

**Pro-Rated 2008 STIP**

A transitional payment equal to each employee's calculated 2008 STIP award, prorated to the date of ratification, will be paid to employees at the time of the regular STIP payout in 2009. The payment will be based on the employee's eligible earnings in 2008 prior to ratification including any retroactive pay adjustment and the organization's final STIP score; it will be paid at a flat percentage to all employees and not based on individual performance ratings.

**Work Jurisdiction**

The parties agree that there is shared work jurisdiction between the Principal Project Manager and this unit. The Company and Union agree to continue the shared work jurisdiction as currently practiced; there are currently 4 Principal Project Manager positions: 2 regular Principal Project Managers and 2 rotational Principal Project Managers (whose base classification is Senior Project Manager). The Company will notify the Union of projects assigned to Principal Project Managers in advance and will meet and confer with the Union before increasing the number of Principal positions, including rotational positions, to more than 4.

The Company also agrees to maintain a minimum ratio of Senior Project Managers in this unit such that a minimum of 50% of all Project Manager positions are Senior Project Manager positions or higher. Additional Senior Project Manager positions will be added as regular Project Manager positions are added to reflect this ratio as closely as possible. Normal rounding will apply in determining the number of Senior Project Manager positions. In no case will the ratio result in the selection of a Senior Project Manager who is unqualified for the position. The Company may expand or reduce the number of Senior Project Manager positions provided it maintains the minimum ratio. If the Company chooses to downgrade a Senior Project Manager position to a journey Project Manager position solely to maintain the ratio, the incumbent will be placed as a PIO Senior Project Manager, however, such PIO assignment will not be made if the reduction is the result of the application of Title 22 or due to a demotion resulting from a documented performance deficiency.

**Benefits**

Vacation granted for 2008 and subsequent years will be in accordance with the provisions of Section 9.2. Employees whose vacation accrual rate is greater than that set forth in Section 9.2 as the result of a Special Employment Offer shall have their vacation accrual rate "grandfathered" – i.e., maintained at its present level until the amount of vacation due the employee per Section 9.2 is greater than present, at which time they shall receive vacation per Section 9.2.

**ESC Agreement**

These employees will be Incorporated into the existing ESC Collective Bargaining Agreement ("Agreement") and Benefit Agreement, with the following noted exceptions:

The Company and Union agree that these classifications shall be Exempt pursuant to wage and hour regulations. To recognize the different applications of the contract for Exempt, monthly paid, the attached modification to the agreement, including but not limited to Titles 7, 8, 9, 11, 16, 17, 21, and 22 are included as Attachment A.

**Seniority Application**

Seniority shall be determined using the employee's date of hire at PG&E.

**Performance Standards**

The Company will continue with the existing performance appraisal standards and those will be updated by a joint Company-Union Committee to support the shared objective of achieving top quartile performance.

**Management Relocation Offer**

The Company may continue to offer the management relocation program and additional vacation to new hires into the department.

**Professional Membership and Training**

Employees will be reimbursed, through tuition assistance or other program, for PMP/CAPM examination and renewal costs, fees, and appropriate preparation courses, including Continuing Education Units. Selection and enrollment in programs will be in conjunction with annual developmental plans. Time spent attending training, if approved, may be considered as time worked. Decisions on approvals will be made at the Director level.

Reimbursement of professional registration (e.g., PMP, CAPM, PE) license fees shall follow current practices: Company shall reimburse employees for the first exam, but not for second and later exams. Company shall reimburse registration renewal fees. Review courses shall be attended on employee's time; tuition is covered under Tuition Refund Program.

Based on the employee's approved developmental plan, Company shall reimburse for reasonable costs incurred attending conferences or training specific to the Project Management discipline. The time spent traveling to or from training may be considered as time worked under the provisions of Title 7 Hours as provided in this letter agreement. Programs reimbursed by the Tuition Refund program are not eligible for Additional Time Worked compensation.

Company shall meet with the union annually to discuss the training opportunities, developmental plans, and the distribution of the program among the employees. In order to provide transparency, the company will provide the union with information including which employees have requested and attended trainings, the type and content of trainings attended, etc.

## **Attachment A: ESC Agreement Changes for Project Managers and Project Controls Analysts**

### **Title 7. Hours**

Since the work hours of Exempt employees covered by this Exhibit may vary on any given day, it is expected that they may be required to work for more than eight hours on a workday or to work on a non-workday as the occasion demands. Additional time worked may be eligible for compensation as outlined by the Additional Time Worked policy in Title 17 of this Exhibit.

The provisions for overtime pay in Section 7.3 are not applicable to Project Services employees included in this unit.

The provisions of Section 7.4 (f) shall apply to employees covered by this Exhibit.

