

1.0 INTRODUCTION, BACKGROUND and SCOPE

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INTRODUCTION

The Connecticut Light and Power Company (“CL&P”), Yankee Gas Services Company (“YGS”), each individually d/b/a Eversource Energy, The United Illuminating Company (“UI”), Connecticut Natural Gas Corporation (“CNG”) and The Southern Connecticut Natural Gas Company (“SCG”) are investor-owned utilities (each a “Company” and collectively referred to as “Companies”) in Connecticut.

In response to Order No. 15 in the Final Decision (attached to this RFP as Attachment H) of the Public Utilities Regulatory Authority (“PURA” or the “Authority”), dated 4/20/2022, in Docket No. 21-07-01 Application of The Connecticut Light and Power Company and Yankee Gas Services Company, each Individually D/B/A Eversource Energy, The United Illuminating Company, Connecticut Natural Gas Corporation, and The Southern Connecticut Gas Company for Approval of Arrearage Forgiveness Program 2021-2022, and the Authority’s ruling thereon, the Companies release this Request for Proposal (“RFP”). The Companies are seeking a supplier to provide a solution for a user-friendly, web-based centralized data reporting platform, providing accurate reporting of their Energy Affordability data as further described herein (the “PURA Data Dashboard”). The statewide PURA Data Dashboard shall display program data in a centralized location through a link on the EnergizeCT website, which is populated with relevant information from the Companies’ existing tracking and reporting systems. The PURA Data Dashboard shall provide numeric data, tables, charts, and graphs of the relevant data, which include but is not limited to, information related to arrearages, payment arrangements, low-income programs, service terminations, etc. For further information, please refer to Pages 9-12 of the Final Decision, Attachment H. As referenced in the Final Decision, the Companies will also explore whether a customized PURA Data Dashboard that leverages existing commercial business intelligence tools could be designed and developed through a public-private partnership between the Companies and a University as the supplier.

The PURA Data Dashboard will include overall individual and combined program summaries for all the Companies and will integrate data through a manual file secure exchange process from existing Company data systems to report and graph information as further designed herein for the Companies. The central data reporting platform will be a user-friendly experience and shall also support the advancement of the Authority’s Equitable Modern Grid objectives as further defined below.

The platform must be a streamlined, centralized, user-friendly utility data reporting platform that can be modified to accommodate expanded reporting on several program-based and other performance-based reporting requirements that spans multiple dockets. The PURA Data Dashboard shall be designed and developed and implemented in a prudent manner to accommodate additional dashboard configurations and/or future expanded reporting on the following programs, at a minimum: Residential Renewable Energy Solutions, Non-Residential Renewable Energy Solutions, Energy Storage Solutions, Non-Residential Renewable Energy Solutions, Energy Storage Solutions, and the Electric Vehicle (“EV”) Charging Program.

EXPECTATION

The PURA Data Dashboard will be designed, developed, and launched in no more than six (6) months from the date the contract is executed. The development of the PURA Data Dashboard will include input from PURA's Department of Education, Outreach, and Enforcement ("EOE"). PURA will require the Companies to project timeline updates with key implementation milestones to include in compliance filings for key implementation milestones throughout the project's timeline. The Companies will need support from the Award Recipient to comply with these filings.

1.2 PURPOSE AND OBJECTIVES

Purpose

The Companies' primary objective in issuing this RFP is to gather competitive proposals from solution providers ("RFP Participants") who are experienced with designing a solution platform and dashboard that meets or exceeds PURA's objectives set forth in the Final Decision.

RFP Participants will be evaluated based on the depth of their responses and are expected to respond to this RFP in the format described herein.

1.3 SCOPE AND SOLUTION BACKGROUND

Overview

The Statewide PURA Data Dashboard will be utilized by the following types of users:

1. External Parties/General Public – Legislature, PURA, Office of Consumer Counsel ("OCC"), Department of Energy and Environmental Protection ("DEEP"), Low Income Home Energy Assistance Board ("LIHEAB") and Low-Income Advocates
2. Internal Parties – Company Management (CL&P, UI, YGS, CNG, SCG)

The PURA Data Dashboard shall be a multi-user tool that will be populated with historical data from the Electric Distribution Companies ("EDCs") and Local Distribution Companies ("LDCs") and should be scalable, secure, and capable of capturing information from user input. The solution shall be flexible as well as functional, and business rules should be able to be changed without having to engage in a large-scale rewrite of code. The PURA Data Dashboard will be integrated into the current EnergizeCT.com website or any successor websites. The vendor will be responsible for integration of all materials into those website(s).

The PURA Data Dashboard for reporting will include information from each stand-alone Company and the combined program performance. The PURA Data Dashboard shall track overall program performance metrics by the Companies, including, but not limited to, all data points on Attachment I, Reporting Data Template, the attached excel file.

