BEFORE THE WASHINGTON
UTILITIES & TRANSPORTATION COMMISSION

WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION,

Complainant,

v.

AVISTA CORPORATION D/B/A/ AVISTA UTILITIES

Respondent.

DOCKETS UE-220053, UG-220054, and UE-210854 (Consolidated)

SEBASTIAN COPPOLA ON BEHALF OF THE
WASHINGTON STATE OFFICE OF THE ATTORNEY GENERAL
PUBLIC COUNSEL UNIT

EXHIBIT SC-29

Avista’s Revised Response to Public Counsel’s Data Request No. 234, Revised with Attachment A and Data Request No. 252, with Attachment A on Customer Service IT Projects

July 29, 2022
AVISTA CORP.
RESPONSE TO REQUEST FOR INFORMATION

JURISDICTION: WASHINGTON
CASE NO.: UE-220053 & UG-220054
REQUESTER: Public Counsel
TYPE: Data Request
REQUEST NO.: PC – 234 Revised
DATE PREPARED: 05/20/2022
WITNESS: Jim Kensok
RESPONDER: Karen Schuh
DEPT: Enterprise Technology
TELEPHONE: (509) 495-2293
EMAIL: karen.schuh@avistacorp.com

SUBJECT:

REQUEST:
Pertaining to the digital transformation of the utility, please:

a. Provide the total capital investment in IT/IS systems made from 2018 to 2021 and forecasted for 2022–2024 on a Company-wide basis and the portion applicable to Washington.
b. For each year 2018 through 2024, provide the quantified O&M expense savings across the Company in various departments or functions and the portion applicable to Washington related to the implementation of IT software systems to accomplish the digital transformation. Please provide references where the incremental O&M savings for 2022–2024 are shown in the Pro-forma adjustments.

RESPONSE:
a. There could be many projects that encompass the “digital transformation of the utility” in addition to the Customer at the Center Platform discussed at James M. Kensok, Exh. JMK-1T at 55:15–23 and 56:1–5. However, the Company doesn’t track these projects using a “digital transformation” designation, as it is really more a colloquial term than a term of art. That said, because Customer and the Center projects are transformative in terms of how the utility operates, we are providing the information requested for those, below:

Customer Experience Platform Program
Customer Facing Technology Program
Customer Transactional Systems


b. As noted above, many capital projects could encompass “digital transformation of the utility,” and the Company doesn’t track these projects using a “digital transformation” designation for capital projects. Therefore the Company is unable to designate quantified O&M expense savings across the Company related to digital transformation. Please see Exh. EMA-5 for all detailed direct offsets, or the 2% efficiency adjustment applied to the remainder of Business Case additions, where applicable.
ATTACHMENT A TO AVISTA’S REVISED RESPONSE TO PUBLIC COUNSEL’S DATA REQUEST NO. 234
### Customer at the Center Platform - Capital Additions 2018-2024