Business travel for Exempt employees is an integral part of their duties and may be considered as time worked and paid under the Additional Time Worked policy. However, employees are not eligible for pay for additional time worked for commuting to or from their regular headquarters. To receive payment for travel time incurred outside of normal work hours, Exempt employees must receive approval in advance from their supervisor or higher as described in Title 17 of this Exhibit.

### **Title 8. Holidays**

The provisions for overtime pay in Section 8.5 are not applicable for Exempt employees.

### **Title 9. Vacations**

#### 9.16 Hourly Increments

Exempt employees shall not be charged vacation leave for increments used of less than four (4) hours.

### **Title 11. Sick Leave**

#### 11.6 Hourly Increments

Exempt employees shall be charged sick leave in four (4) hour increments, with no charge made for increments of less than four (4) hours. Once the four (4) hour threshold is met, additional sick leave will be charged in hourly increments. No deduction shall be made for an increment of less than four (4) hours from the wages of an employee who has exhausted his/her sick leave.

- Example #1: Employee is off 3 hours for a medical appointment – the employee's sick leave account is not charged.
- Example #2: Employee is off 5 hours for a medical procedure – the employee's sick leave account is charged for the 5 hours.

### **Title 15. Wages and Classifications**

#### 15.3 Temporary Assignments to Higher Classification

The provisions of Section 15.3 shall not be applicable to these Exempt employees.

1. Journey Project Managers shall be upgraded to Senior Project Manager while assigned three or more projects defined as Senior Project Manager level on the attached table of Project Types by Career Stage.
2. Senior Project Managers shall be upgraded to Senior Consulting Project Manager while assigned one or more projects defined as Senior Consulting Project Manager level on the attached table of Project Types by Career Stage. The PMP certificate is not required for upgrade to Senior Consulting Project Manager.

3. Journey Project Controls Analysts shall be upgraded to Senior Project Controls Analyst while assigned three or more projects defined as Senior Project Manager level on the attached table of Project Types by Career Stage.
4. For all these upgrades, the term of assignment is defined as initial assignment until the end of construction. Projects that have finished construction shall not be counted.

**Title 16. Meals**

The provisions of Section 16.2, 16.4 and 16.6 shall not be applicable to these Exempt employees.

(a) Meals are reimbursable if required for:

- 1) a business need to host customers or guests
- 2) out of town or overnight travel
- 3) business related circumstances that prevent normal meal practice
- 4) conferences or training sessions
- 5) business meetings
- 6) group or individual recognition

Approval for reimbursement is required by an employee's supervisor. Meals involving only PG&E employees conducting internal PG&E business or staff related meetings (i.e., items 5 and 6 above) are discouraged and are only reimbursable if approved by the employee's Director or VP.

Employees are expected to use good judgment in selecting moderately priced meals.

(b) Groceries or the cost of meals prepared at home are not usually eligible for reimbursement. Exceptions may include meals prepared when on extended assignment away from home and home prepared meals when hosting clients on Company business. When such meals are reimbursable, reimbursement is limited to the actual cost of food and beverages purchased and consumed, or the catering costs if applicable.

**Title 17. Overtime**

The following overtime provisions shall be applicable to Exempt employees covered by Exhibit R and will replace the provisions of this Title in the Agreement. Further, provisions for overtime payment contained elsewhere in the Agreement, including its exhibits or any other agreements between the parties, shall not be applicable to these Exempt employees unless otherwise specifically agreed upon.

Additional Time Worked for Monthly Paid ("Exempt") Employees

- a) Exempt employees will be eligible for compensation at the straight-time rate of pay for work beyond normal work schedules, subject to the conditions contained below:
  1. Employee receives prior authorization from a supervisor, manager or director within the department to work beyond normal daily work schedule or on a non-workday to meet critical work requirements, including time worked by telecommuting or remote access or on Regular Days Off associated with Alternative Work Schedules.
  2. Employee works at least one hour beyond the normal daily work schedule, or works on a non-workday. On normal workdays, only the time beyond the initial one hour beyond the normal work schedule will be compensated. On non-workdays, all time worked will be compensated.
  3. Employee is not eligible for any other type of special incentive to offset additional time worked.

## **Title 21. Job Bidding, Promotion and Transfer**

### **Advancement to Senior Analyst**

Project Controls Analyst who meet the requirements of the Senior Project Controls Analyst position and are performing satisfactorily in their current classification shall advance to Senior Project Controls Analyst upon reaching 5 years experience; such experience may include 7 years PG&E experience or 8 years related industry experience as well as time in Project Services.

### **Project Controls Analyst Vacancies**

When vacancies occur for Project Controls Analyst or Senior Project Controls Analyst positions, a selection board comprised of two management and two union appointed employees will interview all interested and qualified employees, using jointly-developed job qualifications and interview questions. The selection board shall evaluate the candidates against the selection criteria to determine who is most qualified.

Candidates for the vacancies will be considered using an alternating process. Every other vacancy shall be considered "ESC Preferred" and will be subject to the following process.

