As of 4/4/16

**RFP EM-009-2016**

**Questions and Answers Regarding**
**Request for Proposals for Home Energy Savings Program Delivery**

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

1) **Q:** The RFP stipulates that the chosen vendor must "***maintain*** and use the Trust's HESP database for screening and tracking participants and processing claims". Is it EMT's intention that the vendor should abandon their own IT system utilized for this purpose and use this database exclusively?

   **A:** The HESP database has been developed and adapted over the past 3 years to include screening of program participants since 2010, program rule changes, and formatted uploads for updating online tools and the organizational wide-database. The Trust intends to continue tracking participation and measure level data in a database owned by the Trust, and not pay for development or adaptation of any other database that the Trust cannot own. The winning bidder will need to maintain the database over time, incorporate rule and rebate changes as they occur, and use the reporting functionality as needed to meet the Trust's objectives.

2) **Q:** Does EMT envision that this database will be used in conjunction with the vendor's own IT system?

   A: The Trust does not prohibit use of other software to augment work with the HESP database, but the core functions of project processing, tracking, and reporting are expected to be substantially incorporated into the HESP database. Relevant data must also be uploaded regularly to the Trust's other existing program tracking "EffRT" database (as mentioned in the RFP).

3) **Q:** How will the HESP database be made available?

   **A:** The HESP database can be housed at Efficiency Maine's facilities and accessed online by delivery team members or can be configured and housed on a dedicated secure server at the winning bidder's facility to improve speed and access regardless of internet connectivity.

4) **Q:** Are we required to integrate in real-time to confirm/populate the customer account information for rebate requests?

   **A:** Real-time confirmation of eligibility on the basis of prior participation is required for rebate processing and a key function of the current database. Verification of utility account numbers provided by customers is not required at this time.

5) **Q:** Is there any other information in the Access 2000 database other than account data that we will require to process the rebates?

   **A:** The database entry module incorporates information on prior participation and compliance with rules around dates and project completion.

6) **Q:** Do we need to integrate into the Access database the ability to transmit in-progress and/or completed rebate data, or will we simply output a regular report from the system to import into your database?

   **A:** A monthly report is generated for direct upload into the Trust's EffRT database. Near daily updates of summary program activity and measure level data in Excel spreadsheets are uploaded to a secure file server for direct access by the HESP Program Manager.

7) **Q:** Please elaborate as to the extent of technical guidance being requested in regards to renewable energy technical support. Does EMT anticipate this to be a function of the call center in which a CSR can provide the necessary guidance via a script or does EMT expect the delivery agent to provide engineering level guidance to contractors and customers interested in renewable measures?

   **A:** Technical questions that exceed what is available on our website will be forwarded to a technical field team member who has renewable energy training and expertise. The delivery team field representatives need to have understanding of renewable energy technologies equivalent to NABCEP Energy-Level Certificate of Knowledge training, for purposes of answering questions to consumers and verifying during inspections that generally accepted industry practices are employed in installations supported by the Trust's loan and rebate programs. The Trust does not expect the delivery team to provide engineering-level guidance to callers or homeowners, but should be aware of current technology, options, configurations, and appropriate applications.

8) **Q:** For the rebate processing, can you provide a breakdown of the approximate volume of claim forms received via mail, fax and email per month?

   **A:** In the past year the number of rebate claim forms received in any given month has varied from 600 to 1,200. The majority are received via email with an approximate breakout of 60% email, 30% standard mail, and 10% via fax.

9) **Q:** Does the Trust expect final proposals on Wednesday, April 20 or Friday, April 22.

   **A:** Proposals are due at Efficiency Maine offices by 3:00 PM Eastern Time, on Friday, April 22, 2016. All received proposals will be date stamped on arrival. Proposals that are received after the deadline will not be considered.