Request for Proposals (RFP) LR1801
Demand-Side Management Cost-Effectiveness Tool and Reporting Platform

ADDENDUM 1: Responses to Questions
Version Dated: April 27, 2018

1. What is the total number of programs across all the Requestor's members who will be loading data into the CET? In this case we would define a program as having a distinct service area/utility, program name, sector, budget, and/or workflow with a set of program rules, goals, measures and tasks/forms. For example, if two separate members have the same name for a program, this would be counted as two distinct programs because each has a distinct service area/utility, budget and workflow.

   Due to variation in how utilities define and report programs, as well as future utilities needs over the course of this project it is not appropriate to quantify a number of programs. If the number of programs is critical to the operation or pricing of the proposed solution, this should be explained in the proposal and will be addressed during the specification development and work plan stage prior to contracting.

   Typically, a program will be considered unique to one POU for reporting purposes, even if another POU offers a similar/identical program.

2. On Page 5, the RFP mentions that the CET should allow for upload of Requestors' members' Excel-based tool results from previous years, in comma-delimited (.csv) format; will the data files be the same across all the Requestors' member organizations (i.e. can we expect the data layout and formats to be consistent)? Can the Requestors' members be asked to provide the data in a specific layout and format other than .csv? In other words, if a data transformation is required to load the data into the Vendor's tool, who is responsible for this effort, the Vendor or Requestors' members?

   It is reasonable to assume that members can provide data in a consistent format using a template provided by the vendor. .csv is listed because it is readily available and understood by member organizations. Vendors should address any pre-processing steps including data transformation that are required (e.g. preparing a .csv input file(s) based on a provided template) as part of the user experience as requested in section 5.5 of the RFP.

3. If the load shape, retail rates, and avoided cost data need a data transformation to load into the Vendor's tool, who is responsible for this effort, the Vendor or Requestor's members?

See response to #2.

4. Is there a budget or expected cost range for this work that the Requestors can share with us?

The budget for the work to be performed will be contingent on the value provided by the tool or platform developed by the successful Respondent to the RFP. However, Respondents should recognize that individual utilities may be willing to pay for additional features that are beyond the basic cost-effectiveness test requirements. Therefore, it is recommended that an "incremental price structure" be developed and provided to allow Agencies and their Members an ability to understand all of the additional services that each Respondent may offer to provide in the CET and reporting platform being offered.

Requestors are seeking a quality base product all utilities can use and flexibility for individual or a group of utilities to request additional features at competitive rates. As noted in Section 6 of the RFP, one of the evaluation criterion that will be used to score responses is "Competitive rates for requested services." Requestors are not seeking the most competitive bid for quality CET and RP solutions that effectively satisfy their needs, including the flexibility to request additional services to the base product.

5. Can the Vendor propose a platform-built solution with an annual licensing fee structure to support and enhance the solution over time? Or is the solution expected to be built and delivered to Requestors who will then manage it internally, with no ongoing support from the Vendor?

The members anticipate some sort of ongoing arrangement to support and/or enhance the solution over time.

6. Is it anticipated that the CET and Reporting product will become the property of the POU consortium upon delivery? Or, for an existing software product, might we propose the product be licensed, maintained and supported post-delivery November 2018?

Member preference is that the solution is developed in an open source format that has the option to be transferred to, hosted by and modified by another party at the end of the initial contract period. However, we will consider an ongoing license structure where the option to transfer the tool to another host is not provided.

Regardless of the solution ownership and fee structure, the members anticipate some sort of ongoing arrangement to support and/or enhance the solution over time.

7. Will answers to questions posed by all respondents be shared as an addenda?

   Yes. This addendum contains responses to all questions the Agencies received.

8. Will a list of all respondents be shared as an addenda?

   No.

9. Do we know by when the eTRM will be completed?

   No. It is unclear when the eTRM will be completed.

10. What do you mean by "…application…may be maintained by Requestors' members if desired."? (Page 2, second paragraph.) Are members only interested in maintaining the data, or do they want to maintain the application code and deployment?

    Members may want the flexibility to do both, either in-house or hire a third party as needed.

11. What does the requirement for an "open source stack" mean? Does the application have to be written in an open source language (e.g. JavaScript)? Or is it enough that compilers are readily available?

    The intent for this language is to enable members to perform what is described above in answer 1 and to avoid falling under a proprietary product that will require a sole source vendor to maintain and update when required. If a proposal contains proprietary material, please describe how the product will overcome this barrier and satisfy the preference of enabling members ongoing maintenance capabilities in an independent manner.

12. Also, would the "open source stack" prohibit the use of an existing web service?

    The language for open source stack was not intended to prohibit an existing web service, it is a preference among utility members for the reasons stated above.

13. The RFP says "For web-based solutions, users should only have access to their utility's data." Does this also apply to non-web-based solutions? Does "utility data" imply access is limited to inputs only? If it implies access is also limited to outputs, then how does this guidance of limiting access to data compare to the requested optional task of online public reporting (section 2.4)?

Utilities should be able to work with the tool and have access to all inputs and outputs without any data being accessible by unauthorized users. When complete, utilities should have the ability to publish, or make available, a subset of inputs/outputs for public reporting purposes.

14. For web-based solutions, annual hosting fees may be required. How long should proposers budget for such annual hosting? Through 2029 seems overkill, so is there a logical alternative?

Plan for an initial 3-year term with the option to extend for 1 or 2 additional 3-year terms.

15. The California Publicly Owned Utilities Energy Efficiency Reporting Guidelines – 2017 indicated reporting guidelines for cumulative savings are still under development. Cumulative savings calculation methodologies range from simple to complex. What additional information can the Requestors provide about the approach for cumulative savings reporting to better inform bidders responses?

This will be finalized during the specification development and work plan session but respondents should plan to consider measure savings (1st and second baseline), savings degradation, measure useful life (1st and second baseline) and other relevant parameters when calculating cumulative savings.

16. Regarding the "OPTIONAL Public Website" described in section 2.4 on Page 6: The RFP cites an example of the CPUC website, EEStats. EEStats is actively maintained by a CPUC staff member although new annual inputs are collected, cleaned and QC'ed with support from a third-party consultant on an quarterly and annual basis. Is the Requestors' expectation that the contractor would simply set up the website and populate it with 2018 data but future years (i.e. PY2019 data) would be updated by CMUA staff?

No, not necessarily. Requestors would like to know what the annual cost would be for the Respondent to update and maintain the data annually.

17. Page 10 states "All proposals shall address the following items in the order listed below and shall be numbered 1 through 9 in the proposal document." The list following contains only 8 items. Can you please clarify if a 9th section is missing or if this is simply a typo?

This is a typo.

18. Are resumes included as part of the 40-page limit to the proposals?

No, they are not included in the 40-page limit. However, each resume should be no more than 2-pages and limited to the key personnel identified pursuant to subsection 5.4 of the RFP.

The following is a revised timeline for the RFP and replaces the Tentative Timeline in Section 4 of the RFP:

RFP Issued	April 10, 2018
Deadline for questions, clarifications	April 18, 2018
Proposals Due	May 4, 2018
Finalists notified	May 16, 2018
Finalists interviews	May 23-24, 2018
Selected Respondent(s) Notified	May 28, 2018
Specification Development & Workplan Sessions with Selected Respondent(s)	June 4-5, 2018
Contract Executed	June 15, 2018