



Community Advisory Committee Meeting

Monday, October 18, 2021

6:00pm

<https://us02web.zoom.us/j/84794506189>

Or join by phone:

Dial (for higher quality, dial a number based on your current location):

US: +1 669 900 6833 or +1 346 248 7799 or +1 253 215 8782 or +1 929 205 6099 or +1 301 715 8592 or +1 312 626 6799 or 877 853 5257 (Toll Free)

Webinar ID: 847 9450 6189

Meetings are accessible to people with disabilities. Individuals who need special assistance or a disability-related modification or accommodation to participate in this meeting, or who have a disability and wish to request an alternative format for the meeting materials, should contact the Clerk of the Board at least 2 working days before the meeting at (510) 906-0491 or cob@ebce.org.

If you have anything that you wish to be distributed to the Committee, please email it to the clerk by 5:00 pm the day prior to the meeting.

C1. Welcome & Roll Call

C2. Public Comment

This item is reserved for persons wishing to address the Committee on any EBCE-related matters that are not otherwise on this meeting agenda. Public comments on matters listed on the agenda shall be heard at the time the matter is called. As with all public comment, members of the public who wish to address the Committee are customarily limited to three minutes per speaker and must complete an electronic [speaker slip](#). The Committee Chair may increase or decrease the time allotted to each speaker.

C3. Approval of Minutes from September 20, 2021 (5 minutes)

C4. CAC Chair and Vice-Chair Elections

- C5. CAC Chair Report (15 minutes)**
- C6. Legislative and Regulatory Update (30 minutes, Informational Item)**
Staff will provide the CAC with updates regarding regulatory and legislative items.
- C7. SMUD Contract Amendment (40 minutes, Informational Item)**
Review and discuss SMUD contracts
- C8. CAC Member and Staff Announcements including requests to place items on future CAC agendas**
- C9. Adjournment to Monday, October 18, 2021**



Community Advisory Committee Meeting

Draft Minutes

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If you have anything that you wish to be distributed to the Committee, please email it to the clerk by 5:00 pm the day prior to the meeting.

C1. Welcome & Roll Call

Present: Members: Hu, Laundry, Liu, Swaminathan, Lakshman, Talreja, Pacheco, Muetzenberg, Vice-Chair Franch and Chair Sutter

Excused: Member Eldred

Member Hu served as an alternate for Member Eldred.

C2. Public Comment

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speaker and must complete an electronic [speaker slip](#). The Committee Chair may increase or decrease the time allotted to each speaker.

There were no speakers for Public Comment.

C3. Approval of Minutes from July 19, 2021 (5 minutes)

Member Franch motioned to approve the minutes. Member Talreja seconded the motion which passed 7/0.

Excused: Member Landry

Abstained: Members Hu and Muetzenberg

C4. CAC Chair and Vice-Chair Elections

CAC Chair and Vice-Chair Elections were rescheduled to the October 18, 2021 CAC meeting.

C5. CAC Chair Report (15 minutes)

- Chair Sutter discussed the process by which a decision will be arrived at whether the CAC will resume in person meetings or remain virtual.
- Chair Sutter spoke regarding the options that are being considered to retire the peaker plant near Jack London Square.
- Responding to a question about the status of the call center, Chair Sutter announced that SMUD renegotiations will be discussed at the Board at the October 20 meeting.
- Responding to a question about the status of vehicle electrification, Chair Sutter highlighted two consent items on the September 22, 2021 Board agenda:
 - Consent Item 9. Municipal Fleet Electrification: Frontier Energy CSA Amendment
 - Consent Item 10. CALSTART Consulting Services Agreement

The Committee discussed:

- Reasons why PG&E ended its contract to replace the peaker plant near Jack London Square.

C6. 2020 Power Source Disclosure Annual Report and Power Content Label (20 minutes, CAC Informational Item)

Staff will provide the CAC with information on the 2020 Power Source Disclosure Program Annual Report (PSDR) and the 2020 Power Content Label (PCL).