1. The Company must post the position internally and may also advertise the position externally.
2. The first candidates to be interviewed for Project Controls Analyst opening shall be only other ESC-represented Analysts and Senior Analysts; for Senior Project Controls Analyst openings, only other ESC-represented Senior Analysts. Only if no such candidates apply, or the panel rejects all candidates in this round, will second round interviews be held.
3. The second round of candidates to be interviewed shall be other ESC-represented employees meeting minimum the qualifications for the position. Only if no such candidates apply, or the panel rejects all candidates in this round, will third round interviews be held.
4. The third round of interviews will be all other candidates.
5. The Company may create the schedule of interviews for all three rounds of candidates at the same time.

In either case, applicants must meet minimum qualifications in order to be considered by the selection board. In the event the board is deadlocked, a fifth member alternately selected by the Union and the Company will be added to the panel to resolve disputes.

### **Advancement Associate-Journey Project Manager**

Associate Project Managers who meet the requirements of the Journey Project Manager position and are performing satisfactorily in their current classification shall advance to Journey Project Manager upon reaching 3 years experience; such experience may include 3 years PG&E experience or 4 years related industry experience as well as time in Project Services.

### **Associate and Journey Project Manager Vacancies**

When vacancies occur at the level of Associate or Journey Project Manager, a selection board comprised of two management and two union appointed employees will interview all interested and qualified employees, using jointly-developed job qualifications and interview questions. The selection board shall evaluate the candidates against the selection criteria to determine who is most qualified.

Candidates for the vacancies will be considered using an alternating process. Every other vacancy shall be considered "ESC Preferred" and will be subject to the following process.

1. The Company must post the position internally and may also advertise the position externally.
2. The first candidates to be interviewed shall be only other ESC-represented Project Managers. Only if no such candidates apply, or the panel rejects all candidates in this round, will second round interviews be held.
3. The second round of candidates to be interviewed shall be other ESC-represented employees meeting minimum the qualifications for the position. Only if no such candidates apply, or the panel rejects all candidates in this round, will third round interviews be held.
4. The third round of interviews will be all other candidates.
5. The Company may create the schedule of interviews for all three rounds of candidates at the same time.

In either case, applicants must meet minimum qualifications in order to be considered by the selection board. In the event the board is deadlocked, a fifth member alternately selected by the Union and the Company will be added to the panel to resolve disputes.

**Senior and Senior Consulting Project Manager Vacancies**

When vacancies occur at the level of Senior Project Manager, the selection panel will first consider qualified journey Project Managers covered by this agreement. If no journey Project Managers apply, or the panel rejects all journey Project Manager applicants, the panel may consider other candidates.

When vacancies occur at the level of Senior Consulting Project Manager, the selection panel will first consider qualified Senior Project Managers covered by this agreement. If no Senior Project Managers apply, or the panel rejects all Senior Project Manager applicants, the panel may consider other candidates.

**Posting of Positions in more than one Headquarters**

In filling positions in field locations, the Company may identify multiple locations as a possible headquarters. All potential locations must be in the same geographical bid region; there are currently 4 geographical bid regions per Title 21.3 of the contract: Bay Region, Mission Trail Region, Northern Region and San Joaquin Valley Region. If these are changed, any changes will also apply to this agreement. In those cases, the successful candidate will choose the office from those listed to use as their work headquarters. If an employee vacates a position, the position may be re-posted in more than one office, as long as all potential headquarters are within the same geographical bid region. In the event work shifts locations, any movement of employees will follow the provisions of Title 22.

**Title 22. Demotion and Layoff**

In the event that Demotions and Layoffs are needed, the company will follow the provisions of Title 22 of the Agreement. Within the established unit, employees who meet the full requirements of the position may displace less senior employees in their reverse line of progression with service based on overall company seniority

**Line of Progression and Reverse Line of Progression**

Project Manager classifications will be separate line of progression, reverse line of progression and bidding unit. Project Controls Analyst classifications will be separate line of progression, reverse line of progression and bidding unit.

**Title 27. Management of Company**

Engineer Trainees may perform bargaining unit work as part of the Engineer Trainee Program for a period not to exceed one year.

