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- 1. The RFP includes a new "Data Privacy Check" component that was not present in the RFI yet there is no mention in the RFP of the functionality requirements for this component. Can you please elaborate on what NEEP's vision for this component is? Where will the conditions by which data is considered "public" or "private" be derived (or come from) if not from the data source itself? Will there be some other input data stream or defined standard by which data will be judged to be "public" or "private"?**

Initially for all data sources, HELIX v1 operating rules will stipulate that only public or homeowner-permitted information would be uploaded into the database. In terms of future development, data sources may have their own rules regarding sharing of their information or internal tracking system for determining how information can be shared, and NEEP's responsibility will be to help data providers to HELIX explore those issues. For the initial product development effort in the first year, there is no expressed need for a data privacy check. NEEP will work with individual data providers to establish an understanding that only publicly available data should be part of HELIX. The RFP and its graphics have been updated to reflect this change.

- 2. Why is the "Data Privacy Check" located between the data request and HELIX, rather than earlier in the process, so as to protect HELIX from accessing private data?**

The notion of the Data Privacy Check is to be decided on a case-by-case basis with data providers to HELIX. NEEP's intention is to eliminate the need to store personally identifiable information or sensitive information in HELIX.

- 3. HELIX v1 clearly specifies DOE HEScore as an input data source. Is the expectation that HELIX will on[ly] RECEIVE data from HEScore, or will HELIX need to both submit data TO and receive data FROM the HEScore engine?**

HELIX will only RECEIVE information from HEScore.

- 4. Under Services to be Performed, Develop web services with a focus on transmitting home energy information, there is a reference to the requirement for a minimal web-based interface or web site to browse home energy information. Can you clarify 'minimal'? Would a dashboard interface fit this requirement? Are certain visualizations required, i.e. maps or charts?**

The minimal web-based interface would provide the functionality already inherent in SEED with a few additional views for public users to learn more about HELIX. Different levels of user permission sets would be established and incorporated into this web interface to allow different classes of users (e.g. real estate professionals, utility program administrators, state energy offices) different levels of access to information. These levels of permissions are stated at a high level in the Appendix of the RFP [product backlog].

[Question #4 continued] At this time, it is envisioned that HELIX users would export data to create any desired visualizations using a separate program/tool outside of HELIX. Additional visualizations and custom report generation is not required.

- 5. Under the Services to be Performed, reference to the SEED Database as a foundation, and associated references in Assumptions and Appendix B: Product Backlog, related to SEED improvements for residential applications; will SEED improvements made by the awarded bidder be in conjunction with improvements made by DOE or influence changes made by DOE?**

SEED improvements would add to and expand efforts currently underway through the supervision of the US Department of Energy to further develop SEED for use with residential properties. These changes may also influence the US Department of Energy to make further investments in SEED to make the platform increasingly viable for the HELIX use case. The selected offeror will have to become a SEED Technical Ally to be able to make changes to the SEED core for the open-source project. The central product backlog of issues is managed by the US Department of Energy and the current SEED team.

- 6. Under the Assumptions section, there is mention of "multiple records per residential housing unit". Please confirm that this simply refers to the fact that for a single address, different/unique data may come from multiple data sources and will need to be consolidated into a complete data set for that address. If this is not the intent, please clarify.**

Yes, "multiple records" refers to data from multiple data sources for a single property/address. Please see Product Backlog #20 for how cases of multiple data sources for the same property should be handled. There could be three distinct cases for this: first, there could be different sources of data for a given residential property – i.e. HEScore and HERS; second, there could be revisions of the same source of information; third, there could be inaccurate or imperfect information per the address – i.e. 12345 Any Road versus 12345 Any Rd. NEEP expects that the offeror leverages SEED's current functionality with other methods to satisfy these scenarios. Where there is not a perfect solution, HELIX should have a user interface to help administrators solve more complex issues in data for review.

- 7. Under Minimum Qualifications, does expertise in data storage and transfer refer to physical storage infrastructure or logical database, file storage, retrieval, and transfer?**

The intention of the minimum qualifications is to state that the firm has previous experiences similar to those stated in the RFP. This sentence will be stricken to avoid confusion.

