

RFP 25-605 Addendum No.1

Responses to Proposer Questions

This document contains the questions received on or before 6/10/2025, along with the corresponding answers.

- 1. Is there a website where we can see all the questions and answers after June 10? Or will this be done by email?**

Answer: We will provide answers to all questions received directly by email on June 17th. We will additionally post all answers publicly on our website via this addendum.

- 2. What is your budget? Budget range?**

Answer: The NREN budget extends until the end of 2027. We do not have a set budget for the database at this time, but would prefer that all costs from development, setup, support, and annual licensing fees to not exceed our placeholder amount of \$800,000 through 2027. NREN intends to select the best solution for our needs but will also be considering price as any cost savings from the database can be used to fund other program activities.

- 3. Do you have the money in hand to do this project, or will you have to request it?**

Answer: The funding for this project has been allocated by the California Public Utilities Commission (CPUC) and is paid to RCEA in quarterly installments, starting in January of 2025. Some of the money is currently on hand and funds for ongoing support of the database will be paid to RCEA in future installments.

- 4. What was the annual spend for the previous year on this Project?**

Answer: This project will start with the new database and our previous database costs cannot be compared to the new one.

- 5. If this is a new Contract, what is the annual Budget for this?**

Answer: See answer for question 2.

- 6. Are you open to a hybrid delivery model with a mix of offshore and onshore resources?**

Answer: We are not opposed to using offshore resources but for contracting purposes, they should be the subcontractor to a prime contractor within the United States. Subcontractors may also be subject to flow-down contractual requirements for insurance and data security.

- 7. Work will be onsite or remote?**

Answer: Work on this project can be completed remotely.

- 8. Can you please give us an extension of 1-2 weeks to submit our proposal?**

Answer: Proposals are due with a firm deadline of 5pm PPT on July 9th, 2025.

- 9. To help us tailor our proposal effectively, could you please provide a budget range or estimate for this project?**

Answer: See answer to question 2.

10. We didn't see a budget in your RFP for Database Development Services. Is that something that you can provide?

Answer: See answer to question 2.

a. Do you have a budget for the Required Database Functions scope and a budget for the Desired Database Functions scope?

Answer: No, we have not separated the budget for those two scopes.

11. Do you intend to "own" the solution? For instance, would you pay for Salesforce production and development environments, licenses, storage—and we would build your solution on this infrastructure or are you expecting us to purchase infrastructure for you?

Answer: We would consider either option.

a. As a corollary to the above question, would we need to build a data lake for you or would we need to develop an API (or other connection) to a data lake that you develop and maintain?

Answer: The developer would likely need to build a data lake for us. We currently do not have one set up but that could change in the future.

12. When you say meter location, do you mean maintain a meter number in the database or something more sophisticated like grid telemetry?

Answer: We mean maintain a meter number and latitude and longitude in the database that can be used for mapping. We do not mean grid telemetry.

13. Do you anticipate that analytical tools need to be incorporated?

Answer: Analytical tools would be a desired functionality but are not required.

14. When you say, "customer energy usage", what level do you mean—monthly, hourly, sub-hourly?

Answer: If your tool will be able to cover the following types of energy data, please propose solutions for any of the following possibilities:

- *15-min increment data for one year per customer (approximately 1M customers).*
- *1-hour increment date for one year per customer.*
- *Monthly energy usage for one year per customer.*
- *Total annual energy usage for one year per customer.*

15. What measure data do you need imported (from CAeTRM)? How many fields, how often?

Answer: RCEA would like to import measure data from all of our selected measures for all climate zones within NREN region (1,2,11,12 and 16). To create CET files for our measures, we will need most fields updated at least quarterly.

16. What data do you need imported from the Calculator? How many fields, how often?

Answer: This is to-be-determined, but approximately 10 fields from a spreadsheet calculator. This is a desired function and not a required one.