**Attachment B: Job Descriptions for Project Managers and Project Controls Analysts**

<b>Associate Project Manager</b>	
<b>Summary</b>	This project management position is the first in a progression and is responsible for managing the scope, schedule, and cost of low to medium complexity distribution projects. In this role, there are no direct reports; rather people and other resources are managed indirectly as part of a project team with limited supervision and guidance. External contacts are typically limited to overseeing contractors and providing information to third parties. Project duration is typically less than 1 year and projects do not require CPUC or Agency permits. The level of responsibility of this position increases with experience.
<b>Job Duties</b>	<ul style="list-style-type: none"> <li>• Develops and defines project scope and objectives.</li> <li>• Establishes and leads project team with agreed-upon roles and responsibilities.</li> <li>• Obtain commitment on detailed work plans including schedule, cost, resource, contingency and communication plans.</li> <li>• Obtains management approval as needed and is responsible for project tracking and analysis of project costs, scope and schedule.</li> <li>• Ensures project documentation is maintained.</li> <li>• Develops, monitors and updates the project cash flow.</li> <li>• Manages dates, operations, tasks and scheduling in current software system (e.g. WM).</li> <li>• Ensures all specialized materials are ordered in a timely manner.</li> <li>• Manages the integration of vendor tasks and tracks and reviews vendor deliverables.</li> <li>• Communicates project status on a regular basis to all stakeholders.</li> <li>• Assesses project risk and formulates mitigative contingency plans.</li> <li>• Implements quality standards, reviews project deliverables and communicates variances accordingly.</li> <li>• Identify and communicate lessons learned and incorporate prior lessons learned as best practices into projects.</li> <li>• Adjusts project scope, with project sponsor approval, and schedule as appropriate to accommodate change</li> <li>• Identifies project performance issues, analyzes and addresses them in a timely manner.</li> <li>• Effectively completes multiple projects concurrently.</li> <li>• Represents and promotes the project and its contribution to company goals.</li> </ul>
<b>Knowledge / Abilities</b>	<ul style="list-style-type: none"> <li>• Ability to work with both internal and external customers/clients.</li> <li>• Ability to handle many projects simultaneously and prioritize work effectively.</li> <li>• Problem resolution and decision making ability – shows initiative and good judgment in resolving issues.</li> <li>• Ability to lead group meetings effectively, influence others and build agreement.</li> <li>• Strong communications and analytical skills.</li> <li>• Good facilitation and presentation skills.</li> <li>• Business computer skills, such as Microsoft Office Suite Programs (Emphasis on Excel, Word, and MS Project)</li> <li>• Ability to forecast and manage costs and schedules based on project assignments.</li> </ul>
<b>Qualifications</b>	A bachelor's degree from an accredited college or its equivalent in education and experience. Plus 1 year experience in project management, project controls, engineering and/or construction if PG&E/2 years if outside hire.

<b>Journey Project Manager</b>	
<b>Summary</b>	This is a career or journey level project management position that requires mastery of the Associate level Project Manager skills and duties and is responsible for all aspects of the development and implementation of assigned projects. This position has overall project management responsibility and provides a single point of contact for those projects. Uses independent judgment in applying Project Management fundamentals, working with minimal supervision. Interacts with senior internal and external contacts. External contacts include overseeing contractors and providing information to or exchanging information with third parties (e.g. Government, regulatory, or community groups).
<b>Job Duties</b>	<p>Is able to perform the job duties of an Associate Project Manager. Additional job duties include:</p> <ul style="list-style-type: none"> <li>• Provides technical and analytical guidance to project team.</li> <li>• Recommends and takes action to direct the analysis and resolution of problems.</li> <li>• Oversees and administrates low risk EPC contracts per project type table in accordance with ESC Work Oversight Committee.</li> <li>• Represents PG&amp;E to government agencies as required for assigned projects.</li> </ul>
<b>Knowledge / Abilities</b>	<ul style="list-style-type: none"> <li>• Knowledge and experience with substation, gas and electric distribution and transmission projects.</li> <li>• Uses independent judgment in selecting and applying Project Management methods and techniques to determine cost-effective and practical solutions.</li> <li>• Fluent in the use of PM tools and current company tools, such as SAP Financials and Work Management modules.</li> </ul>
<b>Qualifications</b>	A bachelor's degree from an accredited college or its equivalent in education and experience. Plus 3 years experience in project management, project controls, engineering, and/or construction if PG&E/4 years if outside hire.

<b>Senior Project Manager</b>	
<b>Summary</b>	This job is the fully qualified, career-oriented, Senior Project Manager position that requires mastery of the journey level Project Manager job duties. Under general direction, exercises judgment and discretion and is responsible for all aspects of the development and implementation of assigned projects and provides a single point of contact for those projects. Project duration is generally multi-year, requires significant risk management, and may include formal partnering agreements with outside firms. Assignments will have high visibility, require extensive project management skills and often require specific discipline and areas of expertise.
<b>Job Duties</b>	<p>Is able to perform the job duties of a journey level Project Manager. Additional job duties include:</p> <ul style="list-style-type: none"> <li>• Determines that project objectives are achievable.</li> <li>• Provides guidance to engineering on producing complex risk and alternative analyses, studies and conceptual designs for presentation to project sponsor.</li> <li>• Oversees and administrates EPC contracts in accordance with ESC Work Oversight Committee.</li> <li>• Negotiates third party contracts, in support of other departments when appropriate.</li> <li>• Develops and champions company-wide best practices.</li> <li>• Makes presentations to PG&amp;E Officers as appropriate.</li> <li>• Arbitrates and resolves conflicts within the project.</li> <li>• Mentors and provides guidance to less experienced project managers.</li> </ul>
<b>Knowledge / Abilities</b>	<ul style="list-style-type: none"> <li>• Knowledge of land acquisition, CPUC and environmental permitting and EPC contracting procedures.</li> <li>• Superior ability to interface with and across supporting organizations and conduct formal presentations to officers.</li> </ul>
<b>Qualifications</b>	A bachelor's degree from an accredited college or its equivalent in education and experience. Plus 8 years experience in project management, project controls, engineering and/or construction if PG&E/9 years if outside hire.

