

As of 2/23/16

RFP EM-007-2016
Questions and Answers Regarding
Request for Proposals for Consumer Products Program

Below are answers to the questions the Trust has received regarding this RFP:

- 1) **Q:** Is this program currently managed in-house or run by CLEAResult?

A: This program is currently managed by the Trust and implemented by CLEAResult, which provides substantive input on program design; manages retailer and distributor relations and the field team; manages data collection, analysis, and reporting; oversees rebate processing; handles technical calls from customers; and other related tasks as described in the scope of work for this RFP.

- 2) **Q:** Will Efficiency Maine Trust be willing to consider bidders that submit proposals for the CFLs to food banks part of the RFP?

A: No. The Trust is looking for a single prime contractor to perform the Primary Program Tasks enumerated in section 3.2 of the RFP, with the noted exception that marketing tasks may be called for on an “as needed and available” basis. (The Trust will issue a separate Request for Qualifications for various communications services, which would support marketing and outreach for this program.) Companies interested in only a portion of the scope of work are welcome to bid as members of a team that can perform the entire scope of work.

- 3) **Q:** How much of the program budget will be available for a third party, assuming some of the budget provided in the RFP covers Efficiency Maine Trust’s staff? Can you please provide a breakdown indicating which staff you employ internally at Efficiency Maine and who is third party for delivery of the Consumer Products Program?

A: The approximately \$12 million/year budget mentioned in the RFP is the proposed budget for incentives, delivery, marketing, and management activities by the delivery team. The actual budget will depend on Public Utilities Commission and Board of Trustee action. The current team of 8 field reps, 3 in-house program coordinators, and 1 in-house program manager mentioned in the RFP are all employees of the current delivery team, CLEAResult. The Trust anticipates setting aside approximately \$250,000 of the total budget for a third-party marketing provider outside of this statement of work.

- 4) **Q:** Is Efficiency Maine open to new program approaches that would cause an interruption in the legacy approach while the new program is setup and launched?

A: Yes. The Trust would prefer to minimize disruption, but if there is a way to drive increased verifiable, cost-effective energy efficiency and customer satisfaction with a new approach, the Trust would be open to it.

5) **Q:** Who is the incumbent for this work?

A: CLEAResult.

6) **Q:** Is the budget considered final, or will there be credit given for identifying efficiencies in program delivery that can result in budgetary savings?

A: Both. We are looking for a delivery team that can maximize the verifiable, cost-effective energy savings while investing the entire budget.

7) **Q:** The RFP (p. 9) lists Marketing tasks "if required." Can the Efficiency Maine Trust specify which marketing tasks its communications team will be undertaking, and which the contractor will perform? Are the Marketing tasks listed on page 9 labeled "if required" because the Efficiency Maine team will do those, or because the team does not believe the project needs a marketing plan and marketing materials?

A: The Trust plans to issue a separate Request for Qualifications (RFQ) for communications support, including marketing and design services. A combination of Trust staff and services contracted through the Communications RFQ will be used to provide marketing and outreach for the Consumer Products Program. That said, the Trust recognizes that elements marketing are integral to the performance of the Field Support and In-bound Customer Support tasks. The Trust also expects there will be situations where the Consumer Products Program delivery team would be well-positioned to advance the program objectives by providing supplemental marketing services. The Trust is interested in the marketing qualifications and rates of bidders in case such support is needed. We also used the term "if required" to make clear that marketing may not be necessary if the savings goal can be achieved without marketing.

8) **Q:** The RFP (p. 11) indicates that the contractor will work cooperatively with both the Trust's Communications Division and its marketing contractors. Can you please provide more information about how many marketing contractors the Trust currently has, and the roles they play?

A: The Trust plans to issue a separate Request for Qualifications for communications and design services, which would support marketing and outreach for all programs. Bidders who are interested in providing these services should sign up to receive notices of new opportunities at <http://www.energymaine.com/about/contact/>.

9) **Q:** Does the Efficiency Maine Trust anticipate using the same measure mix in 2016, 2017, and 2018?

A: Not necessarily. As technology and baselines change, so too will measure mix. For example, the Trust would anticipate more LEDs and fewer CFLs. However, the Trust is generally open to whatever mix will achieve its savings goals.

10) **Q:** Is the Efficiency Maine Trust open to modifying the measure mix?

A: Yes.

11) **Q:** Will the selected contractor be given a “warm introduction” to current market/store contacts during the cutover period?

A: The Trust will make every reasonable effort to facilitate a smooth transition including introductions to current market/store contacts.

12) **Q:** Does the Efficiency Maine Trust plan to require account number verification in the new program cycle?

A: No. At this time, the Trust does not foresee requiring account number verification for this Program.