The Committee discussed:

- How does the Power Content Label compare to the California Utility Average?
- Nuclear energy component in Bright Choice
- Energy Resources as a percentage of total customer base
- Emissions factor for Unspecified Power
- Bright Choice Unspecified Power make-up
- Power Content Label customer education and messaging
- Break down of renewable energy from long-term contracts
- Emissions per megawatt hour calculation
- Bright Choice greenhouse emissions relative to California Utilities Average
- Role of hydroelectric power in power content label

Vaugh asked the hourly component of the power content label, about the impact of drought on hydroelectric power, and about how battery storage is counted on the power content label.

Jessica Tovar spoke regarding the presence of nuclear component on the power content label and asked for a commitment to procure 100% renewable energy.

C7. LMI Electrification (45 minutes, CAC Action Item)

This is an informational item for the board. Staff will describe an opportunity to Invest \$1 M and offer \$400k in incentives to support low to moderate income building electrification in EBCE service area. The CAC will use this as an action item to advise the board on this item for when it does come up as a board action item.

The Committee discussed:

- Number of households this program will cover
- Timeline for dispersal of funds
- Will eligibility criteria adjustments consider changes in access to credit due to Covid?
- What is the plan for marketing and outreach for multilingual, multi-family and renter populations?
- “Low and moderate income” definition
- Budget leverage expectations for LMI Electrification program
- Who repays the loan?
- “Low to moderate-income” in dollar terms
- Outreach to non-English and multi-lingual households
- Possibility to create guarantees that rent will not increase because of LMI Electrification

Ceyda Durmaz Dogan spoke in support of the LMI Electrification program and raised two questions: 1. What happens when building owners don't save enough on their electricity bills to pay back the loan? Is there protection in place that will make sure that people who sign up for this do not end up paying more than expected because of inaccurate payment savings expectations? 2. Will a utility bill payment history be required to sign up for this program?

Vaugh asked if there is an economic benefit to implementing a LMI Electrification program on a neighborhood rather than household basis?

Jim Lutz asked if there are any restrictions on rent increases if rental property was upgraded through the LMI Electrification program. Jim Lutz also asked if the LMI Electrification program designers were working with representatives from cities that have climate action plans. Jim Lutz also asked if this program could be combined with a variety of energy savings programs.

Member Swaminathan motioned to support the LMI Electrification program as an opportunity for EBCE pending program design. Member Pacheco seconded the motion which passed 8/0.
Excused: Members Eldred and Talreja

C8. CAC Member and Staff Announcements including requests to place items on future CAC agendas

JP Ross announced that the Marketing and Account Services team hired a new Program Marketing Manager, Lori Dynes.

C9. Adjournment to Monday, October 18, 2021

OCTOBER 20, 2021

Legislative and Regulatory Update



End of Session Legislative Highlights

- COVID-19 & the Delta variant once again played a big role in slowing things down
 - Bill introductions were limited
 - Hearings were also limited and/or cancelled
- The Gubernatorial Recall election also affected the session
 - Less appetite for tackling controversial issues
- Many energy bills were tabled (2-year bills)
- Budget Bill has some potential opportunities for EBCE

Budget Act of 2021 Highlights for EBCE

- Zero Emission Vehicle Package: \$3.9B
 - Includes ZEV buses, consumer adoption of ZEV, supporting transition of transportation sector, and ZE transit equipment purchases/infrastructure
- Climate Resilience Package: \$3.7B over 3 years
 - Includes funding for community resilience centers/extreme heat and community resilience program, resilience planning, environmental justice initiative
- Cap and Trade Expenditure Plan: \$1.5B GGRF (included in \$3.9B above)
 - Supports low-carbon transportation and ZEV strategy

Future Energy Funding

- Energy and Transportation packages were deferred until next year
 - Discussions will continue this fall and the Administration and Legislature expect to address them in early 2022
- Deferred Energy Package: \$735M to accelerate progress on clean energy goals
- Deferred Transportation Package: \$3.4B including \$1B to enhance connectivity through clean transportation investment in priority transit and rail projects