The required Program Summaries include, but are not limited to:

- i. Reports – Required reporting is listed on Pages 66 to 71, Order Nos. 47 through 66 of Attachment H, an excerpt of which is provided below:

Excerpt Attachment H, Final Decision, along with its Exhibit 4 to Order 65, Systems Benefit Charge attached to this RFP as Attachment J:

Please note – dates within Attachment H, as shown below are for the Companies to provide PURA with data, not for award recipient.

47. (Data Reporting) No later than June 15, 2022, and monthly thereafter, the Companies shall file a report to the Authority containing the following information regarding service terminations for non-payment for the preceding month, broken down by residential hardship customers by type (financial hardship only, medical protection only, medical protection and financial hardship), residential nonhardship customers, and non-residential customers:

- a. The number of transition/soft termination letters sent that month;
- b. The number of customers contacting the Company regarding payment (or establishing a payment arrangement/hardship) between the transition/soft termination letter and the termination notice and:
 - i. How many of these customers paid their account balances;
 - ii. How many of these customers entered into payment arrangements;
 - iii. How many of these customers were designated hardship;
- c. The number of initial termination notices sent that month;
- d. The number of customers contacting the Company regarding payment (or establishing a payment arrangement/hardship) between the initial termination notice and the termination and:
 - i. How many of these customers paid their account balances;
 - ii. How many of these customers entered into payment arrangements;
 - iii. How many of these customers were designated hardship;
- e. The number of final termination notices sent that month;
- f. The number of customers contacting the Company regarding payment (or establishing a payment arrangement/hardship) between the final termination notice and the termination and:
 - i. How many of these customers paid their account balances;
 - ii. How many of these customers entered into payment arrangements;
 - iii. How many of these customers were designated hardship;
- g. The number of service terminations performed that month;
- h. The number of customers contacting the Company regarding payment (or establishing a payment arrangement/hardship) after termination occurred and
- i. How many of these customers paid their account balance;
 - ii. How many of these customers entered into payment arrangements; and
 - iii. How many of these customers were designated hardship.

48. (Data Reporting) No later than January 15, 2023, and annually thereafter, the Companies shall file a report to the Authority that contains an annual summary of the information required in Order No. 47.

49. (Data Reporting) No later than June 15, 2022, and monthly thereafter, the Companies shall continue to file a report to the Authority containing the following information for the preceding month:

The aggregate number of service terminations, disconnections, and reconnections for the preceding month, broken down by customer class, hardship status, town, and zip code as applicable. For the purpose of this and all other required reports, service termination is defined as an interruption or curtailment of service consistent with interruption pursuant to applicable statutes, regulations and approved tariffs. Disconnections shall mean the voluntary discontinuance of service to an individual utility customer.

50. (Data Reporting) No later than January 15, 2023, and annually thereafter, the Companies shall continue to file a report to the Authority that contains an annual summary of the information required in Order No. 49 and include the number of customers whose service was terminated two or more times during the preceding calendar year broken down by customer class, hardship status, town, and zip code.

51. (Data Reporting) No later than June 15, 2022, and monthly thereafter, the Companies shall continue to file a report to the Authority that contains the following information regarding customer participation on arrearage forgiveness programs and other payment arrangements for the preceding month, broken down by residential hardship customers by type (financial hardship only, medical protection only, medical protection and financial hardship), residential non-hardship customers, and non-residential customers, with a breakdown provided by payment arrangement type (e.g., MPP, New Start or Bill Forgiveness Program, flexible payment arrangement, COVID-19 Payment Plan, etc.).

- a. The number of payment arrangements in effect currently;
- b. The number of renegotiated payment arrangements with customer who indicate their inability to pay the monthly amount presented to them;
- c. The number of failed payment arrangements;
- d. The average and median repayment terms for plans in effect;
- e. The average and median repayment amount for plans in effect;
- f. The repayment terms for failed payment arrangements;
- g. The repayment amount for failed payment arrangements; and
- h. Total amount of receivables for payment arrangements currently in effect.

52. (Data Reporting) No later than January 15, 2023, and annually thereafter, the Companies shall continue to file a report to the Authority that contains the following information regarding customer participation on arrearage forgiveness programs and other payment arrangements for the previous year, broken down by residential hardship customers by type (financial hardship only, medical protection only, medical protection and financial hardship), residential non-hardship customers, and non-residential customers, with a breakdown provided by payment arrangement type (e.g., MPP, New Start or Bill Forgiveness Program, flexible payment arrangement, COVID-19 Payment Plan, etc.).

- a. The number of customers participating in each program;
- b. The number of successful program completions;
- c. The number of program participants removed from each program due to non-payment; and
- d. The payment amount of each customer removed from each program due to non-payment.