<table>
<thead>
<tr>
<th>Business Case</th>
<th>2018 TTP (System)</th>
<th>2019 TTP (System)</th>
<th>2020 TTP (System)</th>
<th>2021 TTP [2] (System)</th>
<th>2022 TTP (System)</th>
<th>2023 TTP (System)</th>
<th>2024 TTP (System)</th>
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<tbody>
<tr>
<td>Customer Experience Platform Program [1]</td>
<td>$ -</td>
<td>$ -</td>
<td>$ 4,960,264</td>
<td>$ 6,578,795</td>
<td>$ 5,999,915</td>
<td>$ 6,300,000</td>
<td>$ 6,300,000</td>
</tr>
<tr>
<td>Customer Facing Technology Program</td>
<td>$ 7,432,557</td>
<td>$ 6,950,848</td>
<td>$ 15,868,642</td>
<td>$ 3,465,629</td>
<td>$ 4,078,651</td>
<td>$ 4,699,999</td>
<td>$ 4,700,000</td>
</tr>
<tr>
<td>Customer Transactional Systems</td>
<td>$ -</td>
<td>$ -</td>
<td>$ 1,704,621</td>
<td>$ 4,004,370</td>
<td>$ 3,859,166</td>
<td>$ 3,500,000</td>
<td>$ 3,749,987</td>
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<tr>
<td><strong>Grand Total</strong></td>
<td><strong>$ 7,432,557</strong></td>
<td><strong>$ 6,950,848</strong></td>
<td><strong>$ 22,533,527</strong></td>
<td><strong>$ 14,048,794</strong></td>
<td><strong>$ 13,937,732</strong></td>
<td><strong>$ 14,499,999</strong></td>
<td><strong>$ 14,749,987</strong></td>
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<tr>
<td>Customer Facing Technology Program</td>
<td>$ 3,534,262</td>
<td>$ 3,313,087</td>
<td>$ 7,995,479</td>
<td>$ 1,660,464</td>
<td>$ 1,948,977</td>
<td>$ 2,245,887</td>
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<td>Customer Transactional Systems</td>
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<td>$ -</td>
<td>$ 814,550</td>
<td>$ 1,791,517</td>
<td>$ 1,672,469</td>
<td>$ 1,791,925</td>
<td>$ 1,791,925</td>
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<tr>
<td><strong>Grand Total</strong></td>
<td><strong>$ 3,534,262</strong></td>
<td><strong>$ 3,313,087</strong></td>
<td><strong>$ 11,180,283</strong></td>
<td><strong>$ 6,775,769</strong></td>
<td><strong>$ 6,660,122</strong></td>
<td><strong>$ 6,928,801</strong></td>
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<tbody>
<tr>
<td>Customer Experience Platform Program [1]</td>
<td>$ -</td>
<td>$ -</td>
<td>$ 748,492</td>
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<td>Customer Facing Technology Program</td>
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<td>$ 1,055,010</td>
<td>$ 2,275,280</td>
<td>$ 521,625</td>
<td>$ 615,459</td>
<td>$ 709,219</td>
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<td>Customer Transactional Systems</td>
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<td>$ -</td>
<td>$ 257,223</td>
<td>$ 614,642</td>
<td>$ 582,339</td>
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<td>$ 565,864</td>
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<td><strong>Grand Total</strong></td>
<td><strong>$ 1,134,316</strong></td>
<td><strong>$ 1,055,010</strong></td>
<td><strong>$ 3,280,995</strong></td>
<td><strong>$ 2,128,992</strong></td>
<td><strong>$ 2,103,170</strong></td>
<td><strong>$ 2,188,015</strong></td>
<td><strong>$ 2,225,738</strong></td>
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Note: Actual transfers to plant (TTP) from 2018-2020 represent both System and Washington allocated TTP using the current filing allocation factors for ease of preparation.
AVISTA CORP.
RESPONSE TO REQUEST FOR INFORMATION

JURISDICTION: WASHINGTON
CASE NO.: UE-220053 & UG-220054
REQUESTER: Public Counsel
TYPE: Data Request
REQUEST NO.: PC – 252

DATE PREPARED: 05/13/2022
WITNESS: Kelly Magalsky
RESPONDER: K. Schultz / M. Halloran
DEPT: Regulatory Affairs

SUBJECT: Capital Additions TY1 and TY2

REQUEST:
RE: Capital Additions TY1 and TY2, Direct Testimony of Kelly E. Magalsky, Exh. KEM-1T at 25–26, 32–33, and 39–40; Kelly E. Magalsky, Exh. KEM-2 at 1 (Electric Transportation and Customer Experience).

Please provide the following information in Excel for each project #1–4:

a. Expand the schedule on page 1 of Magalsky, Exh. KEM-2 to include actual amounts for each year 2016–2021.

b. For each year 2016–2024, provide the detailed component items on which the amounts were spent or will be spent for the forecasted years. For projects #2, 3, and 4, refer to the components shown on pages 25–26, 32–33, and 39–40 of your testimony, Exh. KEM-1T.

c. For each project and components, provide the number of units, quantities and other data supporting the amount spent or to be spent each year 2016–2024.

RESPONSE:

a. Please see PC-DR-252 Attachment A. PC-DR-252 Attachment A summarizes all work that was Transferred to Plant (TTP) in that calendar year. Please note that the “Customer Facing Technology Program” Business Case was approved in 2016 but did not have any work that transferred to plant in 2016.

b. Regarding 2016-2021 calendar year spend, please see PC-DR-252 Attachment B. PC-DR-252 Attachment B summarizes the annual spend on a system basis associated with each respective business case starting in 2016. Regarding Project #1, please see PC-DR-244 Attachment A for forecasted 2022-2024 TTP.