- 8. Under Appendix B: Product Backlog, #15, for delta changes in bulk download, would there also be a requirement during the bulk load process to evaluate updates made through UI or web services?**

There will be no such requirement. For public records data aggregators and MLS's, the presumption is that these firms would have the resources to develop views to understand changes in data to be uploaded or transferred to their systems from HELIX.

9. Under Appendix B: Product Backlog, #19, are there specific metrics for high availability; time related - seconds, minutes, hours or percentage as in 99.XX availability?

For the initial build and first year of product development, NEEP is not seeking a strict definition of uptime and has no need for a high availability system as to be considerate of costs needed to establish such high uptime quality. NEEP seeks that the offeror make their own best estimate of the uptime needed or supported within their proposal.

10. Under Appendix B: Product Backlog, #23, is there a requirement for a specific reporting tool? Do the reports need the capability to be exported to any specific format?

Generally, NEEP seeks that the offeror be able to export reports in common formats, such as CSV files and other formats currently supported by SEED. There are no specific or special requirements for upload to a specific reporting tool or the need for a specific reporting tool to be installed. NEEP believes that SEED currently supports the needs of this product backlog item.

11. In the Product Backlog section, item number 24 refers to the need to "mash other data with HELIX such as MLS data to match records". Can you please elaborate on how this function is to be accomplished? How will the data from the "mash source" (MLS) come into HELIX for comparison purposes? Can you provide an example of how NEEP envisions this process to work?

As stated above in the answer the previous question, the scope of PBI #24 is to help understand the potential cases where home energy performance data could need advanced manipulation for HELIX. The references to MLS's will be stricken in the revision of the RFP. As with much of the approach of the RFP, NEEP is open to understanding alternative approaches.

12. Under Appendix B: Product Backlog, #26, is there an estimated number of concurrent users for the system?

For the initial build and first year of product development, NEEP is not seeking that the system be load-tested for thousands of concurrent users. There is a low-effort requirement to maintain a small subset of users of 100 or less. The product backlog item is more focused on the capability to scale the system to a high number of concurrent users in the future with more effort from the offeror.

13. In the major services described on page 4 there is a request to import and export csv files. Is it envisioned that both admin users and end users will need both import and export capability? Our assumption is yes, both user types need both capabilities, but the only mention in the product backlog is for end users to import csv files into HELIX.

Administrator-level users will need to have both import and export capability for basic system upkeep purposes. Approved users may also have import and export capability, and user permission sets provided for different stakeholder types will govern to what extent individuals can utilize this functionality.

14. Why is the bulk data ingest described as taking CSV files, rather than another XML standard such as HPXML?

Solutions that allow for bulk upload through multiple formats aside from CSV – notably HPXML – are preferred. Once again, the inherent functionality in SEED could be improved to provide alternative formats for bulk upload for approved users beyond CSV and HPXML files.

15. Will associated PDFs need to be transferred through the bulk data ingest as well as the data itself to pass these along to the MLS?

At this time, the storage of files associated with home energy performance data is being reviewed for HELIX. HELIX would prefer to be a lightweight system without the need to store alternative file formats, if the originating data source would continue to store files, such as PDFs. Alternatively, PDF files may provide a higher resolution of home energy performance data. NEEP is open to ideas on the correct approach.

16. Does the RESO Silver Certification level and DOE's Home Energy Score address the data fields required by MLS? Have MLS groups already reviewed their data quality requirements?

The RESO Data Dictionary provides standardization for real estate data management, and MLSs are encouraged to adjust their data architecture in order to align with the RESO Data Dictionary. The [RESO Silver certification level](#) was established as a target to bring MLSs into partial compliance with RESO Data Dictionary definitions, and a goal of January 1, 2018 was set to encourage MLSs to begin the conversion. It is intended that HELIX will scale up in concert with local MLS adoption of data standardization efforts; notably, the Silver certification level includes the rigorous data architecture required to accommodate several “green” fields.

17. Has NEEP considered utilizing a Unique Building Identifier for residential buildings to ensure files are matched to residences appropriately?

Ideally, HELIX would have some notion of a unique ID associated with addresses or a given residential property. SEED may already have some level of functionality with regards to property IDs and management to satisfy this need.

18. Since March 26 is a Sunday, is there a certain time of the day that proposals must be received?

Proposals must be received before 12:00 AM Eastern Standard Time (EST) on March 27.