53. (Data Reporting) No later than June 15, 2022, and monthly thereafter, the Companies shall continue to file a report to the Authority that contains the total number of residential customers and the percentage of residential customers coded for financial hardship only, medical protection only, medical protection and financial hardship, provided separately, as well as total number of such hardship customers coded for the preceding calendar year, broken down by company.

54. (Data Reporting) No later than June 15, 2022, and monthly thereafter, the Companies shall continue to file a report to the Authority that contains the following information on accounts receivable and write offs for the preceding month, to be submitted as a rolling history:

- a. Total number of residential accounts with receivables broken down by age, financial hardship only, medical protection only, medical protection and financial hardship, non-hardship status, and by company;

- b. *Total amount of the receivables, broken down by age, financial hardship only, medical protection only, medical protection and financial hardship, non-hardship status, and by company;*
 - c. *The number of residential accounts that were written off broken down by age, financial hardship only, medical protection only, medical protection and financial hardship, non-hardship status, and by company; and*
 - d. *The amount of residential accounts that were written off broken down by age, financial hardship only, medical protection only, medical protection and financial hardship, non-hardship status, and by company.*
55. *(Data Reporting) No later than January 15, 2023, and annually thereafter, the Companies shall file a report to the Authority that contains an annual summary of information required in Order No. 54 for the preceding calendar year.*
56. *(Data Reporting) No later than June 15, 2022, and monthly thereafter, the Companies shall continue to file a report to the Authority that contains the following information on customers coded for medical protection for the preceding month:*
- a. *Total number of residential accounts with serious illness protection;*
 - b. *Total number of residential accounts with life-threatening illness protection;*
 - c. *A breakdown on the duration of life-threatening illness protected accounts (i.e., 0-6 months, 7-12 months, 1-3 years, 3+ years);*
 - d. *Total number of residential customers terminated for non-payment that subsequently claim medical protection; and*
 - e. *Total amount of receivables, broken down by age, by company and by type of medical protection.*
57. *(Data Reporting) No later than January 15, 2023, and annually thereafter, the Companies shall continue to file a report to the Authority that contains an annual summary of the information required from Order No. 56 for the preceding calendar year.*
58. *(Data Reporting) No later than June 15, 2022, and monthly thereafter, the Companies shall file a report to the Authority that contains:*
- a. *Average speed of answer;*
 - b. *Average handle time;*
 - c. *Number of abandoned calls;*
 - d. *Abandoned call rate;*
 - e. *Transaction completion rates with IVR;*
 - f. *Average number of customer service representatives (CSR);*
 - g. *Ratio of calls to CSR;*
 - h. *First Call Resolution Rate; and*
 - i. *Quality assurance score.*
59. *(Data Reporting) No later than January 15, 2023, and annually thereafter, the Companies shall file a report to the Authority that contains the success rates of all residential and non-residential payment plans for the preceding year, first broken down by payment plan type, then further broken down by town and zip code, including data on the mean and median monthly payment amounts and, where applicable, length of payment plans, broken down by plans that are less than six months, plans between six months and one year, and plans that are longer than one year, and the corresponding success rate of each length subset.*

60. (Data Reporting) No later than January 15, 2023, and annually thereafter, the Companies shall file a report to the Authority that contains the annual average and median arrearage balance per customer for customers who were coded hardship and whose service was later terminated, broken down by customers coded for financial hardship only, medical protection only, and customers coded with both financial hardship and medical protection, for the preceding calendar year.

61. (Data Reporting) No later than September 15, 2022, and annually thereafter, the Companies shall file a report to the Authority that contains the number of service terminations occurring within four months of the conclusion of the winter moratorium (i.e., May 1) in the current year for customers who were coded hardship during the winter moratorium, broken down by customers coded for financial hardship only, medical protection only, medical protection and financial hardship, and indicating the number of customers who enrolled in MPP and whose service was subsequently terminated.

62. (Data Reporting) No later than June 15, 2022, and monthly thereafter, the Companies shall file a report to the Authority that contains the estimated percentage and number of calls the Companies' CSRs receive from customers inquiring about payment arrangements and other forms of bill assistance, based on a sampling of calls.

63. (Data Reporting) No later than January 15, 2023, and annually thereafter, the Companies shall file a report to the Authority that contains for both residential and non-residential customers the number, mean, and median of security deposits required annually by town and by zip code for the preceding calendar year.

