EM-007-2018 Technical Services to Develop a Spreadsheet Tool

Question 1:
In the RFP it states that a Microsoft Excel platform is to be used for the lighting assessment tool. Is Efficiency Maine open to web-based and iPad-based (without an internet connection) options that can integrate with Excel/Salesforce and other platforms? The option noted above would address all requirements and specifications of section 3.1.

Answer:
Excel is the preferred platform because it provides a standard format that can be easily ported and maintained by Efficiency Maine staff. Other options would be considered if they offered the same portability and easy of maintenance without requiring ongoing contractor support or specialized software or license.

Question 2:
We are aware that Attachment A-Proposal Cover Sheet needs a wet signature by an authorized person, can you please confirm if you require an additional wet signature on one proposal.

Answer:
The Trust considers “original” to be a “wet” signature (i.e., a signature using a pen). One signed original copy is required. A scan or facsimile of a signed original document would have the same legal force as a paper proposal with a handwritten signature. Attachment A should be included with each copy of the proposal.

Question 3:
Please provide the document "Lighting Savings and Cost-Benefit Analysis Calculation Example.xlsm" if this is different from "efficinecy-maine_rfp_2018_technical_assistance_lighting-tool_attachement_d.xlsx". The link in the table section 2.3 to this document does not appear to work.

Answer:
Attachment D posted with the RFP is the example.

Question 4:
Will Project Materials and Labor costs be supplied/entered by the Qualified Partners or will standard assumptions be included in the tool across Qualified Partners?

Answer:
The tool should have the flexibility of being configured to accept user-defined values or deemed values as determined by Efficiency Maine.

Question 5:
Can you please provide an example of the .CSV Upload Template referenced in section 3.1.

Answer:
Appendix E is the .csv template for the upload file. Appendix F contains the data definitions for the upload file. Example program-specific definitions are provided for the Small Business Direct Install program. The definitions for the C&I Prescriptive program will be very similar.

Question 6:
What level of support will be expected after the initial delivery of the tool and for what period? Will ongoing changes to the tool be included in the scope? Should the contractor's proposal include budget to account for ongoing maintenance of the lighting tool (e.g., due to TRM changes)? If so, can this be proposed on a T&M basis, or do the hours have to be estimated within the not-to-exceed price?

Answer:
The tool should be designed in such a way that Efficiency Maine staff can maintain and configure the tool after initial delivery. That said, follow-on support and maintenance through December 2018 should be included in the response to this RFP. TRM updates occur quarterly and could impact the savings and cost assumptions used in the tool and the list of eligible measures.
Follow-on support beyond December 2018, if any, would be through a separate task and not included in the scope of this RFP.

Question 7:
How many staff members and others will be included in the training program?
Are there any planned meetings during the contract period (coincident with the beta testing period of the tool) when QPs are either required or invited to attend during which training session(s) could be offered in person?

Answer:
There are two groups of trainees: maintainers and users/trainers. Efficiency Maine anticipates that there will be no more than 4 maintainer trainees. For the users, a train-the-trainers approach is preferred where 3 to 5 trainees will become trainers for the wider user population.

Question 8:
What version of Excel is required for the solution?

Answer:
The Trust is currently using Excel 2016. The tool should be compatible with Excel 2007 through Excel 2016.

Question 9:
What date does Efficiency Maine plan to roll out this tool to Qualified Partners?

Answer:
The tool should be ready for Beta testing no later than June 1, 2018 for a July 1, 2018 go-live date.

Question 10:
Is the tool expected to make recommendations for proposed lighting measures or should these be open fields where the Qualified Partner makes recommendations as he/she sees fit?

1. If it is the latter, is the tool expected to QC the Qualified Partner's recommendations?
2. Will the tool only allow for recommendations that are eligible for incentives?

Answer:
The Trust anticipates that the tool will help the Qualified Partners make decisions on proposed lighting measures based on the cost effectiveness of the options selected. The tool should be designed to prevent ineligible proposed/baseline combinations from being included in the project scope and the calculation of incentives. Providing recommendations to the Qualified Partners to increase the cost effectiveness of the project would be desirable but is not required.

Question 11:
Does Efficiency Maine Trust have a budget in mind for this project?
Can Efficiency Maine please provide guidance regarding the available budget for this work?

Answer:
A specific budget has not been defined.

Question 12:
Should the contractor's proposal include budget to review/verify accuracy of Technical Reference Manual (TRM) savings algorithms/assumptions (e.g., there appears to be an error in the "Prescriptive Lighting: Lighting Fixtures with Integrated Controls – Interior Spaces (New Construction), Code S71 (Inactive)" measure savings algorithm: Demand (kW) savings = LPD_{BASE} x $Watts_{BASE}$ (Watts should be Area)

Answer:
No.

