

1.) List of programs run by each member, whether they are internally run or outsourced to 3rd party implementer, and if they are outsourced who is the implementer. For each program, please indicate whether applications be processed within the proposed system or will data be integrated in from external third-party systems?

Answer: Process Rebates for:

- Utilities Home Incentive Program measures (such as Energy Star Appliances, Electric Vehicle Charging Stations, A/C Tune Ups, etc.) – 3,500 rebates per fiscal year on average
 - Dusk to Dawn Lighting Program – 500 rebates per fiscal year on average
 - Income Qualified Programs – 500 rebates per fiscal year on average
 - And other measures/programs as determined by the Utility – 1,000 rebates per fiscal year on average
- Rebates are currently reviewed by third party and all applications are paper.

2) Are the programs run the same across the utility members or does each member run the same type of programs differently? Is there an opportunity to copy standardized programs across member utilities?

Answer: All are run different

3) How far back do we need to go for historical data purposes, and will the duration and approach be the same for all members?

Answer: 5 years (minimum) to determine if customer qualifies

4) Please provide a list of “approved digital signature software” as noted in section A. ii..

Answer: We currently are working with Attorney’s office and do not have an approved list at the moment.

5) Will the system integrate with utility member CIS systems for account validation and access to billing data? If so, how many CIS integrations will be required? If yes, will integrations with these CIS systems be unidirectional (from utility member solutions to the proposed solution) or bidirectional (supporting rebate bill credits or program participation data transfer to the utility member CIS, etc.)

Answer: It will most likely not integrate with CIS system, utility will provide a data file with all active customers. Later on, this integration may be possible.

6) Will the system integrate with utility member Accounts Payable systems for DSM portfolio financial reporting and/or rebate request transmittal for check processing? If so, how many AP system integrations will be required? If yes, will they be unidirectional to the proposed system (to support the transfer of portfolio financial data for reporting) or bidirectional (to support reporting and rebate request transmittal to the AP systems, etc.)

Answer: At the moment, we do not have these capabilities.

7) Does section C. viii. refer to an online ecommerce marketplace for the purchase of equipment, with instant rebates for qualifying purchases?

Answer: Yes, it refers to an online ecommerce marketplace for the purchase of equipment with instant rebates for qualifying purchases. In addition, customers will be able to apply for other programs offered by the utility, including but not limited to income qualified programs.

8) Regarding section C. ix., how/from where will income eligibility be communicated to the proposed system? Is this program an audit/direct install program with leave behind measures?

Answer: Communication for income eligibility will be communicated by the utility to its customers through various outreach and marketing efforts. Customers will be able to apply for these programs, with potentially minimal income verification in order to be approved for a program. Income qualified programs include but are not limited to direct installation and billing discount programs.

9) Please explain further the requirement for offline paper rebate processing indicated in section C. xii.

Answer: Should the online rebate processing tool be delayed -- the utility would like to have the contractor still process incoming rebates in the same way (currently rebates are submitted by the customer by paper) to avoid a lapse / stop in service.

10) What is the anticipated schedule for this project? Please provide rough/anticipated start date/end dates for the three phases, along with term of the contract.

Answer: The program must be ready for customer interface and rebate processing by January 11th.