64. (Data Reporting) No later than November 15, 2022, and annually thereafter, the Companies shall file a report to the Authority that contains, broken down by each Community Action Agency, for the preceding program year.⁴⁷

- a. Number, mean, median, and total amount of Connecticut Energy Assistance Program (CEAP) awards received on behalf of customers;
- b. Number, mean, median, and total amount of CEAP awards that are applied to EDC and LDC customer arrearages;
- c. Number, mean, median, and total amount of CEAP awards that are applied to EDC and LDC customer accounts without an arrearage at the time of the CEAP award, as available;
- d. Number of customer applications for CEAP;
- e. Number and amounts of customer CEAP applications that were rejected or otherwise not processed, and reason or for such rejection;
- f. Number of customer applications for CEAP who enrolled in MPP but failed to receive CEAP by a CAA; and
- g. Number of customers enrolled in MPP by the EDCs and LDCs, and the number of customers enrolled in MPP by CAA.

65. (Data Reporting) No later than March 1, 2023, and annually thereafter, the EDCs shall continue to file a report to the Authority that contains the company's Systems Benefit Charge supporting (Exhibit 4) filed annually in PURA's annual review of the rate adjustment mechanisms proceedings.

66. (Data Reporting) No later than June 15 of each year, in their AFP Plan application in the respective Energy Affordability Annual Review and as part of the data dashboard, the following arrearage forgiveness program data, on an annual basis:

- a. *The number of customers designated financial hardship only, medical protection only, and financial hardship and medical protection who participated in MPP (and whether the customer was enrolled in a Below Budget Payment (BBP) arrangement), New Start, and/or the Bill Forgiveness Program, provided separately, and broken down by town and by zip code, as well as provided in aggregate;*
- b. *The participation and program success rates for MPP (separated by customers enrolled on a BBP or not), New Start, and Bill Forgiveness Program, broken down by town and zip code, as well as provided in aggregate;*
- c. *Success rates of customers enrolled on BBPs through MPP;*
- d. *Success rates of MPP participants who are not enrolled on BBPs, including the mean and median monthly payment amounts;*
- e. *The total number of customers who were approved for the minimum BBP arrangement through MPP using a Below Budget Worksheet, including what the approved BBP amount was, and the number of each that have completed each phase of MPP (i.e., the number of customers completing the phase, not only the number of customers reducing their balance or reducing their balance to \$0);*
- f. *The total number of customers participating enrolled in MPP but not on a BBP, and the number that have completed each phase of MPP (i.e., the number of customers completing the phase, not only the number of customers reducing their balance or reducing their balance to \$0); and*
- g. *The total number of customers automatically enrolled on a BBP, and the number that have completed each phase of MPP (i.e., the number of customers completing the phase, not only the number of customers reducing their balance or reducing their balance to \$0).*

⁴⁷ *In accordance with Order No. 10, of the Authority's Interim Decision dated October 13, 2021, in this proceeding, the Companies may include appropriate reporting requirements from the Community Action Agencies as part of their proposed Memorandum of Understanding*

- ii. **Graphs** – The Data Dashboard shall be able to graph -
 1. Individual EDC or LDC Performance
 2. Individual Program Performance
 3. Combined Electric Company Program Performance
 4. Combined Natural Gas Company Program Performance

1.3.1 Project Background & Overview of The Companies Service Requirements

PRIMARY EXPECTATIONS OF SOLUTION AND BIDDER

SOLUTION:

- 1 Will easily integrate data from Company-provided excel files via secure file exchange process;
- 2 Ensure data flows to PURA Data Dashboard will be web-based
- 3 Companies will be able to allow access to PURA Data Dashboard to outside parties, e.g. legislators, PURA, OCC, DEEP, LIHEAB, low income advocates, and the general public
- 4 Will provide a user-friendly interface of data in numeric and graphic formats for all constituencies (regulatory, consumers, and program administrators) with ability to import, export and print.
- 5 Must be branded to the Companies' approval.

6 Must have administrator seats provided to each of the Companies

BIDDER:

- 1 Must follow all laws and regulations
- 2 **Information Technology Security** – the bidder shall complete and submit all documents as required by the Companies' Information Technology Security Department's requirements.
- 3 Must provide a competitively priced solution.
- 4 Must provide mocked-up visuals of PURA Data Dashboard report and graph output, where appropriate, in addition to providing live demonstration of proposed solution.
- 5 Must deliver project deliverables for a Launch Date - Within six (6) months of contract execution.
- 6 Must be supported by a knowledgeable and experienced project manager.
- 7 Short listed suppliers may be required to provide a presentation, to any of the users previously referenced, of proposal and demonstration of PURA Data Dashboard outputs as part of the Companies' review process.
- 8 **Project Schedule** – Bidders shall submit a detailed project implementation completion schedule which includes meetings with Companies, testing and remediation cycles and periodic check points, as further defined in Section 4.4 below.
- 9 Be cognizant that The Companies require the right to review credentials prior to the engagement and to request replacement of personnel as deemed necessary.

THE COMPANIES' RESPONSIBILITIES

The Companies' responsibilities are as follows

- Provide a primary contact to serve as project manager for the duration of the project.
- Provide all necessary details required to be included in the PURA Data Dashboard.