Bill Tracker - Assembly

Bill #	Author	Description	Status	EBCE Position
AB 33	Ting	Requires CEC to provide grants and loans to local governments to maximize energy use savings and expand installation of energy storage and availability of transportation electrification infrastructure.	Chaptered	SUPPORT
AB 427	Bauer-Kahan	Requires CPUC to establish rules governing the intersection of demand response, energy storage including customer-sited distributed generation plus storage, and RA.	2-year bill	SUPPORT
AB 525	Chiu	Requires CEC to evaluate and quantify max feasible capacity of offshore wind and to establish planning goals for 2030 and 2045.	Chaptered	SUPPORT
AB 843	Aguiar-Curry	Allows community choice aggregators to enter into Bioenergy Market Adjusting Tariff (BioMAT) contracts and recover related costs through the existing nonbypassable charge for the BioMAT program.	Chaptered	SUPPORT
AB 1139	Gonzalez	Requires the CPUC to develop a replacement NEM tariff by 8/1/2022; if none, prescribes successor NEM tariff. Requires any existing NEM customer to be transferred to new tariff 20 years after customer first received NEM service.	2-year bill	OPPOSE
AB 1239	Ting	Requires investigation into causes of demand response market failures and why demand response is not reaching its potential; recommendations to ensure market failures not repeated. Recommendations to CPUC to revise policies governing demand response resources. CEC and CAISO to develop initiatives to achieve all cost-effective demand response by 2030.	2-year bill	SUPPORT

Bill Tracker - Senate

Bill #	Author	Description	Status	EBCE Position
SB 31	Cortese	Requires CEC to identify/implement programs to promote existing & new building decarb. Would authorize expending fed funds for these projects. Would require CEC under EPIC to award funds for projects benefiting electric ratepayers & leading to development of building decarbonization technologies and investments to reduce GHG in those bldgs.	2-year bill	SUPPORT
SB 52	Dodd	Expands sudden and severe energy shortage definition to include de-energization events, constituting state of emergency and local emergency.	Chaptered	SUPPORT
SB 68	Becker	Requires CEC to develop guide for overcoming barriers to electrification of buildings and installation of EV charging equipment. Authorizes CEC EPIC \$ for reducing costs of building electrification.	Chaptered	SUPPORT
SB 99	Dodd	Community Energy Resiliency Act of 2021. Requires the CEC to develop and implement a grant program for local govts to develop community energy resilience plans.	2-year bill	SUPPORT
SB 345	Becker	Requires the CPUC to establish common definitions of nonenergy benefits, incorporate into distributed energy resource (DER) programs and projects, and track nonenergy benefits produced in DER program evals.	2-year bill	SUPPORT
SB 551	Stern	Establishes California EV Authority in the Governor's office, responsible for coordinating state agency activities to deploy EV and zero emission charging infrastructure, create funding/financing tools to support deployments, prioritize equity	2-year bill	SUPPORT
SB 589	Hueso	Requires CEC to identify workforce development and training resources needed to meet EV charging infrastructure goals.	Chaptered	SUPPORT
SB 612	Portantino	Requires electrical corporations to annually offer for the following year an allocation of each product arising from legacy resources that departed load customers currently bear cost responsibility for through the PCIA. Requires the CPUC to recognize and account for the value of all products in the legacy portfolio in determining the PCIA.	2-year bill	SUPPORT



Regulatory Highlights: CAPP

- CA Dept of Community Services & Development (CSD)'s California Arrearage Payment Program (CAPP)
 - Established in AB 135 Budget Trailer bill: Human services omnibus
 - \$1B from CA's share of American Rescue Plan Act funds to address energy debt
 - One-time debt forgiveness in early 2022 for arrears incurred during "pandemic period" (3/4/20-6/15/21)
 - Prioritizes funding for active residential customer accounts with past due balances of 60+ days
 - CAPP funding allocation between IOU and CCA customer arrearages is being determined

