Cape Light Compact Management, Tracking, and Reporting System

Request for Proposals - Questions and Answers

Set #4 posted on www.capelightcompact.org on 1/12/2015

Questions that have been received are listed and numbered here with italics. Answers are listed and numbered below each question.

Question 4.1: Sec 2 - Regarding the management for various user types. Will there need to be partitioning of data between utility users, vendors, and any other 3rd party agencies who might have access to the database? Meaning; will there need to be rules in place to enable vendors to collaborate on programs, or, will all vendors be partitioned and unable to view projects that other vendors are working on? Please elaborate.

Answer 4.1: In the current structure of programs, all vendors are partitioned and unable to view project that other vendors are working on.

Question 4.2: Sec 3.1 - The Compact indicates the need to migrate all historic data from 2001 to 2015 - over 15,500 energy assessments, measure installations, quantities, costs, applicable incentives and energy savings for residential, business and government customers. How do you plan to use historic data? Do you require past calculations, measure tables, etc., or can CLC utilize summary project and savings data? Please elaborate.

Answer 4.2: The historical information will be used in a couple of different ways. For customer service, the Compact should be able to look up a customer record to review past participation. For evaluation of initiatives, data may be queried from the system. For regulatory purposes, the historical data may be exported. For these historical purposes, the Compact can utilize summary project and savings data. Ideally, there would be detail information for 2014 and 2015, but the summary would suffice for any data before 2014.

Question 4.3: Sec 3.1 - Please clarify the use-cases regarding village mapping/searching by zip code. Please provide an example of the scenario where a village is used.

Answer 4.3: Villages (and not necessarily towns) are included in the master files from Northeast Utilities. These villages need to be mapped to each town. So, for example, a building with an address in Hyannis (a village) should be mapped Barnstable (as the town).

Question 4.4: Sec 3.2 - Regarding the need for a link to or ability to internally maintain the DTRL/TRM. Please elaborate on the ultimate use of the DTRL. Please provide an estimate of the number of measures types and the number of deemed measures, calculated measures, and engineering calculations to be configured by software implementer as part of system configuration.

Answer 4.4: The ultimate use of the DTRL is that it will house the calculations and savings values and other factors that will be needed to compute the savings. There are approximately 150 +/- measures in the TRL, this could change annually depending on the measures being offered at a given time.

Question 4.5: Sec 3.3 - Regarding Customer Master Loading. Please confirm that this is once per month and that there is a single data source.

Answer 4.5: For customer master loading, there is currently a single data source, and it is done once a month.

Question 4.6: Sec 3.3 - Does CLC have an IT staff or the capability of implementing/supporting data interfaces internally, to secure FTP and transfer. Is CLC looking for the vendor to implement and train your staff to manage the transfer of data files, or are you looking to offload this process to the vendor?

Answer 4.6: The Cape Light Compact, as administered by Barnstable County, has IT support from the County. The Cape Light Compact currently maintains some secure FTP sites, and the secure FTP site in connection with the current database is maintained and owned by the Compact. This is a correction from the pre-bid conference call.

Question 4.7: Sec 3.4 - Regarding monthly customer kWh/kW usage with annual subtotals (note that usage records could go back to 2001). What are the use cases for utilizing usage data older than 12-months? Please describe.

Answer 4.7: The Cape Light Compact utilizes the usage records for a variety of purposes. For customer inquiries, call center staff and implementation staff review usage patterns over the past years to help assist in understanding savings from program measures or services. For evaluation, usage is generally pulled by customer to analyze the effects of measures or services on billing.

Question 4.8: Sec 3.4 - Regarding Loc Id and GIS map integration.

- *Please describe the potential use case.*
- *Do you envision some sort of direct link to a GIS system?*

How would the Id Loc ID be obtained and stored in the system? Would the number need to be looked up or would it be entered into the system as part of an account upload?

Answer 4.8: For the Loc ID and GIS map integration, the Cape Light Compact, as part of Barnstable County, could potentially partner with the Cape Cod Commission, which has its own GIS department. As a potential use case, the Compact could layer information on energy with other GIS layers such as historical districts that would help the Compact to better understand any issues with the area. The Compact would also potentially be able identify multi-family units (defined at 5+ units on a property) as mapping can help call center staff to visually identify multi-family properties.

Depending upon whether Northeast Utilities would be able easily capture this data, it could be part of the account upload. If it is not part of the customer master file, it would need to be manually entered.

Question 4.9: Sec 3.4 - Regarding the ability to print a report that shows all customer activity. Can you please provide an example of the report?

Answer 4.9: This is not a current report that can be printed with the current vendor. However, the ideal report would include customer name, address, rate code, account number, historical usage information, and all workorders with dates, measures, costs and savings.

Question 4.10: Sec 3.6 - Regarding the Near-Term Element, the ability to add a "tag" to the customer file that would then be assigned to a staff member or vendor. Please describe this use-case in more detail. What specifically does "tag" a "customer file" refer to. Is this an account record or other record type? Is this assigning an activity or account to another stakeholder based on business rules or other factors?

