

Attachment D

Description of EBCE Data and Analytics Tools and Data Sources

EBCE's Data and Analytics team manages EBCE's data landscape and provides tools to support accessing and utilizing the existing data sources. Below is a description of EBCE's tools and systems and EBCE's existing data streams. Bidders are to consider these capabilities and proposed usage of the capabilities thoughtfully in their proposals. Access to EBCE customer data is subject to execution of a non-disclosure agreement and confirmation that Bidder is qualified to use and house data consistent with the requirements of CPUC policies¹.

Existing Tools

Tool	Purpose
Google Cloud Storage	Cloud-based system to support access to and management of EBCE's data sources. Preferred tool for transfer of non-program reporting data.
Google BigQuery	Cloud-based data warehouse used to store and report on all EBCE data managed by the Data and Analytics team. BigQuery is a repository for all relevant data including customer characteristics, enrollment, usage, billing, and third-party data. EBCE can and has in the past set up projects and service accounts within Google BigQuery for sharing restricted data with other users of the Google Cloud Platform. Bidders familiar with Google BigQuery and the Google Cloud Platform in general should address this in their response.
Salesforce ECRM	EBCE's customer relationship management tool. Populated with data on all customers, including billing and usage summaries, customer property information, and relevant third-party data sources. Primarily sources from BigQuery. Equipped with multiple applications to facilitate program implementation (supported via the PowerPath application), including customer intake, lead management, fund reservation, and project reporting. Bidders may be given limited, controlled access to EBCE's CRM via the development of a partner portal.

¹ [1] See <https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M026/K531/26531585.PDF>

Data Sources

Below is a non-exhaustive list of relevant data sets.

Data Type	Data Sources	Notes
Core Customer Characteristics	PG&E 4013 Additional Data	The PG&E 4013 extract contains core customer characteristics such as identifiers, rates, enrollment, participation in certain PG&E programs (CARE, FERA), etc. This is augmented with EBCE enrollment information such as enrollment dates, programs, products, etc.
Additional Customer Characteristics	Tax Assessor Data Additional Demographics	EBCE obtains and matches publicly available tax assessor data (Tracy excluded) along with purchasing and matching social demographics with household information (70% match rate) from a variety of sources.
Census and Service Territory Level Information	Census Publicly Available Data Sources	EBCE obtains census level information such as census records, CalEnviroScreen and other data sources and maps those to EBCE customers based on census maps.
Energy Consumption and Billing Data	PG&E Item 16, 17 Billing Determinants Invoice Details	Billing and Consumption information for customers. Electricity data available at monthly, bill-cycle, hourly and 15-minute intervals (depending on customer type and availability – about 97% of customers have interval data; residential is hourly, non-residential is 15-minute); gas data available monthly and daily. Gas data may have gaps.
Transportation Related Data	DMV Data and EV Vehicle Ownership	EBCE obtains and matches DMV data to customer records including data on vehicle make and model and fuel type. EBCE also pull information on charging stations.
Energy Market Data	CAISO data (DAM, RTM, RTPD / FMM)	EBCE pulls information from the CAISO OASIS system and other sources. Nodal price information available.