<b>Senior Consulting Project Manager</b>	
<b>Summary</b>	This position provides expert-level project management and leadership of diverse teams for Project Management's largest projects. These projects impact Business Unit financial performance, success, and strategic objectives. Projects typically are multi-year, exceed \$10 million, require significant risk management, are highly complex, and may include formal Partnering agreements with other firms. Under general direction, responsible for all aspects of the development and implementation of assigned projects and provides a single point of contact for those projects.
<b>Job Functions</b>	<p>Is able to perform the job duties of a Senior Project Manager. Additional job duties include:</p> <p><b>PROJECT MANAGEMENT</b></p> <ul style="list-style-type: none"> <li>• Establishes unit cost and monitors progress/accomplishment</li> <li>• Identifies and implements non-traditional processes to implement the project that reduce cost and/or schedule.</li> </ul> <p><b>COMMUNICATION/TEAMWORK</b></p> <ul style="list-style-type: none"> <li>• Communicates regularly with PG&amp;E Officers, managers, critical project partners and high-level public sector contacts.</li> </ul> <p><b>LEADERSHIP</b></p> <ul style="list-style-type: none"> <li>• Mentors and provides guidance to less tenured project managers.</li> </ul>
<b>Knowledge / Abilities</b>	<ul style="list-style-type: none"> <li>• Proven advanced project management skills.</li> <li>• Able to develop complex schedules with multiple dependencies.</li> <li>• Understanding of integrated cost and schedule management.</li> <li>• Strategic and business acumen skills.</li> <li>• Superior ability to interface with and across supporting organizations and conduct formal presentations to officers.</li> <li>• Ability to mentor other PMs.</li> </ul>
<b>Qualifications</b>	A bachelor's degree from an accredited college or its equivalent in education and experience. Plus 13 years experience in project management, project controls, engineering and/or construction if PG&E/14 years if outside hire. Project Management Professional (PMP) certificate required.

<b>Project Controls Analyst</b>	
<b>Summary</b>	A journey level Analyst position that provides support to Associate to Journey Project Manager level distribution and/or transmission projects (per Project Types table) with minimal guidance of the Project Manager/PCA Supervisor.
<b>Job Functions</b>	<p><b>Schedule Development and Analysis:</b></p> <ul style="list-style-type: none"> <li>• In coordination with Project Manager develop project schedule and cash flow/forecast plans with functional department input.</li> <li>• Attend Project and Job kickoff and walk down meetings.</li> <li>• Create, maintain and update schedules.</li> <li>• Document, monitor and communicate project milestones and risks with appropriate stakeholders.</li> <li>• Participate in project status meetings, collect progress data and revise project plan as needed.</li> <li>• Monitor financial progress and maintain Project Manager's order group. Develop, maintain and control project schedule plans using appropriate software (for ex: SAP Project System, SAP Work Management System, and MS Project).</li> </ul> <p><b>Cost Plan Development and Analysis:</b></p> <ul style="list-style-type: none"> <li>• Use the cost and schedule plan to determine if project objectives are achievable.</li> <li>• Create, maintain, and update monthly forecast budgets.</li> <li>• Prepare various cost reports and maintain forecast accuracy. Prepare project performance analysis, cost, and schedule status reports. Identify cost and schedule variances from objectives and recommend corrective action.</li> <li>• Assess and report on project performance using established industry standards.</li> <li>• Ensure that responses to project budget, and GRC or FERC cost requests reflect accurate and current project cost information and stakeholders are in concurrence.</li> <li>• Provide regular communication on project cost, schedule and risk status to project team members, stakeholders and public.</li> <li>• Interface with design and planning resources and software systems.</li> <li>• Review and assist in the preparation of Advance Authorizations, Job Estimates and Re-Authorizations and assist PM in routing for approval.</li> <li>• Prepare journal entries and coordinate or process goods receipts in current software system.</li> <li>• Ensure that responses to budget and cost requests reflect correct project cost information and stakeholders are in concurrence.</li> <li>• Input data into various programs and prepare various cost and forecasting reports.</li> </ul> <p><b>Project Documentation &amp; Reporting:</b></p> <ul style="list-style-type: none"> <li>• Verify that project cost and schedule milestones were/were not attained and provide input to identify future process or business improvements and work with responsible parties to implement.</li> <li>• Manage orders from inception through completion and all required documentation is entered in current software system (Ex: EDMS).</li> <li>• Resolve all open items, ensure compliance requirements are met and settlement rules are entered, and close out order.</li> <li>• Maintain scope change, contingency release, change order, and journal entry logs.</li> <li>• Maintain written and electronic project documentation and records for required aspects of the project: Maintain project files in accordance with established guidelines and requirements (Ex: utilizing the electronic document management system or EDMS).</li> <li>• Document change order requests, project status, key issues, risks and</li> </ul>

