

MEMO FOR REQUEST FOR QUALIFICATIONS
Redwood Coast Energy Authority
Qualifications for Database Development and Implementation
RFQ No. 20-608

Addendum #1
August 28, 2020

To All Prospective Respondents:

The Redwood Coast Energy Authority (RCEA) herewith submits this memo for the Request for Qualifications 20-607. This memo includes questions asked by potential respondents and includes the answers or clarification.

- 1. Confirmation that Redwood Coast Energy Authority will start accepting responses to RFQ 20-608 August 28th, respondents have until September 18th to provide a response.**

RCEA will begin reviewing responses received starting today and respondents have until September 18th to provide a response.

- 2. Who will be using the database? How many users?**

Depending on how the licensing works, we would prefer to have all staff have access which may be 20-30 people at the most and could be as few as 15. Not all users will need all functionality.

- 3. Which CRM do you currently use? Will the new database outright replace the current CRM or will it be used in conjunction with new database?**

We currently use an Access database that was built for a San Francisco Bay Area commercial lighting program called Smart Lights. We purchased the rights to it made many modifications in house around 2012 to now. We also built another similar database for our residential program in Access. These databases will be replaced by the new tool. We also have a CRM used by the billing consultants that will not be replaced but will need to be used in conjunction with the new tool. That CRM is built on the MS Azure platform and ideally the two databases would be able to pass data back and forth/sync some fields.

- 4. Would you say the two most important goals for the new database are to streamline internal operations and provide a single access point for multiple datasets?**

Yes.

- 5. What third-party data sources will need to be integrated into the new database?**

Ideally the new database would integrate PG&E's customer data, the CPUC's statewide measures data and some information from our third party CRM.

- 6. What is the development schedule - start date, go-live date?**

We would like to start Development by Nov 1, 2020 and go live as soon as possible after that. We understand that development takes time and so have an understanding that we may be looking at a June 2021 "go-live date" but would prefer sooner. The programs that the database

will initially support have already launched on July 1, 2020 and data is being tracking across multiple tools.

7. What type of hosting/on-going maintenance will you be needing post-launch?

We intend to grow and add programs over time and anticipate needing modifications and support for the first few years after launch. The main programs that are being supported have three-year contracts and so we would likely start by committing to that timeline. If the data is hosted on the cloud, we require regular backups to our internal servers. We will also require updates when the third-party CRM changes and if/when CPUC reporting needs change.

8. What is the budget for the initial project development? Budget for long-term support?

We are seeking a cost-effective solution and have not yet released a budget. The budget will depend on the features of the database being offered. We are planning to budget for long-term support and as stated above will likely begin with a three-year commitment. Respondents may include pricing tiers with features defined as part of their proposals.

9. [4d] What is the required format for CPUC and PG&E reporting?

The CPUC reporting is required in a CSV file that is pipe delimited. For specifications, please see <https://cedars.sound-data.com/>

The PG&E reporting does not follow a format and is a narrative and count of activities performed.

10. [7a] What format does the data come from eTRM or DEER?

The eTRM data is also in a CSV file. DEER data is in Excel workbooks in several different formats.

11. [1] Why do the repositories need to be separate? Is it a security concern? The information could lie within a separate area of the same database.

Yes, the information can lie within separate areas of the same database. The intent is that it can be displayed, queried and organized in a site-centric manner, as well as a customer-centric manner.

12. [1a] How does the energy use data get into the database now and what is the desired input solution? Does it only come from site assessments?

Energy usage data is not currently input into the existing project management databases and is imported into the third party CRM using PG&E 4013 customer data. Ideally the customer data from PG&E could be imported directly into our new database.

13. [3f] Modified Lighting Calculator - what is its data format and where is it hosted? What data is input into the savings tool? Could the new solution replace this if more cost effective?

The existing calculator tool is a macro enabled Excel workbook that is constantly under revision. The inputs include customer energy usage data, existing and proposed lighting equipment, and building type. A cost-effective new solution would be welcome but must meet CPUC requirements for Custom Projects.

14. [7c] How is program performance measured?

The program performance may depend on the funding source. Most CPUC ratepayer funded resource programs are measured on adhering to budgets, energy savings goals and most importantly the Total Resource Cost (TRC). The non-resource programs funded by PG&E have

KPI's that were negotiated in our contract. These metrics include number of contacts made, assessments performed, reports delivered, leads generated, etc. Programs funded internally by the Community Choice Energy Program will have different metrics that are currently being established.

15. [7g] Will this be a one-time import of legacy MS Access data? i.e. import and switch to new system.

Yes.

16. [7k] Is the chatter meant for internal users? Customers?

It would be meant for internal users.

17. How many internal users?

See question # 2 above.

18. How many projected external customers? 55k?

The database would not be accessible by external customers, but it would contain their data. The number of customers is approximately 55k at this time.

19. Is staff training preferred on-site or virtual and how many staff members?

Virtual training is acceptable. Depending on the breadth of the training, there could be up to 20 people in attendance.

20. What is the estimated start of implementation once the bid is awarded and is there a desired completion timeline established at this time?

See question #6 above.

21. Are there internal colleagues tasked to a project team and if so, how many and what roles?

Yes, there will be an internal database team. The staff members have not yet been selected but will likely include the Director of Operations, Director of Demand Side Management (DSM), Senior Program Manager (DSM), Senior Project Manager (DSM) and a Technician in charge of IT support.