17. Should we provide a proposal for just the Required Database Functions scope, and then hourly rates for the Desired Database Functions scope? Or provide a level of effort for that too?

Answer: If the Desired Database Functions can be included in the proposal, then a level of effort should be provided for that scope.

- 18. Is it mandatory for a vendor to have specific experience working with energy programs, and specifically CPUC ratepayer funded programs? Or will relevant commercial experience suffice?**
Answer: It is not mandatory to have specific experience working with energy programs; however, this is a desirable quality for the proposer. Please give examples of any relevant commercial experience and how it is similar to working with energy programs so we can use this information to rate your proposal.
- 19. We would appreciate your guidance on the data security and compliance requirements listed in the RFP, such as SOC 2 Type 2, ISO-27000 series, NIST-SP 800-53, or FedRAMP. In the event a vendor does not currently hold one or more of these certifications, could you please advise on what supporting documentation or alternative attestations would be acceptable to meet the intent of these requirements?**
Answer: This database must meet CPUC requirements for data security and therefore the proposer must hold at least one of these certifications or be able to acquire one.
- 20. Is there a set-aside budget allocated for the project?**
Answer: See answer to question 2.
- 21. Are there any incumbents on the project?**
Answer: Yes, we currently use a Salesforce-based solution and will want to migrate the data from the existing database into the new database.
- 22. Is a California business license required at the time of submission or post-award?**
Answer: No.
- 23. Is the COI required at the time of submission or prior to commencing work?**
Answer: The COI will be required prior to commencing work.
- 24. Could you please give more details on what are the Programs/Products and Projects in the context of the required solution?**
Answer: The Programs will be both residential and non-residential energy efficiency and electrification programs. The projects will be energy efficiency and electrification projects with associated installed measures that will have savings values from either CA eTRM workpapers or calculations that will be done externally to the database. There will also be projects with no measures where only services are provided such as assessments and reports.
- 25. Could you give a brief description of the most common workflows that should be available for DB users?**
Answer: The most common workflow used in our existing database is the assignment of a project status based on milestone dates entered or data connected to the project.
- 26. Who are our main users? Should anyone aside from RCEA employees have access to the DB?**
Answer: The main users will be employees of NREN partner agencies including RCEA, SBC, LAPC, and MCOG. Those users will all have limited access to each other's data, while RCEA administrative staff will have access to all data.
- 27. Why is the integration with Monday.com required? What data should be transferred in and out?**
Answer: Integration for Monday.com is desired but not required. NREN staff currently use Monday.com for task management and approvals. Data such as task statuses and key dates should be able to be transferred in and out.

- 28. What internal customer and staff roles are needed here and what permissions might be needed for them?**
Answer: Customers will not need access, however, there will be implementation staff that primarily do data entry or manage projects using the database, program managers that will need to be able to run reports and access data for their region, as well as administrative staff that will need access to all data and the ability to run reports on everything with no restrictions. Administrative staff will also need the ability to modify fields or workflows.
- 29. Will RCEA provide access to existing stakeholders for user acceptance testing?**
Answer: Yes, RCEA will provide access to existing stakeholders for UAT.
- 30. Will we get regular feedback or checkpoints during development?**
Answer: Yes, the database team will check in regularly, likely weekly at the beginning stages of the project.
- 31. Will we have a main technical point of contact at RCEA during the project?**
Answer: Yes, there will be a main technical point of contact at RCEA for the project.
- 32. What's the biggest pain point you've faced with previous systems or tools?**
Answer: The biggest pain point we've faced in previous systems or tools is the inability to modify the tools ourselves. The developers' staff often do not understand the programs well enough to be able to make the changes quickly in a way that served the programs well.
- 33. How do you prefer training to be done, video tutorials, live sessions, or documents?**
Answer: Live sessions are preferred, with videos and documents to refer to.
- 34. What's more important, speed of delivery or customization flexibility?**
Answer: Both are important for different reasons. Please indicate in your proposal how your solution will meet both these needs.
- 35. Is there flexibility to propose an accelerated timeline if milestones are front-loaded?**
Answer: Yes.
- 36. Can you clarify if the final product acceptance requires CPUC signoff or only RCEA's?**
Answer: The final product acceptance only requires RCEA sign off.
- 37. Can you clarify if users from other regional agencies (outside RCEA) will require direct access?**
Answer: See answer to question 26.
- 38. What is the expected contract term for ongoing support (annual renewal or multi-year)?**
Answer: Ongoing support will initially be contracted through the end of the program cycle in 2027. After that, support will be renewed on an annual basis pending continuation of funding for programs. A multi-year support contract could be negotiated at that time.
- 39. Will the support package be handled on a fixed-price, T&M, or subscription basis?**
Answer: Please propose the solution that you can offer, NREN is open to any of the above options.
- 40. Does RCEA envision entering into a multi-year support and maintenance agreement post-finalization?**
Answer: See question 38.
- 41. Is there a preference for open-source technologies or proprietary platforms for the database?**
Answer: There is no preference.