	<p>resolution, priority changes and approvals.</p> <ul style="list-style-type: none"> <li>• Provide Project Manager with monthly report of project costs and/or schedule information including variance analysis according to an agreed upon level of detail and prioritization.</li> <li>• Provide Project Team members with current status report containing schedule and cost information. Comply with Utility Operations Policies, Standards and Guidelines.</li> <li>• Assist PM with Post Job Critique.</li> </ul>
<b>Knowledge / Abilities</b>	<p><b>DESIRED:</b></p> <ul style="list-style-type: none"> <li>• Experience with appropriate software tools, currently SAP Work Management, Controlling Orders, Planning Orders, and BW</li> <li>• Project Management, Project Controls, or Construction Management experience</li> <li>• Risk Management and Earned Value Analysis experience</li> <li>• Accounting/budgeting knowledge</li> <li>• Mathematical skills</li> <li>• Forecasting skills</li> </ul>
<b>Qualifications</b>	<p>A bachelor's degree from an accredited college or its equivalent in education and experience. Must include minimum 1 year experience in transmission, distribution, business planning, accounting, and/or finance if hired externally. CAPM or PMP Certificate desired.</p>

<b>Senior Project Controls Analyst</b>	
<b>Summary</b>	A senior level analyst position able to work and to provide analytical support on any distribution and transmission projects. The Senior Analyst will have excellent computer skills and knowledge of the various tools and software of Project Services. If assigned, may perform different functions in the Central Data Management or Financial units.
<b>Job Functions</b>	<p>May perform all the functions of the Project Controls Analyst and in addition:</p> <p><b>Schedule Development and Analysis:</b></p> <ul style="list-style-type: none"> <li>• Attend, actively participate and at times assist in leading the project and job kick-off and walk down meetings</li> <li>• Lead the project team to develop project plans</li> <li>• Educate and ensure team members understand and utilize appropriate project accounting. Conduct project status meeting, collect progress data and revise project plan, as needed.</li> <li>• Use the schedule plan as the basis for developing, maintaining and controlling the cost plan. Manage project forecast by collecting, coordinating, monitoring and tracking project forecasts from project players, vendors and contractors to ensure that expenditures are within the agreed-upon costs.</li> <li>• Provide cost variance explanations to program managers or planners when necessary</li> <li>• Work in collaboration with the Project Manager and project team to develop, maintain and control project schedules.</li> <li>• Analyze schedule start, completion, and duration variances utilizing the baseline schedule as the approved plan. Identify schedule variance and provide Project Manager with recommendations for corrective actions.</li> </ul> <p><b>Cost Plan Development and Analysis:</b></p> <ul style="list-style-type: none"> <li>• Analyze and trend cost variances by comparing the current cost plan against the actual cost to date.</li> <li>• Forecast costs to completion up to approved or authorized cost budget amount.</li> <li>• Identify cost variances and investigate suspicious charges and provide recommendations for corrective action. Analyze and validate actual charges to project orders and notify responsible individual(s) of cost issues; take corrective actions as necessary.</li> <li>• Manage controlling orders which may include order creation, order status changes, entry of asset settlement rules, etc. and ensure team members understand and utilize appropriate project accounting.</li> <li>• Ensure that responses to budget and cost requests reflect correct project cost information and stakeholders are in concurrence.</li> <li>• Create Work Management System Notifications as needed to identify future work and resources.</li> </ul> <p><b>Project Documentation &amp; Reporting:</b></p> <ul style="list-style-type: none"> <li>• May provide special reports for supervisor or manager upon request.</li> </ul> <p style="text-align: center;"><b>Central Data Management Functions</b></p> <p><b>Data Management</b></p> <ul style="list-style-type: none"> <li>• Maintain Project Management and Construction Management databases for tracking Operational Metrics.</li> <li>• Work with the Project Management Leadership Team to automate data gathering and reporting.</li> <li>• Act as the point of contact for Project Management group for any PMD or CMP updates or modifications to order groups.</li> <li>• Work with the appropriate departments to resolve issues and implement</li> </ul>

solutions.

#### **Quality and Analysis**

- Prepare various monthly and weekly project management reports and report performance reports to management group including scorecards.
- Ensure quality of reports for the department, to report out to stakeholders.
- Validate weekly and monthly data sets.
- May provide support to project manager(s) as necessary

#### **System Support**

- Provide technical support for the PMD system, for the Department.
- Provide computer installation advice to the Department.
- Act as the Project Management User Rep, for all new PMD/CMP developments and enhancements, that impact Project Management work.

