

Efficiency Maine RFP EM-010-2019

DELIVERY SERVICES FOR THE SMALL BUSINESS INITIATIVE (SBI)

Bidders Informational Webinar

February 20, 2019



Housekeeping

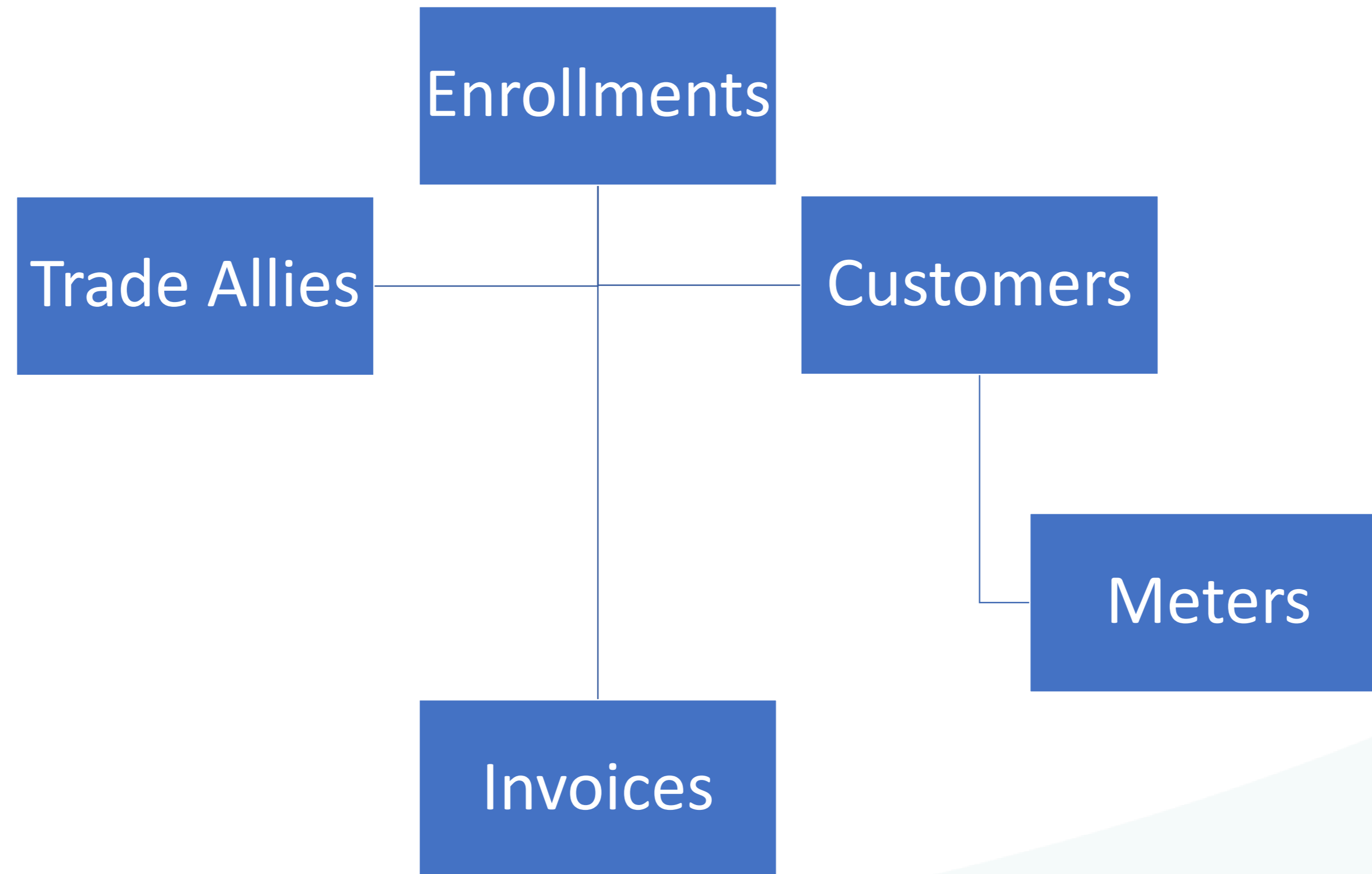
- This is an informational webinar – there will not be an opportunity for Q & A.
- The slides in this webinar will be on the Efficiency Maine website where the RFP EM-009-2019 documents have been posted.
<https://www.energymaine.com/opportunities/rfp-em-009-2019/>
- All phone lines have been muted to eliminate potential background noise.
- This webinar is not being recorded.

