

## Q&A for Data Management and Customer Call Center Services RFP

1. 1.b. "Obtain all customer usage data, including hourly interval usage data at billing level quality, from PG&E's Metered Data Management Agent ("MDMA") server and related SCE server to allow for timely billing (according to PG&E and SCE requirements) of each MBCP customer (867 Electronic Data Interchange Files)."

Since hourly interval usage data at billing level quality is currently only available for MV90 customers, do you expect bill calculations to rely upon any other source beyond the EDI 867s provided by PG&E and SCE?

Interval data should be used when available and usable, otherwise EDI 867 files would function as the main source of usage data.

2. 1.e. "Provider shall participate in the Customer Data Acquisition Program ("CDA") beta testing for Smart Meter data sharing as MBCP's Data Manager. "

May we get more information regarding participation in the beta testing for Smart Meter data sharing so we better understand the scope?

This item refers to PG&E's 3<sup>rd</sup> Party access platform Share My Data. More information can be found at [https://www.pge.com/en\\_US/small-medium-business/energy-alternatives/alternatives-to-pge/third-party-data-access.page?WT.mc\\_id=Vanity\\_sharemydata](https://www.pge.com/en_US/small-medium-business/energy-alternatives/alternatives-to-pge/third-party-data-access.page?WT.mc_id=Vanity_sharemydata)

3. 2.b. "Submit a monthly generation extract file to the Western Renewable Energy Generation Information System ("WREGIS") on MBCP's behalf, which will conform to the characteristics and data requirements set forth in the WREGIS Interface Control Document for Qualified Reporting Entities."

Are (or do you expect that) MBCE feed-in-tariff projects CAISO metered?

MBCP currently has no Feed in Tariff (FIT) program, with no planned one in the immediate future. Therefore, no Qualified Reporting Entity (QRE) responsibilities in this area foreseen at this time but may be added later. MBCP would expect most FIT generators to be CAISO-metered, and thus the CAISO would perform the QRE function. In the event this is not the case we would need our data service provider to be able to perform the QRE function.

4. 6.a. "Provider shall complete transitional services within 180 days as defined in the current data management contract unless an extended period is mutually agreed upon by MBCP and the provider."

At what point during the 180-day transition period do you expect your new service provider to start interacting with your customers?

The goal would be for the new provider to be interacting with our customers at the time of enrollment for the customers in the Cities of San Luis Obispo and Morro Bay.

5. 6.b.i. "Until such time that billing services are transferred to the provider, validation of the current data vendor's billing and reporting is to be run in parallel to ensure accuracy of said billing and reporting."

Will the current data manager provide all data exchanges with PG&E during the transition period?

Yes, the current data service provider will provide all data exchanges with PG&E during the transition.

6. 6.c. "Provider shall review billing since inception of MBCP to determine if there are any gaps or errors in billing that will need resolving to ensure complete and accurate billing of all customers since enrollment. "

What access to the current data manager systems, data, technical and process documentation will be made available in order to identify gaps or errors that will require resolution since enrollment?

The awarded data service provider will have access to all reporting, records and historical customer data since inception of MBCP.

7. 8.a. "Provider shall provide MBCP or MBCP's designated Scheduling Coordinator ("SC") with Settlement Quality Meter Data ("SQMD") as required from SC's by the California Independent System Operator ("CAISO"). "

Do you anticipate that SMUD will use our current SQMD methodology or that we will need to develop something new? If new, can you provide a description or requirements?

Provided vendor's current SQMD process is acceptable to the CAISO and will be able to pass their audit requirements, then MBCP can accept the current process.

8. The RFP calls for a broad number of software solutions that could be on separate platforms with the ability to integrate with one another. Would MBCP allow a proposal that provides one or more of the scope items (but not all) with demonstrated ability (through real-time API) to integrate with other solutions?

MBCP would like a turnkey product that encompasses all the required products and services but would welcome a proposal that meets all needs.

9. What is the current call volume for the contact center during non-enrollment periods? (either per day/week/month)

MBCP experienced an average of 970 calls per month in the last 7 months but have stabilized at roughly 400 calls per month in the last 2 months.

10. What was the call volume during the previous enrollment period? (either per day/week/month)

MBCP experienced an average of 975 calls per month during initial enrollment.

11. What is the current number of customers served by MBCP?

MBCP currently serves 272,000 customers in the Counties of Monterey, San Benito and Santa Cruz.

12. What is the expected growth rate of customers served by MBCP?

MBCP expects to expand to the Cities of San Luis Obispo and Morro Bay in January of 2020 and expect a 0.25% load growth from year to year.

13. Can vendors provide alternative proposals that may be more efficient or cost-effective while providing services similar to those outlined in the RFP?

Proposals that include all required products and services will be accepted. Only proposals that meet all service needs will pass onto the negotiation phase.

14. Has MBCP determined the necessary functional and non-functional business requirements for both the CRM and CIS systems? If so, are they available for review?

Please refer to Section III of the RFP which details out the requirements MBCP is requesting for the Customer Information System for the purposes of the data management. Any future CRM and CIS needs will be addressed in a separate RFP.

15. What is the compelling event necessitating implementation of a CRM and CIS system within 60 days of contract?

This is in order to achieve a seamless transition period and ensure business continuity.

16. Will the current vendor provide any transition services to the successful bidder?

Yes, the current vendor will provide transition services to the successful bidder for a maximum period of 180 days, more if needed and mutually agreed upon by all parties.

17. How many QREs projects does MBCP currently have? What is the anticipated need for QRE projects over the next 24 months?

MBCP currently has no FIT program, with no planned one in the immediate future. Therefore, no QRE responsibilities in this area foreseen at this time but may be added later.

18. What call volumes, on an hourly basis, does the call center currently experience.

Call center receives an average of 4 calls per hour – 40 calls per day – 970 calls per month.

19. What is the current volume of customer inquiries received through email and web-portal?

Email questions and website contact form submissions average a combined 25 inquiries a week. During enrollments volume is expected to double.

20. What languages have been requested so far in MBCE's territory?

The only language requested to date is Spanish, but MBCP recognizes there are other commonly used languages that may become necessary in the future.

21. Would MBCP staff please clarify if the intent is to have the data manager send the list to the MBCP designated printer or for the data manager to send the letters directly?

The mailing list should be sent to the MBCP designated printer (outside vendor).

22. Can Calpine assume the previous provider to provide all transactional data in a standard format?

Yes, assuming that the standard data format is that which it is received and sent to PG&E (EDI files).