Question 13:
Does the lighting tool need to account for the following?

a. Interactive effects between measures (e.g. reduced fixture savings if occupancy sensors installed)
b. Future codes and standard changes
c. O&M costs
d. Savings/costs based on retrofits as well as new installations (for new construction)

Answer:
The lighting tool needs to be able to calculate the total project savings accurately for the total proposed scope including fixtures, lamps and sensors compared to the existing baseline. Savings and cost assumptions as defined in the TRM will be used in the Tool. The Tool is intended to facilitate retrofit lighting projects and therefore start with the existing baseline in place. Support of new installations is not a requirement.

Question 14:
The RFP requests that an electronic copy be provided on CD-ROM. Is it acceptable to send the electronic copy via email or on a USB drive?

Answer:
A USB drive or email would be acceptable. Note that emailing proposals is subject to potential maximum file size limits and filtering. Electronic files are subject to the same submittal deadline as the hardcopies.

Question 15:
Does Efficiency Maine expect that the tool would be designed to document baseline conditions throughout an entire facility in every case (regardless of the scope of the retrofit project opportunity) or document the baseline conditions only in the area(s) of a facility where the retrofit project opportunity exists?

Answer:
For the purpose of defining the retrofit lighting project, only those areas to be retrofitted are required to be included.

Question 16:
As it relates to the “Mapping between” bullets on page 6 of the RFP, presumably “Mapping between existing lighting fixtures and appropriate replacement fixtures” implies a 1-to-1 relationship within the tool, correct? On the other hand, “Mapping between the controls and the fixtures they control” is a 1-to-many relationship. Is Efficiency Maine interested in trying to capture detail on *all* the fixtures that a proposed control system operates or is it

preferable/sufficient to capture the controlled load and prior usage characteristics for the fixtures operated by the proposed control?

Answer:
1-for-1 replacement is NOT assumed by Efficiency Maine. In order to calculate savings correctly at the measure level, it is necessary to know all of the fixtures in the baseline being replaced with a proposed fixture whether 1-for-1 or many-to-1 or many-to-many. For projects that include controls, the savings associated with the fixture plus control proposal must be calculated properly against the baseline. The savings allocated to the proposed fixtures should reflect the reduced connected load and the baseline use. Saving allocated to controls should only capture the incremental savings attributable to the control measured against the proposed connected load.

Question 17:
Whose perspective should be used when assessing the cost effectiveness of a project through the program – Efficiency Maine's? The customer's? Both?

Answer:
As shown in the example calculation file, cost-effectiveness is based on the total resource cost test.

Question 18:
Understanding that Efficiency Maine will provide all assumptions and supporting data, should bidders assume that product definitions in the tool would be limited to the fixture and control descriptions that are listed in the Commercial/Industrial and Multifamily Technical Reference Manual (Appendix D; Table 31) (e.g.: "LED Outdoor Parking Fixture: 100W-250W")?

Answer:
The TRM is a living document, subject to change quarterly. The list in Appendix D should be considered a starting point. The tool should allow Efficiency Maine staff to update assumptions and data without the need for contractor support.

Question 19:
Alternatively, is Efficiency Maine seeking to track proposed replacement equipment by manufacturer model number (and product description) in the tool?

Answer:
Efficiency Maine desires a tool that is easy for staff to maintain and easy for QPs to use.

Question 20:
What criteria or list(s) are used to identify qualified products for the program?

Answer:
Product eligibility is not a desired function of the tool.

Question 21:
Does Efficiency Maine envision that the customer facing reports (e.g., “written customer statements of work” and “customer project acceptance reports”) could be customized by the QPs in the program?

Answer:
The customer-facing reports must have consistent format and content across all projects. Customization for a contractor to add their company name, logo, contact information, etc. is not a requirement.

Question 22:
The Efficiency Maine website lists approximately 430 Lighting Solution QPs that have physical addresses within the state of Maine. These QPs consist of both installers and electrical suppliers. How many of these QPs are active participants in the program? Or stated another way, how many QPs are responsible for approximately 80% of the program activity (by project or savings)?

Answer:
This data is not relevant to the scope of this effort.

Question 23:
Does Efficiency Maine have a preference between the project being bid as a “Time and Materials with a Not-to-Exceed maximum” or “Fixed Cost” contract?

Answer:
No

Question 24:
Is the current implementation contractor for the C&I Prescriptive Program allowed to bid on this RFP?

Answer:
The current implementation contractor is not prohibited from bidding on this RFP.

Question 25:
Section 1.3 Schedule of Activities seems to have some errors and references 2017 instead of 2018. Could you confirm that the dates are intended to be 2018 dates?

Answer:
All dates listed in Section 1.3 were intended to be in 2018. The RFP was issued January 31, 2018.