



Memorandum

October 30, 2024

To: Board of Trustees

From: Peter Eglinton, Deputy Director
Laura Martel, Senior Research and Evaluation Manager

Re: Proposed Sole Source Contract for SaaS E Solutions for effRT Migration

Proposed Motion

Move to authorize the Executive Director to enter into a sole source contract with SaaS E Solutions in an amount not to exceed \$350,000 for the period of November 1, 2024, to December 31, 2025.

Background

Launch Consulting is under contract with the Trust to maintain the Efficiency Maine Reporting & Tracking System (effRT). The effRT platform provides a unified data system that implements the technical reference manuals for all measures rebated by the Trust and standard data collection across all programs. The database supports reporting for internal and external stakeholders and supports the Trust's participation in the FCM by uniformly and accurately reporting incremental capacity savings monthly and forecasting FCM bids. It also provides configurable automated and manual workflow processes, supports customer, contractor, and intra-team communications, and provides a cost-benefit analysis tool.

Launch recently notified the Trust that Launch will be decommissioning the data center at which effRT is hosted. As a result, Efficiency Maine must now procure alternate hosting services and perform a migration of the effRT web application and database to the new hosting service by March 1, 2024.

Staff is aware that multiple utilities are in the same situation as the Trust. They also use Launch Consulting's product called EECF to manage their energy efficiency programs. These utilities also now find themselves seeking alternative hosting solutions.

Trust Staff has investigated several options to provide the database hosting and other services that it will need, including:

1. Hosting effRT on servers located at the Augusta office,
2. Migrating effRT to a colocation data center, such as Hostek, and
3. Migrating effRT to a cloud-based hosting service, such as Microsoft Azure.

After gathering information about these three options (and their costs) and seeking technical advice from a third-party database expert, Staff has determined that migrating effRT to a cloud-based hosting service is the preferred option. This option seems to Staff to be the most feasible option to ensure reliable access and ongoing maintenance of effRT. The deadline imposed by Launch Consulting does not provide sufficient time to conduct a competitive request for proposals.

SaaS E Solutions ("SaaS") is an entrepreneurial business and technology consultancy founded in December 2022 by a former Launch employee. SaaS is a woman-owned business providing Custom Computer

Programming Services, Cloud Infrastructure Setup and Management, Data Analytics, Hosting, Project Management, and Technical Consultation Services. Their employees have significant, recent experience working with the Trust Staff, the effRT database, and EECP. Several of the EECP clients who are in similar circumstances to the Trust have engaged SaaSe's services to migrate their instances of EECP to Microsoft Azure. Those migration projects are underway now and the first project is preparing to make the transition from Launch's data center to Microsoft Azure, awaiting the final file transfers.

SaaSe provided a price quote of \$350,000 for the data migration, hosting and maintenance, and ongoing support:

1. effRT Migration: \$36,000 (fixed fee)
2. Hosting and Maintenance: \$8,000/month (fixed fee)
3. Enhancements and Ongoing Support: \$210,000 (time and materials, not to exceed)

The hourly rate (time and materials) is \$150/hour (same as Launch) and we direct the activities based on requested updates from the program teams. We do not have a current backlog of requested changes. Launch is currently funded for \$300,000 for one year.

Section 3(B) of the Chapter 1 of the Efficiency Maine Trust Rules (Procurement Rule) indicates that the Trust:

may use a sole source procurement when: (1) the service provider has unique qualifications, resources, or experience; (2) there is not enough time to use a competitive bidding process; (3) the Trust finds that the program or required service would clearly benefit from a sole source procurement; or (4) the service provider is an identified partner in a grant proposal that has been submitted by and awarded to the Trust. The decision whether to use a sole source procurement for \$10,000 or less is delegated to the Executive Director of Efficiency Maine Trust. The decision to use a sole source procurement for more than \$10,000 will be made by the Efficiency Maine Trust Board, or may be delegated on case-by-case basis by the Efficiency Maine Trust Board.

It is appropriate to employ the sole source authority in this situation, given SaaSe's expertise, experience, and resources to complete the effRT migration before the Launch-imposed deadline of March 1, 2024. Prior to December 2025, the Trust will issue a Request for Proposals (RFP) to secure a longer-term contractor.