



QUESTIONS AND RESPONSES POSTED ON JULY 1, 2011

1. Is NEEP's interest in only having the Data Collection Tool in Excel format (or similar) templates or would they be open to a controlled web interface for direct input, allowing the import process to be circumvented?

NEEP is open to other approaches for implementing the data collection process. Excel was proposed only because it is a commonly used tool that is simple to customize, distribute and use.

2. Does NEEP know all the programs run in the various participant states at this present time, which would be entered into the database?

The list of programs needs to be extensible.

3. If the state users are going to use templates, are they going to be specifying program names? If so, how will data consistency be maintained? (e.g. they may report the same program data with different names in different quarters).

In the future, there may be a categorization of program names to program categories that will allow data from similar programs to be combined. But this is not a requirement of the initial implementation.

4. What is the expected frequency by states of uploading templates or direct input of EE data expected to occur?

States will submit data on an annual basis. But the data submittal process will likely occur over a period of weeks, potentially with several rounds of editing and corrections before the "official" submission.

5. What is the expected frequency of running and extracting reports?

The reporting process is meant to run annually, producing the individual and combined reports. However, the reporting process should be repeatable, and in all likelihood will be run on an as-needed basis, to generate a number of draft reports and outputs.

6. Can you elaborate on the clear distinction between Task 3: Administration and general training and go-live support in Tasks 4 & 5? The way the explanation currently reads in the RFP, is sounds like what is noted in Task 3, is covered by Task 4 & 5. We appreciate the clarification.

Task 3 is your support for the initial round of data collection and report generation at the beginning of 2012. This may mean interacting with the different states as they go through the data collection process, and ensuring that all the processes work correctly.

Task 4 is providing general training materials, both for use during the data collection in 2012, and for the future.

Task 5 is helping NEEP understand the costs of extending the development and support contract, both for out of scope tasks during the initial engagement, and for the support of additional development and maintenance tasks in the future.

7. Will states be able to see data/reports for other states?

All generated reports are publicly available.

8. For reports number 11 - 14 on page 18, will those reports be publicly available and/or available to the state users, or will they be available only to NEEP users?

All generated reports are publicly available.

9. If they are publicly available and/or available to the state users, will the data within them be visible at the state level (meaning the data will be clearly broken out by states) or only at the aggregate level?

For Report 11, for example, there will be a line of data for each individual state and an aggregate total line.

QUESTIONS AND RESPONSES POSTED ON JUNE 30, 2011

1. A follow-up question from Question #1 posted on June 27 below: When you say that the Import Process, Central Database, and Export Process should run on a Windows machine, is the expectation that it will run on an existing machine that NEEP currently uses, or are you anticipating the purchase of a new machine for the purpose of hosting this database?

We anticipate that the Import Process, Central Database and Export Process will not impose enough of a full-time load to require the use of a dedicated computer to process. In any case we'd appreciate your detailed requirements for system hardware and software.

QUESTIONS AND RESPONSES POSTED ON JUNE 29, 2011

General Questions

1. Would states voluntarily adopt the energy efficiency reporting guidelines? If so, does NEEP already have commitments from state regulators and/or program administrators to use REED once it is designed and implemented? Does this commitment extend to all program administrators in the state or would the consultant be expected to market the benefits of this tool (including the benefits of consistent reporting) to non-participating states and/or program administrators?

Contractor is not responsible for marketing or building commitments for states to use the tool. To date, state commitment is in the form of EM&V Forum Steering Committee adoption of the Common Reporting Guidelines.



2. Would NEEP staff have the ability to collect and/or manage data that are entered by individual program administrators? Would NEEP staff be responsible for managing data (i.e. collection, verification, and reporting)?

Yes, NEEP staff would maintain the database and manage data collection, but with contractor assistance with testing.

3. Would NEEP house the central database (i.e. system administrator) or would individual program administrators have the ability to manage their own data (i.e. run queries)?

Please see the response to Question 1 below posted on June 27, 2011

4. Does NEEP have state buy-in to report data (especially impacts) in the manner that is defined in the Common Statewide Energy Efficiency Reporting Guidelines? Would the consultant be responsible for educating program administrators on how to report data in the manner specified by the reporting guidelines (i.e. how to report lifetime savings especially if the utility does not already do so).

