



### **Statement of Policy**

A Utility Operations (UO) standard clearly defines an operational or procedural requirement that must be implemented consistently within affected departments of the UO organization to:

- Ensure safety.
- Comply with regulatory requirements.
- Conduct Company business uniformly and efficiently.
- Support a UO policy.

Failure to follow the requirements set forth in a UO standard could have serious consequences, such as:

- Endangering employees' lives or public safety.
- Exposing the Company to regulatory penalties.
- Reducing the Company's ability to operate efficiently.

Although the content of each UO standard varies, the process by which standards are developed shall not change. Because of the important role these documents play in setting forth the standards of Company operations, the development process is meticulous and thorough. The process ensures that if a document is issued as a UO standard, it should be considered to be a key operating document and its procedures must be followed. Together with Pacific Gas and Electric Company's utility policies and utility standard practices, standards form the backbone of UO's operations.

The UO policies, standards, and guidelines are now published on the Company Intranet. The web site contains all the most current and up-to-date versions of these documents. Online publishing, as opposed to printed manuals, allows for faster dissemination of information and ensures that all employees have the correct, latest version of a document. (Copies of some standards containing work practices related to safety and work practices for field employees are still published in operational manuals.)

The address of this web site, which also contains "Author's Tools" with instructions, forms, and templates for standard development is in the Technical Information Library:  
<http://www/techlib/>

This policy replaces Policy 4.1, "UO Standard Development," effective 10-1-00. The main purpose for updating this policy is to add senior directors with the responsibility to approve and distribute standards. This change is indicated in the third column of the table on Page 4.1-2. "Responsibility for Approving and Distributing."

**UO STANDARD DEVELOPMENT**

The following table provides definitions of UO operational documents.

**Table 1 - UO Guide to Policies, Standards, and Guidelines**

Type	Definition	Responsibility for Approving and Distributing
Policy	Describes how UO operates to achieve its goals.	Sr. VP & C (approval)
Standard	Clearly defines an operational or procedural requirement that <b>shall</b> be implemented consistently across the UO Business Unit in order to: <ul style="list-style-type: none"> <li>• Ensure safety.</li> <li>• Comply with regulatory requirements.</li> <li>• Conduct Company business uniformly and efficiently.</li> <li>• Implement a UO policy.</li> </ul>	Officer or senior director
Guideline	Provides strongly recommended actions, work processes, or general specifications. Guidelines are the result of extensive investigation into effective/efficient processes and procedures. Compliance with guidelines will allow uniformity in work procedures and will result in best overall performance by UO.  Guidelines should provide general "parameters, boundaries, and/or limits" for employees to follow for specified work activities. Guidelines <b>must</b> be followed unless business reasons dictate otherwise, in which case non-compliance must be justified by the appropriate department.	Director authorizes and issues; manager approves
Bulletin	For immediate distribution, a document that contains information on safety and other general or specific types of information. Bulletins must specify whether they are for informational purposes, mandated or recommended actions.	Manager or designee
Manual	Consolidation of detailed instructions that identify best practice work methods, operating procedures, engineering practices, and other information specific to selected functions or processes. Manuals may also contain authorized documents and be attached to standards and guidelines. The instructions contained in all manuals that are not specifically identified as a standard, guideline, numbered document, or information bulletin shall be treated as a guideline.	Director authorizes and issues; manager approves
Numbered Document	Specific minimum construction or engineering instructions, practices, and/or best practice methods required to meet regulatory requirements and Company policies (electric engineering construction drawings, gas standards and specification drawings, engineering design drawings).	Director/manager or responsible engineer
Procedure	Provides a detailed work process, the steps necessary to perform a defined work activity. May be included in a manual.	Manager or designee (manual issuance and approval, individual procedure issuance) Supervisor (manual and individual procedure approval)