#### **Special Projects**

Fulfill ad-hoc requests for cost-related data and analysis

### **Central Financial Analysis Functions**

#### **Project Budget & Cycle Forecast Planning:**

- Work with Business Planning in preparing the Annual Budget Plan, for all three Project Management Departments – Electric and Gas Transmission, and Distribution.
- Document, monitor, and communicate the Budget plan with appropriate stakeholders.
- Attend all department-related planning meetings, and revise project plan, as needed.
- Oversee the Budget planning, in BW, and ensure the PRJ planning version data is properly rolled up to RES.
- Work with Management Reporting to ensure the PCC rates are accurate and are copied correctly into all planning versions in SAP/BW.
- Act as the point of contact, for Project Management, for BW and for Budget forecast planning issues. Work with the appropriate departments to resolve issues and implement solutions.

#### **Project Budget & Cycle Forecast Monitoring/Reporting:**

- Prepare various monthly and weekly project performance reports - budget and cycle forecast reports; and finance status reports, utilizing the SAP/BW system and PMD.
- Coordinate and work with all stakeholders, on creating new reports, that best measure and support good business decisions, to meet the Year End Annual Budget target.
- Coordinate and summarize project cycle forecast variance explanations, for the department, to report out to stakeholders.
- Ensure that all responses to budget, quarterly cycle requests reflect accurate and current project cost information and stakeholders are in concurrence.
- Post and update all the project performance; budget and cycle forecast; and status reports on the Project Management website.

#### **Financial and Performance Management:**

- Monitor, analyze and report out on the Department's Forecasting Performance, with weekly performance reports, utilizing the SAP/BW system and PMD.
- Analyze financial results on a monthly basis, providing explanations of significant cost drivers to PM Leadership – reports such as the Green-Red Scorecard and Lessons Learned Reports.
- Create new and maintain existing BW reports, for use with upper

	<p>Management, and for Project Manager/Analysts, to review forecast performance.</p> <p><b>Capital Accounting Support:</b></p> <ul style="list-style-type: none"> <li>• Single point of contact for all Capital Accounting data requests (Various)</li> <li>• Coordinate the department responses, for the following Monthly Capital Accounting data requests:             <ol style="list-style-type: none"> <li>1. Major Capital Projects Status Report</li> <li>2. Construction Work in Progress Report for projects not operative</li> <li>3. Plant in Service Report for projects that are operative</li> </ol> </li> <li>• Prepare accurate and timing responses to all internal and external accounting/financial data requests, related to T&amp;D project work, including GRC/TO filings to the CPUC.</li> </ul> <p><b>System Support:</b></p> <ul style="list-style-type: none"> <li>• Act as the User Rep in developing, testing, and troubleshooting technical issues within SAP/BW system, for the Department.</li> <li>• Serves as the Department Hot Line, for resolving technical bugs and systems errors. This involves working with programmers in ISTS; developing and testing solutions; or creating new BW reports; and communicating resolutions.</li> <li>• Develop and provide SAP/BW training to the Department.</li> <li>• Act as the Project Management User Rep, for all new SAP developments and enhancements, that impact Project Management work.</li> </ul>
<p><b>Qualifications</b></p>	<p>A bachelor's degree from an accredited college or its equivalent in education and experience, plus 5 years as a Project Controls Analyst; or 7 years PG&amp;E experience in transmission, distribution, business planning, accounting, and/or finance; or 8 years of related experience if hired externally. CAPM or PMP Certificate desired.</p>

## **Attachment C: Project Types by Career Stage**

### **Energy Delivery Project Services - Gas and Electric Transmission and Distribution**

#### **Associate PM**

- Distribution substation equipment replacements (e.g. switches, circuit breakers and circuit switchers).
- Distribution substation distribution bank replacements
- Distribution electric overhead relocation and reconductoring.
- Electric transmission wood pole relocations
- Generator Interconnection relay work
  
- Distribution gas relocation.
- GPRP and copper services
- Gas meter protection
- Gas compressor station in-kind equipment replacements.
- Gas storage station in-kind equipment replacements.
- Gas metering and regulation station (greater than 60 psi) in-kind equipment replacements.
- Gas transmission pipeline (greater than 60 psi) projects (to include small routine projects such as pipe repairs; replacements; hydro-tests; recoating, and casing contacts).

NOTE: The above gas project types:

1. Do not require development of engineering alternatives, new engineering designs, equipment specifications or work procedures; however, alternative analyses are expected in the job authorization process.
2. Employ commonly used standard designs and specifications.
3. Are straight forward and implementation can be replicated from similar successful projects.
4. Require limited interactions and input from Station or Pipeline Engineering and Maintenance/Operations or similar line work groups.

