Redwood Coast Energy Authority

REQUEST FOR QUALIFICATIONS
RFQ 20-608

Database Development and Implementation

Date Issued:
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Redwood Coast Energy Authority Contact:

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Proposals Accepted on an ongoing basis until September 18, 2020.
First Review on Friday, August 28, 2020.

*Only E-mailed Statements of Qualification (SOQ) will be accepted.
SOQs must be submitted electronically to: pterry@redwoodenergy.org

REQUEST FOR QUALIFICATIONS

I.   INTRODUCTION

Redwood Coast Energy Authority (RCEA) is a Joint Powers Agency whose members include local governments in Humboldt County. RCEA is also a Community Choice Aggregator (CCA) serving customers in Humboldt County. The purpose of the Redwood Coast Energy Authority is to develop and implement sustainable energy initiatives that reduce energy demand, increase energy efficiency, and advance the use of clean, efficient, and renewable resources available in the region.

RCEA has been an implementer of energy efficiency programs in Humboldt County since 2003. Our current Demand Side Management (DSM) programs include a non-resource Local Government Partnership with Pacific Gas & Electric Company (PG&E) and several customer programs funded by the CCA. In May of 2020, RCEA also became a Program Administrator using the Elect to Administer Pathway for two ratepayer-funded Energy Efficiency Resource Programs. RCEA will administer programs serving over 55,000 customers in Humboldt County.

In order to optimize our services to the community, RCEA requires a database to support reporting; enable data driven marketing; track customer interactions; and manage project, services, and referrals.

RCEA is exploring the potential of partnering with similar organizations for combined purchase of a cross-organizational tool.

II.   OVERVIEW

RCEA solicits responses to this RFQ from interested professional services consultants (Respondents) qualified to develop and implement a database solution for DSM programs. Statements of Qualifications (SOQ) will be reviewed and those determined to be qualified will be requested to submit a proposal for the upcoming RFP.

Currently, RCEA owns and maintains two Microsoft Access databases primarily to track customer interactions, energy assessment data and project management. The databases were originally developed to support a Residential and Non-Residential PG&E Direct Install Energy Efficiency Program that has now sunset. The databases also supported the PG&E reporting requirements of the program in conjunction with multiple tracking spreadsheets. The Residential database was adapted to also support walk-through home assessments and reports as well as a CCA funded Residential Energy Consultation and Energy Efficiency Kit program. The Non-Residential database supported Direct Installations of Deemed Measures, Custom Lite Measures, Full Custom Measures, customer outreach tracking, and also supported the Proposition 39 School Energy Efficiency program.

RCEA also has contracted access to a third-party managed Customer Relationship Manager (CRM) built on the Microsoft Azure platform. The CRM tracks interactions between the third-party customer support team and CCA customers. The database imports PG&E 4013 and billing data and the RCEA staff primarily uses the CRM to access account information including energy usage and billing history.

RCEA seeks to streamline tracking, data access, project and program management and reporting support into a single database solution. At a high level, the database would ideally provide the following use cases, although we are open to other proposed solutions.

1. Provide separate but linked repositories for site and customer information, including but not limited to:
    a. Site information
        i. Location and address
        ii. Built environment data (appliances, lighting, HVAC)

        iii.   Energy use intensity
- b. Customer information including:
  - i.   Contact information
  - ii.   Account numbers, rate schedule
  - iii. Meter Location
  - iv. NAICs Code
  - v.   Customer energy usage and billing history

2. Customer Relationship Management:
   a. Customer service interactions
   b. Customer program participation (RCEA programs)
   c. Referrals to external third-party program implementers
   d. Support customer marketing/outreach tracking and data analysis
3. Project Management, including but not limited to:
   a. Track project progress and status
   b. Assignments of roles to staff members
   c. Record data entry from site assessments
   d. Track measures installed or incentivized
   e. Track financing status
   f. Import and/or track data from external savings tools (i.e. Modified Lighting Calculator)
   g. Track contracting, change orders and compliance
   h. Calculate project financials including cost savings, payback, net present value
4. Program Management and Reporting Support, including but not limited to:
   a. Track customer flow from application through assessment and project implementation
   b. Track customer qualifications
   c. Track energy savings goals
   d. Data export in required format for CPUC and PG&E reporting
   e. Ability to easily query data for internal and external reporting and performance
5. Remote access capability for all features of the database
6. Meet data security and confidentiality requirements and set user permissions
7. Additional desired uses would include the ability to:
   a. Import Deemed measure data from eTRM or DEER
   b. Support management of resource program cost effectiveness target (Total Resource Cost >1)
   c. Forecast program performance
   d. Visualize historic energy usage (including interval data)
   e. Remote entry of assessments by tablet
   f. Synchronization with third-party CRM
   g. Import of existing data from MS Access Databases
   h. Support Energy Calculations (savings, EUI, Blended rates)
   i. Track event/workshop participation
   j. Secure File Transfer
   k. Secure chatter
   l. Accept online customer applications
   m. Produce customizable customer reports (estimates, agreements) and contractor reports (scope of work, equipment list)
   n. Track program funding and budgets