Regulatory Highlights: AMP

- CPUC's Service Disconnections Proceeding
 - CPUC Resolution E-5114 (issued Dec 2020) approved 12-month Arrearage Management Plans (AMP)
 - Enrollment has already started and is ongoing
 - CARE/FERA customers with \$500+ of arrearages are eligible
 - With each on-time payment of current charges, AMP forgives 1/12 of the eligible debt owed at the time of enrollment

Regulatory Highlights: COVID Relief Payment Plan

- CPUC's COVID-19 Debt Relief Proceeding
 - CPUC Decision 21-06-036 (issued June 2021) approved 24-month COVID-19 relief payment plans
 - Enrollment begins in Oct 2021; customers can be co-enrolled with CAPP but not with AMP
 - Customers with arrearage aged 60+ days are automatically enrolled in a plan; 100% of their arrears are amortized over 24 months
 - Small business customers with an arrearage of 60-days or more are automatically enrolled with payment terms long enough so that debt payments are no more than 10% of the customer's average bill based on past 24-months, 5% if the business is in a disadvantaged community



CAC Item C7
Staff Report Item 15

TO: East Bay Community Energy Board of Directors

FROM: Taj Ait-Laoussine, VP Technology & Analytics

SUBJECT: Amendment to Master Services Agreement and Task Order No. 2 with SMUD

DATE: October 20, 2021

Recommendation

Adopt a Resolution authorizing the CEO to negotiate and execute, subject to the approval of General Counsel, an amendment to the SMUD Master Services Agreement and an amendment to Task Order No. 2, for the purposes set forth below, for a term ending on December 31, 2024.

Direct Staff to work to evaluate sites for a future customer service center and to report back to the Board of Directors in the first six months of 2022.

Background and Discussion

EBCE executed its first contract with the Sacramento Municipal Utilities District (SMUD) for Call Center and Data Management Services (CCDMS) in February 2018. The contract was subsequently amended and extended with an effective date of January 1, 2021, for a term of up to two additional years.

Based on feedback received from the Board and the community when the SMUD Master Services Agreement was first amended, and to conform with EBCE's updated technology roadmap, EBCE staff issued a Request for Proposals (RFP) for Call Center and Data Management Services, requesting proposals from all qualified providers with specific emphasis on call center flexibility, cost-effective service delivery, and integration with EBCE's roadmap. The RFP was issued in March 2021 and responses were due April 2021.

EBCE received qualified responses to the RFP from three bidders, including SMUD. Staff reviewed all responses and conducted in-depth interviews with all 3 respondents in May 2021. Staff then scored the proposals based on the written responses and the interviews. Finally, staff conducted follow-up interviews with the top two respondents, as well as reference checks. Staff also met with the CCDMS Ad Hoc Committee on May 17, 2021, to review the process and obtain feedback on the respondents and call center options provided.

Upon review of the responses provided and tabulation of the scores, and consideration of feedback from the Ad Hoc Committee, staff determined that the most prudent course of action would be to proceed with negotiations with SMUD, provided SMUD was willing to negotiate certain concessions related to scope improvements and system enhancements, the pricing schedule, and flexibility on call center options.

Upon receipt of SMUD's favorable written response to these requests, and upon consideration of the potential additional costs and risks associated with transitioning to a new CCDMS provider, staff selected SMUD for final negotiations. These negotiations are now almost complete, and staff is pleased to bring a Resolution to the Board to authorize the CEO to negotiate and execute an amendment to the existing SMUD Master Services Agreement and to Task Order No. 2.