Efficiency Maine Reporting and Tracking Database (effRT)

Background For Bidder's Conference

- Database for all projects that have been submitted under the Small Business Initiative
- Applications uploaded by delivery team
- Automated workflow with email notifications
 - Terms and Conditions Acknowledgment
 - Missing Information, Project Acceptance, Pre-Approval

effRT Data Tables



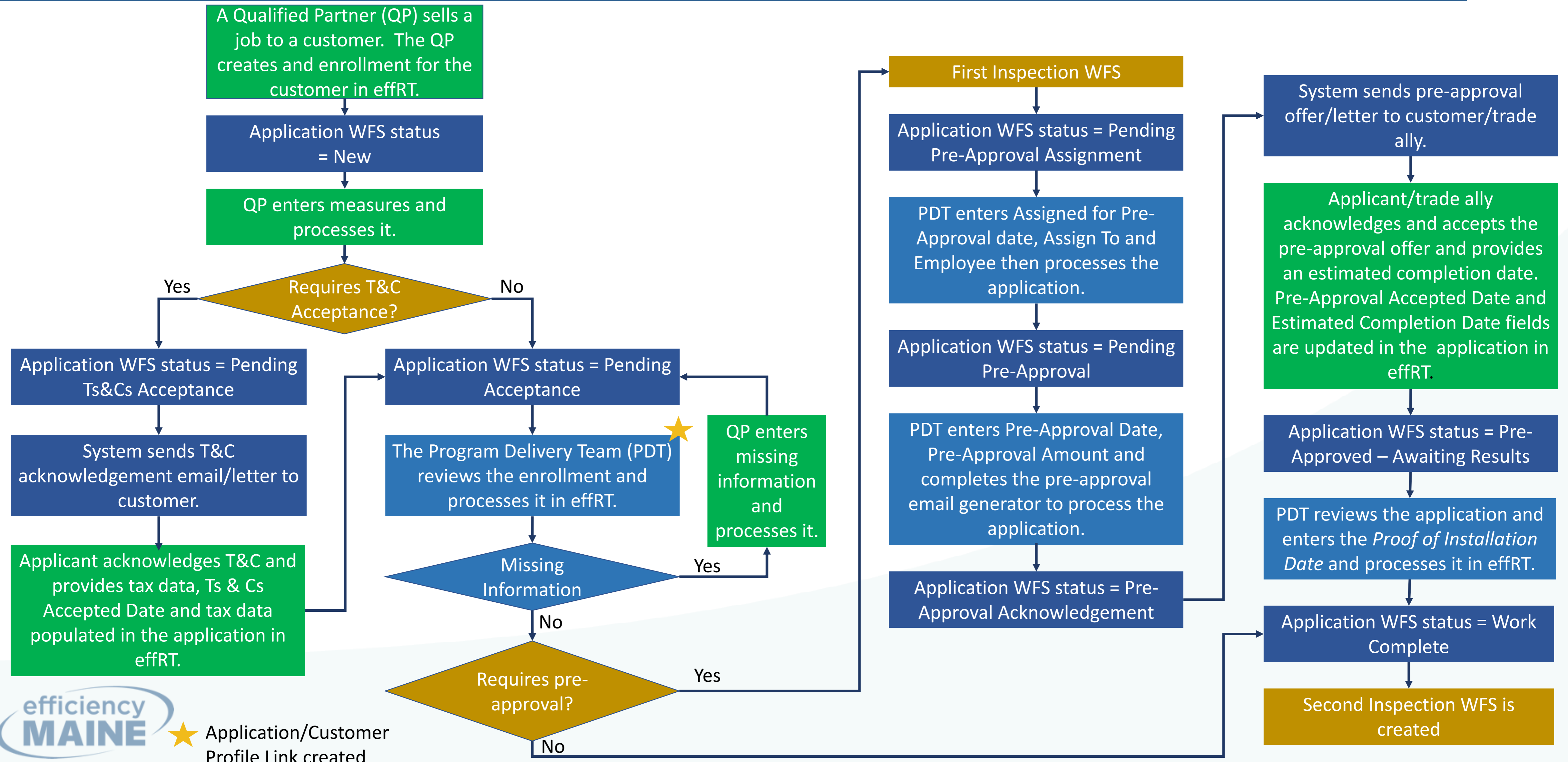
effRT Workflow Steps



Enrollment Upload – New Application

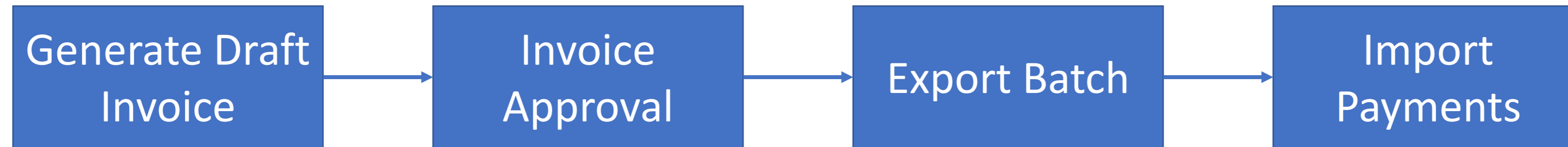
- Applicant information and measures uploaded through csv file
- Proper file format automatically generated from CLIC and SLIC tools
- Data validation occurs upon upload, errors will prevent enrollment creation
- Processing begins at Process New Application

effRT Workflow – Application Creation through Inspection



★ Application/Customer Profile Link created

effRT Invoicing



Batch Invoice

Full Name	Company Name	Street	City	State	Postal Code	Accounting Code	Application Number	Customer #	Incentive \$	Date	Client Code
Joe Smith	WeRU, Inc	PO Box 123	Portland	ME	04104	72	M723623	CUST0125196	36000	01/25/2019	CIPE
Jane Williams	Awesome Bill's	PO Box 2	Kennebunk	ME	04043	72	M735949	CUST0125196	3950	01/25/2019	CIPE
Jim Bow	Jim Bow	12 Anywhere ST	Presque Isle	ME	04769	72	M761257	CUST0125196	21135	01/25/2019	CIPE
Janice Janes	Jan's Flowers, LLC	1 Someplace RD	Wells	ME	04090	72	M761976	CUST0125196	10390	01/25/2019	CIPE

Payment File

Check Number	Invoice Number	Check Date	Enrollment Number	Name	Amount Paid
123456	CUST0125196	1/25/2019	723623	WeRU, Inc	36000
123457	CUST0125196	1/25/2019	735949	Awesome Bill's	3950
123458	CUST0125196	1/25/2019	761257	Jim Bow	21135
123459	CUST0125196	1/25/2019	761976	Jan's Flowers, LLC	10390

Excel Support Tools