Regarding Project #2-4, for forecasted years of 2022-2024, the items referred to on pages 25-26, 32-33, and 39-40 of the Exh. KEM-1T testimony are still applicable and relevant components/features that we intend to deliver between years 2022-2024, subject to change in the future as priorities change or new requests for functionality are needed. Since the drafting of Exh. KEM-1T, additional items have been prioritized for delivery. The list below includes components/features outlined in Exh. KEM-1T, as well as new items. Please note that this list is updated and reprioritized regularly based on customer and business identified needs and as such, items listed below may be removed or deprioritized at a future date.

a. Customer Experience Platform Program (CXP) 2022-2024 Feature List
   i. Always on Alerts
   ii. Inbound Voice Channel Upgrade
   iii. Energy Assistance Discovery and Enhancements
iv. Customer 360 View/Page Enhancements
v. CSR Email Communication Technology Platform Change
vi. Questline Email Campaign transition
vii. EVSE Commercial Application Process
viii. AMI based Load Disaggregation API Integration
ix. Display of Demand Side Management Residential Rebate status
x. Social Care integration
xi. Commercial Customer Management Tools for Account Execs and Regional Business Managers
xii. Customer Service Representative (CSR) Transaction Execution within Salesforce Platform.

xiii. Next Best Action Recommendations for CSRs
xiv. Case Management Expansion – Claims, Complaints & Vegetation Management
xv. Field Service workflows for Customer Project Coordinators
xvi. Field Service Customer Notifications
xvii. Electric Outage Notification Enhancements
xviii. Implementation of Avista managed SMS communications
xix. Natural Language; Conversational IVR; Chatbots
xx. Customer Feedback/Surveys data storage and reporting
xxi. Implementation of ‘Product Catalog’
xxii. Field Appointment Scheduling

b. Customer Facing Technology Program (CFTP) 2022-2024 Feature List
   i. AMI Load Disaggregation Customer Facing Tools
   ii. Digital Channel Features and Enhancements
   iii. Energy Assistance self-service tools enhancements on myavista.com
   iv. Mobile App Enhancements
   v. Storm Center (customer facing outage map) Upgrade
   vi. Outage Resiliency Phase 2 – improve the resiliency (availability) of our digital channels in the face of high traffic or catastrophic events.
   vii. Residential Demand Side Management (rebate fulfillment) Enhancements
   viii. Start Service Automation
   ix. Myavista.com Chat Functionality Expansion
   x. Business Customer Portal Re-Design and Implementation
   xi. Time of Use self-service tools on myavista.com
   xii. Peak Time Rebate self-service tools on myavista.com

c. Customer Transactional Systems (CTS) 2022-2024 Feature List
   i. New Rate implementation for Time of Use
   ii. New Rate implementation for Peak Time Rebate
   iii. Comfort Level Billing (CLB) Enhancements
   iv. Energy Assistance (Bill Discount) back-end system enhancements
   v. CC&B Application Upgrade(s)
   vi. MDM Application Upgrade(s)
   vii. Tivoli Server Replacement
   viii. Real Time Address Validation Implementation
   ix. Net Metering Paper Bill Presentment
   x. Server Replacement to Redhat 8 OS
c. Regarding Project #1, please see NWEC-DR-028 Attachment A for the number of units installed in 2021 along with supporting information. For 2022-2024, please see PC-DR 244 Attachment A. For Projects #2-4, the Customer Experience Platform Program, Customer Facing Technology Program and Customer Transactional Systems Program, ‘units’ and “quantities” are not measures that are applicable for these business programs and as such we are unable to provide.
ATTACHMENT A TO AVISTA’S REVISED RESPONSE TO PUBLIC COUNSEL’S DATA REQUEST NO. 252
### Exh. KEM-1T Total 2021-2024 Capital Additions

<table>
<thead>
<tr>
<th>WA GRC Plant Group</th>
<th>Project #</th>
<th>Business Case</th>
<th>2016 TTP (System)</th>
<th>2017 TTP (System)</th>
<th>2018 TTP (System)</th>
<th>2019 TTP (System)</th>
<th>2020 TTP (System)</th>
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<th>2022 TTP (System)</th>
<th>2023 TTP (System)</th>
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<tbody>
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<td>Programs</td>
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<td>Actual</td>
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<tr>
<td>1 Electric Transportaion</td>
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<td>Total Programs</td>
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<td>Short-Lived Assets</td>
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<td>2 Customer Experience Platform Program$^{[1]}</td>
<td>$-</td>
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<td>4,960,264</td>
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<tr>
<td>3 Customer Facing Technology Program</td>
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<td>2,294,461</td>
<td>7,432,557</td>
<td>6,950,848</td>
<td>15,868,642</td>
<td>3,465,629</td>
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<td>4 Customer Transactional Systems</td>
<td>-</td>
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<td>-</td>
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<td>1,704,621</td>
<td>4,004,370</td>
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<td>3,500,000</td>
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<td>Total Short-Lived Assets</td>
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<tr>
<td>Exhib. KEM-1T Total 2021-2024 Capital Additions</td>
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</tr>
</tbody>
</table>

$^{[1]}$ Customer Experience Platform Program includes "Strategic Initiatives" TTP in 2020 & 2021.
$^{[2]}$ 2021 TTP reflects actual system calendar year transfers to plant as updated in PC_DR_122.