this issue and may reconsider a dedicated CSR staff based on future call volumes.

Names of utility personnel responsible for providing [and implementing] the solution

Name	Title	Phone Number	e-mail
Redacted	Sr. Account Mngr.	Redacted	