- SLIC – Small Business Lighting Investment Calculator
 - Used to define retrofit lighting projects
 - Automatically generates effRT upload file
 - Projects uploaded as “New” and processed automatically to next workflow step status

Distributor Lighting Invoice Template

- Excel based file
- Provides a common format for distributors to record and report midstream measures
- Each transaction is a single entry
- Bulb type and Manufacturer Model # selected from pull down menu
- File pre-configured with program qualifying lamps

Manufacturer/Model #	Watts	Lumens	Hours	Lamp Type	Long Lamp Type	Distributor Cost	Baseline Watts	Rebate	Distributor	effRT Measure C
----------------------	-------	--------	-------	-----------	----------------	------------------	----------------	--------	-------------	-----------------

- Generates check batch file

Full Name	Company Name	Street	City	State	Postal Code	Accounting Code	Application Number	Customer #	Incentive \$	Date	Client Code
0	0	0	0	0	0	72		0	\$-	0	DSIL

- Generates effRT upload file – “Work Complete” enrollments

Small-Business Lighting Investment Calculator (SLIC)

Background For Bidder's Conference

SLIC

- SLIC is an Excel tool used to scope lighting retrofit projects
- Collects project specific data:
 - Customer and facility information
 - Baseline conditions and scope of the upgrade
- Configured with Technical Reference Manual savings assumptions and formulas
- Configured with material and labor costs for prescriptive projects
- Populates measure specific material and labor costs entry
- Calculates project specific cost, savings, cost-effectiveness and incentive of each measure
- Presents project financials
- Generates forms: Statement of work, Bill of Materials, Customer Project Acceptance
- Generates effRT upload file

Live Demonstration