As noted above in #1, the contractor is not responsible for building commitments for states to use the tool. The contractor's tasks include holding training webinars and developing FAQ material. To clarify, the state audience is not necessarily program administrators, but State Energy Offices or other state agencies that will be responsible for data collection.

5. Will you accept a hosted solution instead of one built for NEEP to own?

As conceptualized, REED is not a hosted solution. NEEP would be concerned about the long term maintenance or licensing costs to maintain the system over time, the tie-in to a single vendor, and the costs and difficulties of making changes in the future.

However, NEEP is open to evaluating innovative proposals that address these concerns.

Questions on NEEP Professional Services Agreement Contractor Terms & Conditions

1. Section 1 Definition of Terms:

- a. 1.1 - "Forum Project" is used to define the "Project" yet Forum Project is not actually defined anywhere in the agreement. Is Forum Project supposed to be EM&V Forum Project?

Yes.

- b. 1.6 - The definition of Project includes information "defined by Company." How and where will such information be provided to Contractor?

In the Scope of Work.

- c. 1.7 - Is the definition of "Subcontractor" intended to cover consultants of the Contractor that were hired previous to the Contractor entering into this Agreement



and for purposes other than the Project, but that may assist with Project deliverables?

Yes.

- d. 1.8 - "Agreement" seems to be defining a separate agreement between the parties and is somewhat confusing since the definition is provided in this document which is referred to as "this Agreement." Is "Agreement" different from "this Agreement"?

No.

2. Section 2.2 Purchase Orders: "Price" is utilized as a defined term yet it is not defined anywhere in this agreement. Is there another document where Price is defined?

No (amount of contract).

3. Section 4.1 Termination: The language at the end of the first sentence is confusing, "of this Agreement regarding Contractor's performance hereunder." Please clarify what the intent of this sentence is since the provision highlighted above does not flow from the previous part of the sentence.

The intent is general termination without cause language (appears the word "of" should be removed).

4. Section 5.1 Obligations in the Event of Termination: This section makes reference to "joint property" of the Contractor and Company which contradicts Section 10.1 and 12.1. There is also reference to payment and reimbursement of expenses that contradicts the terms of Section 4.6 and Section 4.7. Please clarify how the various sections work together.

Joint property refers to Contractor having internal use. Company becomes sole owner of property. Section 4.6 defines what are reasonable payments and reimbursements.

5. Section 8.1 Audit and Maintenance of Records: The last sentence is confusing. Do you mean "If Contractor agrees that a discrepancy exists"?

No (if Company agrees with audit results).

6. Section 10.1 Title to Plans and Specification: The provision states that any information prepared by Contractor pursuant to the agreement will be the sole property of the Company (see comment to Section 5.1 for contradictory terms). Please clarify.

See #4 above.

7. Section 11.4 Patent Infringement and Indemnification: The use of the defined term "Project" does not make a lot of sense in the context of this provision. Project is defined as the complete scope of work. What is exactly meant by "Project" in the context of this section (maybe deliverables of the Project)?

Yes.

QUESTIONS AND RESPONSES POSTED ON JUNE 27, 2011



Questions on APPENDIX B: REED REQUIREMENTS

Page 15 - Introduction

1. Where does NEEP expect the REED system to reside and what is the network platform?

We expect the Import Process, Central Database and Export Process to live on a Windows machine on the NEEP LAN. The Reports generated by the Export Process will be made available through a web server.

Page 16 - Data Collection Tool

2. Is there a particular version of Excel that will be used by all users of REED?

We want the Data Collection Tool to be available to users without requiring an upgrade to the latest version of Excel. Unless there are compelling reasons that would require a newer version, we would propose standardizing on Microsoft Excel 2003 or newer.

3. Can you provide any further clarification on this requirement (“numbers that don’t make sense”) or give an example?

For different data entry fields in the Data Collection Tool, NEEP will provide guidelines that will flag possible data errors. These may be in the form of ranges (min/max numbers or dates), domains (lists of acceptable values), formats (telephone numbers, zip codes), existence (the values are required), etc. These will need to be implemented in a way that restricts the data input, or specifically guides the user on what is expected.