## **Journey PM**

- Distribution substation circuit breaker installations.
- Distribution substation bank installations
- SCADA installations.
- Distribution underground cable replacement and relocation.
- Rule 20A with one joint trench participant.
- Distribution reliability work.
- New distribution electric capacity circuits.
- New distribution gas capacity pipelines.
- Electric transmission steel relocations.
  
- Gas distribution regulator installations.
- Gas compressor station equipment replacement projects.
- Gas storage station equipment replacement projects.
- Gas metering and regulation station (greater than 60 psi) equipment replacement projects.
- Gas transmission pipeline (greater than 60 psi) projects (such as replacement in-kind [reliability]; upgraded operating pressure [reclassification]; new installation [relocation, capacity, Work Required by Others (WRO), and New Business [new or upgraded services for power plants and major commercial/industrial customers]).

NOTE: The above gas project types:

1. Require development of engineering alternatives and business analysis, and include project specific engineering designs, equipment specifications or work procedures.
2. Employ a combination of standard and non-standard engineered designs and specifications
3. Require close interactions with Station or Pipeline Engineering, Maintenance/Operations, Marketing and similar work groups
4. Entail land acquisition or environmental permitting issues requiring interaction with Land and Environmental Services Departments, land owners, and regulatory agencies.
5. Require the PM to provide Project Sponsors and others with recurring status updates and tailboard like presentations.

## Senior PM

- Rule 20A with multiple joint trench participants.
- Generator interconnections transmission line work.
- Electric transmission line reconductoring
- SPS automation work.
- Electric transmission bank/substation work.
- New electric transmission line.
- Greenfield transmission and substation work.
- MPAC projects.
- Static VAR Compensation (SVC) Systems.
  
- Gas compressor station major equipment and system overhauls, replacements, upgrades or new construction projects (such as gas compressors, compressor engines and motors, gas coolers, station/unit controls, electric substations, emergency power systems and environmental equipment retrofits).
- Gas storage station major equipment and system replacements, upgrades or new construction projects (such as gas dehydration equipment, gas odorizer, main gas piping, valves, meter runs, station/process controls, emergency power systems and environmental equipment retrofits).
- Gas metering and regulation station (greater than 60 psi) major equipment and system replacements, upgrades or new construction projects (such installation of main gas metering, regulation and SCADA equipment)
- Gas transmission pipeline (greater than 60 psi) projects (such as large diameter, long distance or built-up pipeline reliability replacements, WRO, relocations, capacity installations, and integrity (pigging) projects. On a project by project basis, these projects entail pipelines serving large geographic core gas customer areas, or large commercial/industrial customers or wholesale gas shippers.

NOTE: The above gas project types:

1. Require development of engineering alternatives and business analysis, and include project specific engineering designs, equipment specifications or work procedures. Non-standard engineered designs and specifications are used. One-off or special techniques, technologies and/or skills may be required to engineer, design, procure and construct the project.
2. Require close interactions with Station or Pipeline Engineering, Maintenance/Operations and Marketing work groups.
3. May entail land acquisition or environmental permitting issues requiring interaction with Land and Environmental Services Departments, land owners, regulatory agencies, as well as other IOUS and CPUC representatives.
4. Routinely require the PM to provide Project Sponsors, upper management and others both with in and outside the Company, with recurring status updates and presentations.

### **Senior Consulting PM**

- Any electric transmission, distribution or substation project requiring CPCN.
- Transmission substation or transmission interconnection or reconstruction involving other utility companies
- Major gas pipeline projects (e.g. 57C) requiring CEQA permitting (i.e., full EIR required, not just negative declaration).
- Gas Transmission new/rebuild compressor stations.
- Program Management work for Gas, Transmission, & Distribution, i.e. a grouping of projects having a common purpose to be implemented over multiple years.

## **Attachment D: Implementation Agreement Project Managers/Project Controls Analysts**

The parties, while recognizing the delay in signing the final letter of agreement for Project Managers and Project Controls Analysts, met on December 18, 2008 to discuss implementation issues. The following agreement will be attached to the signed letter of agreement:

- 1) **Overtime Policy**  
The parties agree that the employees covered by this agreement must receive approval for additional time from the Director of this organization. The Company reserves the right to change the designated approver in the future. The organization will redistribute the current process to employees.
- 2) **CPCN/CEQA**  
The parties agreed the intent of the CPCN and CEQA requirements for the Senior Consulting Project Managers applied to PG&E projects where the Project Manager is responsible for managing the environmental assessment and work necessary for obtaining state approval for the CPCN permit or CEQA.
- 3) **Selection Committee**  
The parties agreed that the Union would identify additional employees by area for the selection committees and the parties would have specific discussions about the selection committees for the new Senior Consulting Project Managers.
- 4) The parties agreed to grandfather, by separate agreement, the vacation of an individual.