Highlights of the Contract Amendment

Here are some highlights of what the amended SMUD Master Services Agreement and Task Order No. 2 with SMUD would mean to EBCE:

- Term of 36 Months, starting on 1/1/2022 through 12/31/2024;
- Per-Meter Fee reduced to \$1.00/meter/month from a current fee of \$1.05/meter/month - a savings of \$384,000 per year based on 640K meters
- A decreasing fee schedule for additional meters, progressively decreasing from \$0.975/meter/month for meters beyond 700K, down to \$0.90/meter/month for meters beyond the 1 million mark;
- A commitment to provide essential system enhancements for EBCE operations without additional change orders;
- A commitment to execute several in-flight or potential upcoming change orders without charge, such as NEM true-up policy changes, Brilliant 100 sunset, product defaults, and expansion to new communities;

- A further budget for system enhancements of \$100K per year, which can roll-over from year to year while under contract, for changes that are deemed non-essential;
- A credit of \$5K per month per EBCE Call Center Employee, for up to three full-time EBCE employees that EBCE hires, and whose work is managed and scheduled by the SMUD call center;
- If SMUD Customer Service Representatives (CSR) work in an EBCE brick and mortar facility (if EBCE chooses to invest in such a facility), a facilities credit of \$1.5 per square foot per month of space occupied by the SMUD CSRs, up to 250 square feet;
- 100 hours of Local Development Program Support;
- 20 hours per month of Call Center Support for Local Development.

The key terms are summarized in the table below.

Term	Summary
Duration	36 Months, starting on 1/1/2022 through 12/31/2024
Per-Meter Fee	<ul style="list-style-type: none"> • Reduced to \$1.00/meter/month from a current fee of \$1.05/meter/month; • A decreasing fee schedule for additional meters, progressively decreasing from \$0.975/meter/month for meters beyond 700K, down to \$0.90/meter/month for meters beyond the 1 million mark
System Enhancements	<ul style="list-style-type: none"> • All system enhancements that are deemed essential for EBCE operations would be provided by SMUD without additional charge • Budget of \$100K per year, which can roll-over from year to year while under contract, for changes that are deemed non-essential • Agreement to execute several in-flight or potential upcoming change orders without charge, such as NEM true-up policy changes, Brilliant 100 sunset, product defaults, and expansion to new communities
Call Center	<ul style="list-style-type: none"> • A credit of \$5K per month per EBCE Call Center Employee, up to three, for each full-time EBCE employee that EBCE hires, and whose work is managed and scheduled by the SMUD call center; • If SMUD CSRs work in an EBCE's brick and mortar facility, a facilities credit of \$1.50 per square foot per month of space occupied by the SMUD CSRs, up to 250 square feet • 20 hours per month of Call Center Support for Local Development
Local Programs	<ul style="list-style-type: none"> • 100 hours of Local Development Program Support

Fiscal Impact

Here are summary cost numbers for reference, based on staff analysis using the current base of 640K customers:

- **\$8.25M / year** - Current estimated annual cost to EBCE for CCDMS Services from SMUD, including about 10K per month for system enhancements;
- **\$7.75M / year** - New estimated annual cost to EBCE for CCDMS Services from SMUD, reflecting a reduced per meter fee, the inclusion of essential system improvements, and a budget for additional improvements;

As detailed above, the RFP process yielded significant improvements from the existing agreement with the incumbent provider, SMUD. This includes cost savings related to some options for how to hire and manage in-territory call center reps. At a minimum, staff anticipates an annual savings of approximately \$500K per year stemming from the amended SMUD Master Services Agreement and Task Order No. 2.

While it is challenging to do a direct comparison between respondents due to the differences in cost schedules and options, EBCE staff estimates that had it selected the second highest rated respondent rather than SMUD, the annual fees paid to the CCDMS Provider could have been further reduced by about \$500K to \$750K per year, when accounting for most variables, including transition credits as well as early exit penalties stemming from the current SMUD contract.

Staff also believes that selecting SMUD will also allow a continuity of service, which will avoid potential significant additional costs due to transitioning to a different billing provider, potential disruption/billing errors that can commonly occur with such a significant transition, as well as disruptions to customer service related to call center capabilities. At a minimum, staff estimates that EBCE would have incurred an additional one-time cost of \$500K to manage the transition to a new CCDMS provider.

Selecting SMUD will also provide a better experience for our customers when compared to other respondents, including the avoidance of customer service interruptions due to the transition. Finally, staff anticipates being able to capture additional value from the SMUD call center with programs such as the Arrearage Management Program and local Program marketing.

