

**BEFORE THE WASHINGTON  
UTILITIES & TRANSPORTATION COMMISSION**

WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION,

Complainant,

v.

AVISTA CORPORATION D/B/A/ AVISTA UTILITIES

Respondent.

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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**

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

**SUBJECT:**

IS/IT Expense Pro-Forma, Direct Testimony of James M. Kensok, Exh. JMK-1T at 55:15–23 and 56:1–5.

**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

See PC-DR-234 Attachment A for amounts for 2018 – 2024, system and Washington allocated.

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**

PC-DR-234 Attachment A

Customer at the Center Platform - Capital Additions 2018-2024

Business Case	Actual				Forecasted		
	2018 TTP (System)	2019 TTP (System)	2020 TTP (System)	2021 TTP [2] (System)	2022 TTP (System)	2023 TTP (System)	2024 TTP (System)
Customer Experience Platform Program [1]	\$ -	\$ -	\$ 4,960,264	\$ 6,578,795	\$ 5,999,915	\$ 6,300,000	\$ 6,300,000
Customer Facing Technology Program	\$ 7,432,557	\$ 6,950,848	\$ 15,868,642	\$ 3,465,629	\$ 4,078,651	\$ 4,699,999	\$ 4,700,000
Customer Transactional Systems	\$ -	\$ -	\$ 1,704,621	\$ 4,004,370	\$ 3,859,166	\$ 3,500,000	\$ 3,749,987
<b>Grand Total</b>	<b>\$ 7,432,557</b>	<b>\$ 6,950,848</b>	<b>\$ 22,533,527</b>	<b>\$ 14,048,794</b>	<b>\$ 13,937,732</b>	<b>\$ 14,499,999</b>	<b>\$ 14,749,987</b>

Business Case	Actual				Forecasted		
	2018 TTP (WA-Electric)	2019 TTP (WA-Electric)	2020 TTP (WA-Electric)	2021 TTP [2] (WA-Electric)	2022 TTP (WA-Electric)	2023 TTP (WA-Electric)	2024 TTP (WA-Electric)
Customer Experience Platform Program [1]	\$ -	\$ -	\$ 2,370,254	\$ 3,143,666	\$ 2,867,049	\$ 3,010,445	\$ 3,010,445
Customer Facing Technology Program	\$ 3,534,262	\$ 3,313,087	\$ 7,995,479	\$ 1,660,646	\$ 1,948,977	\$ 2,245,887	\$ 2,245,887
Customer Transactional Systems	\$ -	\$ -	\$ 814,550	\$ 1,971,457	\$ 1,844,096	\$ 1,672,469	\$ 1,791,925
<b>Grand Total</b>	<b>\$ 3,534,262</b>	<b>\$ 3,313,087</b>	<b>\$ 11,180,283</b>	<b>\$ 6,775,769</b>	<b>\$ 6,660,122</b>	<b>\$ 6,928,801</b>	<b>\$ 7,048,257</b>

Business Case	Actual				Forecasted		
	2018 TTP (WA-Natural Gas)	2019 TTP (WA-Natural Gas)	2020 TTP (WA-Natural Gas)	2021 TTP [2] (WA-Natural Gas)	2022 TTP (WA-Natural Gas)	2023 TTP (WA-Natural Gas)	2024 TTP (WA-Natural Gas)
Customer Experience Platform Program [1]	\$ -	\$ -	\$ 748,492	\$ 992,724	\$ 905,373	\$ 950,655	\$ 950,655
Customer Facing Technology Program	\$ 1,134,316	\$ 1,055,010	\$ 2,275,280	\$ 521,625	\$ 615,459	\$ 709,219	\$ 709,219
Customer Transactional Systems	\$ -	\$ -	\$ 257,223	\$ 614,642	\$ 582,339	\$ 528,142	\$ 565,864
<b>Grand Total</b>	<b>\$ 1,134,316</b>	<b>\$ 1,055,010</b>	<b>\$ 3,280,995</b>	<b>\$ 2,128,992</b>	<b>\$ 2,103,170</b>	<b>\$ 2,188,015</b>	<b>\$ 2,225,738</b>

[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

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	DATE PREPARED:	05/13/2022
CASE NO.:	UE-220053 & UG-220054	WITNESS:	Kelly Magalsky
REQUESTER:	Public Counsel	RESPONDER:	K. Schultz / M. Halloran
TYPE:	Data Request	DEPT:	Regulatory Affairs
REQUEST NO.:	PC – 252	TELEPHONE:	(509) 495-2482
		EMAIL:	kaylene.schultz@avistacorp.com

**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 NWECA-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**

PC\_DR\_252

Capital Additions for 2016-2024 by Plant Group

Magalsky

WA GRC Plant Group	Project #	Business Case	Actual	Actual	Actual	Actual	Actual	Actual	Forecasted	Forecasted	Forecasted	Exh. KEM-2 Page #	
			2016 TTP (System)	2017 TTP (System)	2018 TTP (System)	2019 TTP (System)	2020 TTP (System)	2021 TTP (System) <sup>[2]</sup>	2022 TTP (System)	2023 TTP (System)	2024 TTP (System)		
<b>Programs</b>	1	Electric Transportation	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 616,426	\$ 2,775,000	\$ 3,900,000	\$ 4,060,000	2
<b>Total Programs</b>			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 616,426	\$ 2,775,000	\$ 3,900,000	\$ 4,060,000	
<b>Short-Lived Assets</b>	2	Customer Experience Platform Program <sup>[1]</sup>	\$ -	\$ -	\$ -	\$ -	\$ 4,960,264	\$ 6,578,795	\$ 5,999,915	\$ 6,300,000	\$ 6,300,000	\$ 6,300,000	10
	3	Customer Facing Technology Program	-	2,294,461	7,432,557	6,950,848	15,868,642	3,465,629	4,078,651	4,699,999	4,700,000	4,700,000	19
	4	Customer Transactional Systems	-	-	-	-	1,704,621	4,004,370	3,859,166	3,500,000	3,749,987	3,749,987	31
<b>Total Short-Lived Assets</b>			\$ -	\$ 2,294,461	\$ 7,432,557	\$ 6,950,848	\$ 22,533,527	\$ 14,048,794	\$ 13,937,732	\$ 14,499,999	\$ 14,749,987	\$ 14,749,987	
<b>Exh. KEM-1T Total 2021-2024 Capital Additions</b>			\$ -	\$ 2,294,461	\$ 7,432,557	\$ 6,950,848	\$ 22,533,527	\$ 14,665,219	\$ 16,712,732	\$ 18,399,999	\$ 18,809,987	\$ 18,809,987	

[1] Customer Experience Platform Program includes "Strategic Initiatives" TTP in 2020 &amp; 2021.

[2] 2021 TTP reflects actual system calendar year transfers to plant as updated in PC\_DR\_122.