Answer 4.10: The "customer file" refers to the account record or set of records. The "tag" refers to the ability to assign activity to a staff member or vendor. The Cape Light Compact often works on targeted programs where a customer signs up for a "specialized" incentives or services. It would be ideal to be able to "tag" these customers to transfer data to the appropriate parties and to allow staff to mine for data for this group of customers. As such, the activity or account would be "assigned" to another stakeholder based upon business rules.

Question 4.11: Sec 3.7 - Regarding vendor access and data exchange of Customer Master Vendor Export Files and Vendor Invoice Work Package:

- *How many vendors would need to interface and provide daily electronic data transfers? In essence, how many sources of data are going to need to interface with the system?*
- *Is this a single data extract for all vendors or is it specific extract for each vendor?*
- *Are these all implementation vendors or are there trade allies as well?*
- *Do you expect this number to change?*
- *Are you open to changing the format of data files to CSV?*

Answer 4.11:

- Two vendors are currently interfacing with the database and providing daily electronic data transfers, but it is envisioned that there may be more vendors added. There are six vendors that upload invoice packages to the secure FTP site.
- In the current vendor exchange with the two vendors, one vendor has a daily data exchange where the vendor receives the enrollments for customer assessments with valid workorders. The vendor uploads daily interactions (or notes) regarding the customer. The vendor then uploads the invoice to the secure FTP site. The other vendor has direct access to the database, and they are currently able to enter interaction notes directly into the system.
- Those accessing the export files and the invoice work packages are all implementation vendors.
- This number may change over time as initiatives change.

- The Compact is open to changing the format of the data files to CSV; however, this will change the process for the vendors, who will need to change their packages.

Question 4.12: Sec 3.7-8 - Please describe invoice data transfer process and invoice data entry. Are you looking to utilize the DSM system as the invoice generation and processing system of record or are invoices being handled by some other system and the DSM system to store invoice details?

Answer 4.12: The invoices are generated by the vendor directly to the Compact. The data files include measures or services that were installed with costs and savings. Therefore, the DSM system stores the invoice details.

Question 4.13: Sec 3.7 - Please clarify what is meant by 'providing updates and customer interactions without a current work order to alert them of an incorrect match.'

Answer 4.13: This refers to vendors who may be tracking on an incorrect or inactive account number or the lack of a current workorder. It is desirable for the database to automatically provide alerts on incorrect matches.

Question 4.14: Sec 3.7 - Regarding the Longer-Term Element, 'the ability to have a module where members of the public would be able to decide upon criteria and pull reports.' Who are the 'members of the public' in this context? Anonymous users with public access to a web portal? Ratepayers who would login to the system with credentials?

Answer 4.14: The Cape Light Compact participates in statewide energy efficiency efforts, and there has been some interest in providing greater transparency on aggregated data. The potential members of the public would be anonymous users with public access to a web portal, but the criteria would be limited to set items.

Question 4.15: Sec 3.7 - Regarding the ability to automatically load reports to the Compact's website.
- *Please describe the use-case for this.*

Does CLC envision publishing a report to the web site that pulls information directly from the system or having the ability to pull a report from the system and have it available for download?

Answer 4.15: The Compact produces the town reports that are posted to the web site at www.capelightcompact.org/reports. These reports are currently generated by the database. It would be ideal if these are automatically loaded to the Cape Light Compact's website. The current situation is such that the Compact has the ability to pull a report from the system and upload it manually, but it would be preferable to publish a report to the website that pulls information directly from the system.

Question 4.16: Sec 3.7 - Regarding the long-term element, 'In addition to the necessary element, for the quarterly reports, other savings (such as benefits) need to be calculated using the DTRL". Please describe some of the "other" benefits that need to be calculated.

Answer 4.16: .In addition to savings, the DTRL provides non Energy benefits, Non-Resource Impacts such as O&M benefits, Admin costs, etc.   The DTRL also includes impact factors.

Question 4.17: Sec 3.8 - Regarding the Compacts' desire for outside contractors or customers to be able to input rebate information into the system to be verified by staff.

- *Please describe the desired use case.*
- *Are these implementation vendors entering data directly into the system for application and work orders?*

Do you envision a portal where ratepayers can apply for programs online?

Answer 4.17: The Compact has an interest in streamlining the customer experience. As an example, some business customers work directly with a contractor to install measures. Ideally, the contractor or customer would be able to enter the data required for the rebate application. This information would be verified by staff and then accepted into the system, which would obviate the need to manually enter the data. At this time, the Compact is not expecting ratepayers to apply for programs online through the database as there is a statewide processing vendor that provides the bulk of rebates in the residential sector. They currently provide the portal and the processing for online rebate processing.

Question 4.18: Sec 3.10 - CLC indicates the desire to incorporate planning elements and documents into the tool. Is this referring to a modeling or diagram tool in the system to perform cost benefit tests and the like? Please describe.

Answer 4.18: Yes, the data comes from the Benefit Cost Modeling tool excel spreadsheet and we would to import certain values into the database to be used for future comparison to actual data.

Question 4.19: Can you please estimate the total number of vendor users that will access the system to upload files, input data and access program information, run reports, etc?

Answer 4.19: The current number of vendors is six. There are generally two users per vendor.