



**EFFICIENCY MAINE TRUST
REQUEST FOR QUALIFICATIONS FOR TECHNICIAN SERVICES:
DISTRIBUTED GENERATION METERING INSTALLATION,
CONFIGURATION AND SUPPORT
RFQ EM-001-2015**

**Date Issued:
July 3, 2014**

Closing Date: July 24, 2014, 3:00pm

1. **NAME** RFQ EM-XXX-2014 Request for Qualifications for Distributed Generation Metering Installation, Configuration and Support. Efficiency Maine Trust is soliciting technician services from qualified firms or individuals to provide technical services to the Trust in support of its distributed generation projects located throughout the State.
2. **Contact Person** Laura Martel, Research and Data Analyst, Efficiency Maine Trust, 151 Capitol Street, Suite 1, Augusta, Maine 04330 Telephone 207 213 4143.
3. **Submission Requirements** Four (4) copies of the Qualification package must be clearly marked: "Qualifications for Distributed Generation Metering Installation, Configuration and Support" addressed to the contact person above.
4. **Proposal Schedule**

Event	Date/Deadline
RFQ Issued	<u>July 3, 2014</u>
Questions Due	<u>July 15, 2014 (new date)</u>
Responses to Questions Posted	<u>July 18, 2014 (new date)</u>
Submissions Due at Efficiency Maine Trust office	<u>July 24, 2014, 3:00pm local time</u>
Anticipated Award Date	<u>July 31, 2014</u>
Anticipated Contractor Start	<u>August 14, 2014</u>

Submittals delivered after the deadline will not be considered. All questions shall be directed in writing to the above office (email: laura.martel@efficiencymaine.com). All questions will be posted on the Trust's website here <http://www.efficiencymaine.com/opportunities>.

5. **Background**

The Trust is responsible for developing and administering a wide range of programs to promote increased use of energy efficiency and renewable energy throughout Maine. Included in the Trust's portfolio of programs are installed distributed generation resources. Monitoring the output of the distributed generation resources is critical to measure achieved energy generation as well as monitor system performance. Efficiency Maine would like to improve the process of collecting generation data from its distributed generation projects in order to enhance reporting that is based on this data.

The Trust's program tracking database (effRT) is administered through a third party vendor. It is expected that the selected contractor will work closely with the Trust's database administrator. The Trust is seeking individuals or firms to install metering equipment capable of providing automatic, remote reporting of generator performance through the use of sub-meters, data acquisition servers and cellular modems. Generation data will be sent to the Trust for upload into the Efficiency Maine Trust program tracking database – effRT.

Current distributed generation resources are installed in the following locations:

Moose River, ME

Dixfield, ME

Bar Harbor, ME

Portland, ME

Lewiston, ME

Scarborough, ME

The selected contractor will be responsible for installing metering equipment on all existing distributed generation resources.

6. Qualifications

Proposed personnel should have experience in the installation, configuration and servicing of metering equipment and experience with electrical generation equipment. Firms or individuals should have sufficient staff and resource capabilities within the firm or team identified in the bid to support Efficiency Maine in a timely fashion, without further sub-contracting. Individuals or firms should have the capability to respond to requests for services from the Trust on very little notice and with quick turnaround times required. Firms or individuals must hold proper licenses, insurance and bonds to perform the required services in the state of Maine.

7. Services

Selected contractor will provide the following services.

- a. **Data Protocol Coordination:** Coordinate with the Trust's database administrator on data format and transfer to support upload into effRT.
- b. **Cellular Modem Selection:** Select appropriate cellular modem and cellular data service to provide internet connection between the Data Acquisition Server (DAS) and the Trust's database administrator.

- c. **Metering Solution Selection:** Physically inspect customer generators and determine the appropriate metering solution for each generator from the following.
 - i. **All-in-One Unit** (AcquiSuite A8814 or equivalent): Sub-meter and Data Acquisition Server (DAS) integrated into a single installable unit.
 - ii. **Separate Units** (Leviton 3300 sub-meter and A8812 or equivalent): Sub-meter and DAS in two units that can be installed independently.
 - iii. **Data Acquisition Server Only** (To be specified by contractor): Single DAS that interfaces with existing sub-meter.
- d. **Installation:** Installation of selected metering solutions and cellular modem on customer premises with minimal disruption to customer, on-site personnel, generator, ancillary equipment, wiring and facility. To minimize disruption and travel expense, to the greatest extent possible, the generator inspection and metering equipment installation should be conducted during a single site visit.
- e. **Configuration:** Properly configure the sub-meter, DAS and cellular modem to meet the following requirements:
 - i. Method of file transfer: HTTP/Post
 - ii. Logging period: 15 minutes and one hour increments
 - iii. Frequency of file transfer: daily
 - iv. File Format: .csv
 - v. Driver configuration: default (if customization is required, file format differences need to be identified and coordinated with the Trust's database administrator)
 - vi. Customer field: as specified by the Trust's database administrator
 - vii. Target address for upload: as specified by the Trust's database administrator
 - viii. Alarms: direct email. Email address to be specified by the Trust's database administrator
 - ix. MODBUS connected devices: to be coordinated between contractor and the Trust's database administrator
 - x. Build Manager Online (BMO) (optional): all DAS must link to same BMO, "allow remote configuration" must be selected.
- f. **Configuration Documentation:** Record and provide the following data to the Trust and the Trust's database administrator for each installation.