Conclusion

Based on the totality of the RFP responses and interviews, the cost/benefit analysis, and the reference checks, staff determined that the best course of action was to proceed with negotiations with SMUD. It is important to note that the amended agreements with SMUD will provide concrete options and savings opportunities for EBCE to begin transitioning the call center to a more local presence, whether that be through the hiring by SMUD of local call center employees, EBCE adding staff to handle call center responsibilities, or a combination of both, and either at SMUD facilities or EBCE facilities. The amended SMUD Master Services Agreement and Task Order No. 2 will also provide more flexibility for EBCE to pursue its internal systems roadmap, especially as it relates to its Customer Relationship Management System.

Attachments

- A. Resolution Authorizing the Chief Executive Officer to Negotiate and Execute Contract Amendments with Sacramento Municipal Utilities District for Call Center and Data Management Services
- B. Presentation

RESOLUTION NO. __

**A RESOLUTION OF THE BOARD OF DIRECTORS
OF THE EAST BAY COMMUNITY ENERGY AUTHORITY TO AUTHORIZE THE CHIEF
EXECUTIVE OFFICER TO NEGOTIATE AND EXECUTE CONTRACT AMENDMENTS WITH
SACRAMENTO MUNICIPAL UTILITIES DISTRICT FOR CALL CENTER AND DATA
MANAGEMENT SERVICES**

WHEREAS The East Bay Community Energy Authority (“EBCE”) was formed as a community choice aggregation agency (“CCA”) on December 1, 2016, Under the Joint Exercise of Power Act, California Government Code sections 6500 *et seq.*, among the County of Alameda, and the Cities of Albany, Berkeley, Dublin, Emeryville, Fremont, Hayward, Livermore, Piedmont, Oakland, San Leandro, and Union City to study, promote, develop, conduct, operate, and manage energy-related climate change programs in all of the member jurisdictions. The cities of Newark and Pleasanton, located in Alameda County, along with the City of Tracy, located in San Joaquin County, were added as members of EBCE and parties to the JPA in March of 2020.

WHEREAS Call Center and Data Management Services (“CCDMS”) are fundamental to the efficient operation of EBCE as a CCA;

WHEREAS EBCE executed a contract with the Sacramento Municipal Utilities District (“SMUD”) in February 2018 to provide CCDMS, and subsequently extended that contract for a term of up to two years starting on January 1, 2021 (the contract and amendment collectively the “SMUD Master Services Agreement”);

WHEREAS EBCE issued a Request for Proposals for CCDMS in March 2021, received multiple proposals from qualified vendors, and upon careful evaluation selected the proposal from SMUD for further consideration;

WHEREAS the proposal from SMUD includes significant price and cost reductions, along with flexible options for Call Center Services, for an additional term of up to three (3) years;

WHEREAS EBCE now desires to amend the SMUD Master Services Agreement to extend the term of the SMUD Master Services Agreement and make other clarifications, and additionally amend Task Order No. 2 to the SMUD Master Services Agreement to revise the scope of work, extend the term of Task Order No. 2 and revise the amount and terms of compensation.

NOW, THEREFORE, THE BOARD OF DIRECTORS OF THE EAST BAY COMMUNITY ENERGY AUTHORITY DOES HEREBY RESOLVE AS FOLLOWS:

Section 1. The Board hereby authorizes the Chief Executive Officer to enter into negotiations and execute, subject to the approval of General Counsel, an amendment to the SMUD Master Services Agreement and an amendment to Task Order No. 2, for the purposes set forth above, for a term ending on December 31, 2024, and for

compensation in conformance with the terms set forth in the staff report associated with this resolution.

ADOPTED AND APPROVED this 20th day of October, 2021.