QUESTIONS AND RESPONSES POSTED ON JUNE 23, 2011

Questions on SCOPE OF WORK, DELIVERABLES and SCHEDULE

Page 6 - TASK 2: Development

1. How many sample users will be available for testing?

We anticipate at least 3 internal (NEEP) testers, and up to 10 external testers.

2. Who are the “expert and stakeholder” to give recommendations for future tool modifications?

Recommendations about changes and improvements will be collected from all users and other subcommittee members. These will not impact the current project, but will be gathered to inform the design of future phases.

Page 6 - TASK 3: Administration

3. When did “program year 2011” start?

Program year 2011 is from January 1 2011 through December 31, 2011.

4. Does NEEP operate under a Fiscal Year or Calendar Year?

Calendar year.



5. Is the reporting tool to be made available by January 1 or January 31, 2012?

We anticipate starting the data collection in January 2012, but not all states will have data to return their completed data collection tools until the end of March, 2012 at least.

At any point though, once we start collecting results from any respondents into the central database, we should be able to run the reporting process after January 1, 2012.

6. What is the frequency of reporting? Quarterly?

Data is collected from each respondent for annual results. So once the data collection and reporting has been completed for 2011 sometime in mid-2012, we don't anticipate running the entire process again until 2013.

7. Are the "State users" Forum Participants?

Yes.

Page 6 - TASK 4: Training and Documentation

8. What are the anticipated presentation dates and time duration for the contractor delivered webinars?

We anticipate that there will be one webinar concerning the use of the data collection tool in January 2012. There will be a second for the reports that are generated in March 2012.

9. Will the recorded webinars include comments/questions from Forum participants and other stakeholders?

Yes.

10. Does NEEP have a preferred product for webinars such as "GoToMeeting" or "FreeConference"?

NEEP typically uses GoToMeeting. Whatever platform is used should have the ability to record and replay webinars.

Page 6-7 - TASK 5: Ongoing Maintenance and Support

11. Please give us a list of these new functional modules (reports, and analyses) that already have been identified for future development.

One example is a budgeting module that might show how a state is performing in comparison to their anticipated (planned) impact. The list is not complete, and will be developed in more detail during 2011.

Page 7 - Project Management, Budget, and Schedule

12. On page 7 the Design phase is shown as being July-August 2011, but on page 6 under Task 1 the Design is to be completed by the end of September 2011. What is the correct delivery date for Task 1?



August 31, 2011.

13. Is REED expected to be in full production on February 1, 2012?

Yes, all the modules should be compete and operational, although not all respondents will have returned their data by that time.

14. What is the time duration of the Kick-Off Meeting, Subcommittee Teleconference Calls, and Presentation to Steering Committee?

The kick-off meeting and subcommittee teleconference calls are generally 60 - 90 minutes. The presentation to the Steering Committee will likely be 30-45 minutes.

Questions on GENERAL SUBMITTAL INFORMATION

Page 8 - C. RFP Submittal Format and Due Date

15. Please clarify the term "electronic signature". Are you referring to an actual signature in a jpeg or gif format OR a pdf of the letter with a signature?

Either is acceptable, as long as it binds your firm.

Questions on PROPOSAL SUBMITTAL REQUIREMENTS

Page 10 - Section A: Submission of Proposals

16. If "optional tasks and budgets" are added to the proposal, will the page limits in the RFP remain the same?

You can go beyond the stated page limits to describe optional tasks.

Page 12 - Section V. 5: Budget and Billing Rates - Budget Table 2.

17. Is NEEP viewing each Task as a separate Purchase Order?

No, there will be a single purchase order for the project.

18. Please clarify what data you are requesting for the "Labor Costs", "Directs Cost (to be billed at cost to the consultant)", and "Per Task or Total Cost" columns

The breakout in Budget table 2 is mostly informational, helping us to understand how you plan to allocate your time performing the different tasks on the project. The key is really the total, not to exceed amount.

- "Labor Costs" is your estimates for the blended rate of the staff you will need to perform each task.
- "Direct Costs" are travel or other related expenses. These should be identified in your proposal, and need to be approved by NEEP prior to the expenditure.
- "Per Task or Total Cost" is the sum of all the costs (blended rate * number of hours + anticipated direct costs) for each task.



Budget table 1 will help us understand your cost structure, which will be useful in making decisions about extensions for additional work that might arise during the project.