III.   SERVICES SOUGHT
Qualified respondents should demonstrate the ability to provide the following services:

- Support RCEA with expanding on our initial in-house developed Needs Assessment;

- Review existing databases and tools for integration into the new database solution;

- Either adapt an existing off-the-shelf database to meet RCEA data tracking and reporting needs;

- Or develop, test, and implement a new database to meet the determined needs;

- Provide staff training;

- Support the database through a stabilization period and provide adjustments;

- Provide ongoing maintenance for the database;

- Potentially add new modules for additional programs as they come online.

IV.   QUALIFICATIONS SOUGHT
Respondents should demonstrate the following qualifications:

- Experience performing the services sought in the above section;

- Experience with providing services to the energy sector, particularly CCAs;

- Development of an existing database currently in use;

- References for similar work;

- Ability to provide the desired services cost effectively;

- Ability to work within a schedule with minimal delays.

V.   SCHEDULE

RFQ Process	August 18 – September 18, 2020
Proposal Review	Ongoing, starting August 28, 2020
Last Proposal Review	**September 18, 2020**
Interviews/Product Demonstrations	September 1 – Oct 2, 2020
***Anticipated RFP Process**	**October 12 - November 6, 2020**
*Anticipated RFP Award Date	November 19, 2020

- Dates subject to change

VI. SUBMISSION REQUIREMENTS

Each Statement of Qualifications (SOQ) submitted to RCEA shall be in accordance with the following instructions and requirements:

1. Each SOQ shall be submitted to the Redwood Coast Energy Authority by e-mail:
   > To: pterry@redwoodenergy.org
   > CC: mbithell@redwoodenergy.org
   > Subject Line: RFQ 20-608

2. Only e-mailed submissions will be accepted. We strongly recommend e-mailing submissions before the deadline time, as server delays may lead to late responses.

3. Any questions of clarifications related to the content of the RFQ must be submitted to pterry@redwoodenergy.org via an request for information (RFI) no later than **August 21, 2020 at 5pm.**

4. Each SOQ must include the following sections:

   1. **Executive Summary**
      Provide a concise summary of your firm's qualifications including key organizational information. Please also include:
      a. Name, address, contact numbers, email
   2. **Core Competency**
      a. **Experience:** Please describe your experience with the following:
         i. Performing a database needs assessment.
         ii. Integrating old tools (databases and spreadsheets) into new database solutions;
         iii. Training and/or producing training materials and manuals;
         iv. Specific experience with working with the Energy Sector.

      b. **Service Methodology:** Describe your approach to development and implementation of database solutions. Please address:
         i. Adherence to budgets and schedules;
         ii. Milestones;
         iii. Quality Assurance;
         iv. Technical Support;
         v. Data security and compliance with organizational policies.

      c. **Product Examples:** Describe any databases currently developed by your firm or in development. *Qualified respondents will be invited to schedule a demonstration of their products for the review team.*

   3. **Qualifications:**
      a. Resumes
      b. References for similar work;
      c. Applicable certificates and licenses

   4. **Fees:** Provide a fee schedule for standard services as described above.

VII.   EVALUATION PROCESS

An evaluation committee will review SOQs on an ongoing basis. Qualified respondents will be invited for further evaluation through interviews and/or demonstrations of their existing products. RCEA reserves the right to select the firms whose qualifications, in RCEA's sole judgement, best meet the needs described, to respond to the future RFP.

The following criteria, listed in no particular order of importance, will be used to select the firms for further evaluation:
- Firm experience
- Service methodology
- Ability to comply with schedule and budget
- Reasonableness of fees

RCEA will notify all respondents regarding their status as qualified or not qualified in writing by e-mail. In a case where a firm is deemed not qualified, RCEA will provide:
- Cause for disqualification
- Recommended next steps

Disqualified firms may resubmit before the deadline.

Qualified firms will be invited to submit a proposal in a Request for Proposals to follow the completion of the RFQ process.

VIII.   TERMS

RCEA may, at its sole discretion withdraw this Request for Qualifications at any time. Respondents are solely responsible for any costs or expenses incurred in connection with the preparation and submittal of an offer or proposal. All documents submitted in response to this Request will become the property of RCEA upon submittal and will be subject to the provisions of the California Public Records Act and any other applicable disclosure laws.