- i. Upload password
 - ii. Serial number
 - iii. Modbus loop name
 - iv. Device name
 - v. If other meters are connected to the device:
 1. MODBUS device number
 2. Data point index (provided as upload file)
 - g. **Support:** Provide on-going support for 1 year to address configuration issues, installation issues and equipment failures.
8. **Billing** Invoices submitted for work performed shall be sufficiently specific to allow evaluation of charges billed in light of the tasks required by this RFQ, including a breakdown indicating person(s) who performed work, date, nature, and duration of work and rate.
9. **Reservation of Rights** Efficiency Maine reserves the right to reject any and all submissions.
10. **RFQ Response Required Information (page limits are a maximum)**
 - a. **Proposal Cover Sheet Form:** Provide a completed, signed Proposal Cover Sheet Form, which is provided in Attachment A to this RFQ.
 - b. **Letter of Transmittal:** Provide a brief letter summarizing qualifications and project understanding. (one page)
 - c. **Company Profile:** Provide an overview of the company including location, number of staff, licenses, insurance, bonds and certifications. Describe the services the firm provides. (one page)
 - d. **Individual Experience/Qualifications:** Identify the proposed personnel and their qualifications and capabilities to provide services identified in section 7 of this RFQ. (one page per person)
 - e. **Management Approach:** Describe processes to ensure that assigned task orders will be completed on time, on budget, and with high quality and accuracy. (one page)
 - f. **Hourly Rates and Expenses:** Provide hourly rates and costs for all personnel, including any subcontractors and other direct costs. All related expenses must be included and itemized. A copy of the budget must be provided in Microsoft Excel format along with the response.

- g. References:** Provide names, addresses, email addresses, and telephone numbers of representatives of five current or recent clients for whom the firm has provided services related to those in this RFQ.
- h. Additional Data:** Provide any additional data you consider essential to the submittal recognizing that the Trust appreciates and prefers succinct proposals.

11. Evaluation The selection team will use the following criteria when reviewing and ranking submittals:

- a. Qualifications and expertise of the firm and relevant experience of proposed personnel;
- b. Availability of team personnel and ability to respond to task orders and complete assigned work efficiently to meet project schedule and;
- c. Rates

The Trust may at its discretion interview potential candidates or request additional information from select candidates.

12. Contract Award

Efficiency Maine Trust will notify all bidders of the contract award decision by email. The anticipated award date is specified in Section 4. The Trust reserves the right to negotiate the final terms and conditions of the contract award with a winning bidder whose proposal is selected by the Trust, and to reject any winning bidder with whom the Trust cannot agree to terms and conditions meeting the Trust's needs, in the Trust's sole judgment.

13. Contract Term and Compensation

The duration of the contract resulting from this RFQ shall be for one (1) year from the date of its execution. The Trust reserves the right to negotiate an additional one (1) year renewal with the selected contractor. The proposal should be bid as a time-and-materials, "not-to-exceed" type contract.

14. Contract Form

Included with the RFQ is a copy of Efficiency Maine Trust's standard contract form (Attachment B). This contract form will be used to complete the agreement for services between the selected contractor and Efficiency Maine.

15. Contractor Responsibilities

The contractor will be responsible for adhering to the following requirements:

- a. Confidentiality.** The selected contractor will be required to adhere to the confidentiality requirements specified in the Standard Agreement, Rider B, Section 23, Confidentiality. The contractor and each of its subcontractors, if any, will be required to sign a nondisclosure agreement before any customer data is released to the contractor.
- b. Project Personnel.** In accordance with Standard Agreement, Rider B, Section 3, Provider Personnel, no re-deployment or replacement of any Key Personnel may be made without prior written consent of the Trust.
- c. Safety.** The consultant will be responsible for adhering to safety protocols and providing all necessary safety gear for any site visits and on-site data collection, as appropriate.

16. Indemnification and Insurance

The successful contractor selected shall agree to indemnify and hold the Trust harmless from claims, demands, suits, causes of action and judgments arising from the Contractor's performance, including claims of professional malpractice or negligence.

17. Request for Reconsideration

An aggrieved person may request reconsideration of a contract award decision by filing a written petition to reconsider to the executive Director of Efficiency Maine Trust with 14 calendar days of notification of the contract award.

Each petition to reconsider must meet the requirements specified in Efficiency Maine Trust Rule Chapter 1, Contracting Process for Service Providers and Grant Recipients, Section 5(B), which can be found on the Efficiency Maine Trust website under Documents and Services:

http://www.efficiencymaine.com/docs/AgencyRules/Chapter-1_Contracting_Final.pdf