Dianne Martinez, Chair

ATTEST:

Adrian Bankhead, Clerk of the Board

OCTOBER 20, 2021

SMUD Contract Amendments

Meeting - EBCE Board of Directors



Background – Call Center and Data Management

- CCAs have historically contracted with 3rd parties for Call Center and Data Management Services (CCDMS)
- In 2017, EBCE selected SMUD as its CCDMS provider, and subsequently executed an agreement in 2018
- That agreement was amended and extended in late 2020 for an additional term of up to 2 years
- Staff then issued a Request for Proposals in April 2021 to solicit CCDMS bids, with the following objectives:
 - Obtain better understanding of price, pricing options, pricing breakdown and competitiveness
 - Obtain options for various Call Center models
 - Lay out the EBCE Systems Roadmap, and assess options based on roadmap fit.

RFP Timeline & Evaluation

- RFP issued March 2021; EBCE received responses from 3 vendors in April 2021
- Staff reviewed and scored through May; met with respondents for follow up interviews
- Staff met with Ad Hoc Committee of the EBCE Board of Directors on May 17; reviewed responses
- Based on scoring, respondent interviews, reference checks and Board Ad Hoc Committee feedback, staff selected the incumbent SMUD in June to begin negotiations for contract extension
- Resolution to Authorize Amendment to SMUD Contracts brought forth today
- Many improvements to agreement, including lower cost, credits related to Call Center & roadmap flexibility

Summary of Key Terms of Contract Amendment

Term	Summary
Duration	36 Months, starting on 1/1/2022 through 12/31/2024
Per-Meter Fee	<ul style="list-style-type: none">• Reduced to \$1.00/meter/month from a current fee of \$1.05/meter/month;• A decreasing fee schedule for additional meters, progressively decreasing from \$0.975/meter/month for meters beyond 700K, down to \$0.90/meter/month for meters beyond the 1 million mark
System Enhancements	<ul style="list-style-type: none">• All system enhancements that are deemed essential for EBCE operations would be provided by SMUD at no additional charge• Budget of \$100K per year, which can roll-over from year to year while under contract, for changes that are deemed non-essential• Agreement to execute several in-flight or potential upcoming change orders without charge, such as NEM true-up policy changes, Brilliant 100 sunset, product defaults, and expansion to new communities
Call Center	<ul style="list-style-type: none">• A credit of \$5K per month per EBCE Call Center Employee, up to three, for each full-time EBCE employee that EBCE hires, and whose work is managed and scheduled by the SMUD call center;• If SMUD CSRs work in an EBCE's brick and mortar facility, a facilities credit of \$1.50 per square foot per month of space occupied by the SMUD CSRs, up to 250 square feet• 20 hours per month of Call Center Support for Local Development
Local Programs	<ul style="list-style-type: none">• 100 hours of Local Development Program Support

- **\$8.25M / year** - Current estimated annual cost to EBCE for CCDMS Services from SMUD, including about 10K per month for system enhancements
- **\$7.75M / year** - New estimated annual cost to EBCE for CCDMS Services from SMUD, reflecting a reduced per meter fee, the inclusion of essential system improvements, and a budget for additional improvements
- SMUD was not the lowest cost option; Staff estimates that switching to another provider could have yielded an additional fee reduction of \$500K to \$750K per year
- On the other hand, Staff also estimates that switching to an alternate provider would result in additional one-time costs to EBCE on the order of \$500K (including EBCE staff time, service disruptions, customer satisfaction impacts)
- Staff believes incumbent provides a higher level of customer service and satisfaction that justifies the price premium

- SMUD call center staff currently all working remotely.
- In 2022, SMUD will commence proactive efforts to hire customer service representatives (CSR) from within EBCE service territory
- At this time, it is difficult to determine the timing of a brick-and-mortar call center within our service territory given COVID-19 risks and SMUD's current remote work policy.
- Once SMUD establishes a return-to-work policy with their unionized SMUD CSRs, EBCE will engage with SMUD to further evaluate and design a local brick-and-mortar call center.

Call Center Credits

*For SMUD CSRs working in an EBCE brick and mortar facility, a facilities credit of **\$1.50 per square foot per month of space occupied by the SMUD CSRs, up to 250 square feet***

\$5K per month per EBCE Call Center Employee, up to three, for each full-time EBCE employee that EBCE hires, and whose work is managed and scheduled by the SMUD call center