# UO STANDARD DEVELOPMENT

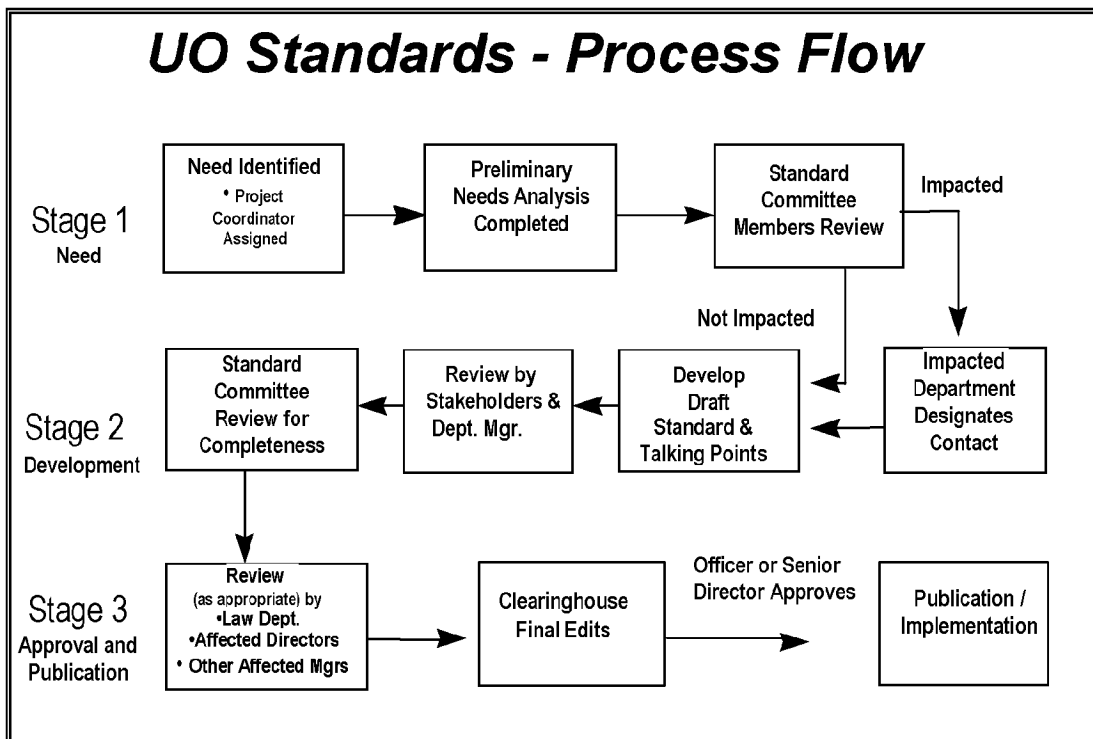
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The following are two significant aspects of the UO standard development process.

The standard developer (project coordinator) has the key role of working with appropriate departments to identify representatives to participate in standard development efforts, resolve issues, as applicable, and review the standard. The developer must consult with the stakeholders and must secure their cooperation in developing the standard. In addition, the impact of each proposed standard must be assessed and weighed against the risk of not developing it.

UO Standard Committee members have a key role in ensuring consistency and uniformity in standard development efforts. They recommend standard development policy and processes, provide general guidance and support to standard developers, assist with standard stakeholder identification, and provide general input in standard development and review efforts.

The figure below indicates the basic steps in the development process.



**FIGURE 1**  
**UO STANDARD DEVELOPMENT PROCESS FLOW**

## UO STANDARD DEVELOPMENT

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### Overall Accountability

The overall accountability of each position and organization that is involved in developing and implementing a UO standard is broken down into roles and responsibilities as follows:

**Table 2 - Accountability**

<b>Title/Organization</b>	<b>Role</b>	<b>Responsibilities</b>
<b>UO Senior Vice President &amp; Chief</b>	To authorize UO policies.	<ul style="list-style-type: none"> <li>• Authorizes UO policies.</li> <li>• Ensures that they are issued, updated as required, and monitored for compliance.</li> </ul>
<b>UO Officer or Senior Director</b>	To authorize UO standards.	<ul style="list-style-type: none"> <li>• Sponsors standards and supports the development process.</li> <li>• Approves new and revised standards.</li> <li>• Appoints a member to the UO Standard Committee.</li> <li>• Cancels obsolete standards.</li> </ul>
<b>UO Department Director</b>	To sponsor UO standards.	<ul style="list-style-type: none"> <li>• Sponsors and supports standard development efforts.</li> <li>• Supports the project coordinator to ensure appropriate resources, communications, support, and awareness of standard, as needed.</li> <li>• Reviews the standard and recommends officer or senior director approval.</li> <li>• Requests updates of standards.</li> </ul>
<b>UO Department Manager</b>	To assign a project coordinator and support standard development.	<ul style="list-style-type: none"> <li>• Supports the project coordinator to ensure appropriate subject matter experts and resources are provided.</li> <li>• Reviews and approves the preliminary needs analysis.</li> <li>• Reviews and recommends approval of the standard.</li> <li>• Supports the project coordinator to ensure communications, support, and awareness of standard across department lines, as needed.</li> </ul>

## UO STANDARD DEVELOPMENT

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Title/Organization	Role	Responsibilities
<b>Project Coordinator (Standard Developer)</b>	To write and coordinate development of the UO standard and to communicate with all participating individuals throughout the entire development process. The project coordinator should expect to devote a significant amount of time to developing a technically accurate and operationally feasible UO standard that complements existing practices and procedures.	<ul style="list-style-type: none"> <li>• Develops and completes the preliminary needs analysis.</li> <li>• Develops and writes the UO standard, ensuring it is thorough and complete.</li> <li>• Initiates communication and builds awareness of the UO standard across functional and department lines, as needed.</li> <li>• Identifies appropriate subject matter experts and resource requirements.</li> <li>• Coordinates and secures all necessary approvals.</li> <li>• Completes the talking points and review sheets.</li> </ul>
<b>UO Standard Committee Member</b>	<p>To ensure that a standard is the proper communication tool, that adequate resources are allocated to the development process, and that all impacted groups are given the opportunity to participate.</p> <p>To ensure that the developers comply with the requirements of the process.</p> <p>To represent the functional department as delegated by the responsible UO officer or senior director.</p>	<ul style="list-style-type: none"> <li>• Reviews, provides input, and recommends approval of the preliminary needs analysis and standards.</li> <li>• Sponsors the UO standard at Standard Committee meetings.</li> <li>• Supports the project coordinator in standard development efforts, as needed.</li> <li>• Identifies appropriate subject matter experts and provides other input.</li> <li>• Serves as an arbiter on adopting any standard.</li> </ul>
<b>Clearinghouse / Technical Document Management</b>	To serve as a central source of information for developing UO standards and as a repository for completed standards.	<ul style="list-style-type: none"> <li>• Coordinates committee meetings.</li> <li>• Provides training in and materials for the development process.</li> <li>• Provides assistance during standard development, including technical writing and editing, and quality control.</li> <li>• Ensures the UO standards meet publication requirements.</li> <li>• Produces, distributes, and archives UO standards.</li> <li>• Follows up and tracks review dates and communicates with issuing departments.</li> </ul>

## UO STANDARD DEVELOPMENT

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Title/Organization	Role	Responsibilities
<b>Stakeholder and Subject Matter Expert</b>	To implement all of the provisions of the UO standard. To determine if the proposed standard is operationally feasible. (Experts may come from any area of the Company, not just UO.) Third party reviewers such as safety or engineering experts can also review the standard.	Reviews the UO standard for functional and operational feasibility, and technical accuracy.

### Development Process Details and Training

As a central source of information, the Technical Document Management (TDM) Clearinghouse maintains the development process details and develops the training materials for those involved in developing standards. These details include the minimum requirements and any associated templates for the standard, preliminary needs analysis, and talking points summary. These and other administrative details are handled with the concurrence of the UO Standard Committee. Those involved in developing UO standards are to contact the TDM Clearinghouse for information and training.

### Authorization for Issue/Update

Original signed by:

***Thomas B. King***

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Thomas B. King  
Senior Vice President and Chief, UO

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