- 42. Can you clarify if there's a preferred tech stack or hosting environment (e.g., AWS, Azure, on-prem)?**
Answer: There is no preference; however, RCEA currently uses Azure and an environment with security equivalence is desired.
- 43. Are there performance benchmarks expected (e.g., load time, concurrent users)?**
Answer: These performance benchmarks can be discussed during the discovery phase and have not been set.
- 44. What APIs or data formats are required for integrating with external reporting tools or CPUC interfaces?**
*Answer: Current CPUC reporting requires data exported in CSV (bar delimited) or Excel workbook format, depending on the report. An API may be required to import data from CA eTRM. The requirements for that API can be found at the eTRM User Guide:
<https://static1.squarespace.com/static/53c96e16e4b003bdba4f4fee/t/6126b6b312628d3452f45282/1629927092567/eTRM+User+Guide+for+Base+Users+v2.2+2021.08.25.pdf>*
- 45. Does RCEA require encryption at rest and in transit? If so, what level (AES-256, TLS 1.2+)?**
Answer: Yes, the minimum encryption is AES-256 and TLS 1.2+.
- 46. Will RCEA perform its own security audits, or is third-party audit evidence sufficient?**
Answer: RCEA will require the developer to provide attestation of internal or external 3rd party annual security audits of provider. However, RCEA also reserves the right to perform its own internal and external third-party security audits of the product.
- 47. Are FedRAMP or California-specific data hosting requirements applicable?**
Answer: No. However, data should not reside outside of the United States.
- 48. Can you share sample CPUC reporting templates to guide schema design?**
Answer: See <https://cedars.cpuc.ca.gov/claims/specification/> to see a quarterly claims template and user guide.
- 49. Will historical data from legacy systems be provided in a clean format, or will data cleansing be required during migration?**
Answer: Historical data may require data cleansing.
- 50. Are there any automated tools currently in use for CPUC reporting?**
Answer: Our current salesforce database outputs reporting data in CSV format but requires data manipulations to be put into the CPUC reports. Some of the data manipulation is done through Python code.
- 51. Will we need to provide data validation pipelines to ensure reporting accuracy?**
Answer: Yes, data validation is preferred.
- 52. How often do data extracts for CPUC need to be generated (monthly, quarterly, annually)?**
Answer: Data is extracted, monthly, quarterly and annually for CPUC reports.
- 53. What is the preferred duration or structure for the "implementation sprints"? (e.g., 2-week Scrum)**
Answer: 2 weeks is preferred but RCEA is open to other proposed durations and structures.
- 54. Are there standardized testing requirements (e.g., OWASP, ADA 508 compliance)?**
Answer: No.

55. Will the agency provide performance/acceptance benchmarks (e.g., bug tolerance %)?

Answer: See question 43.

56. Can you clarify the expected duration of the stabilization period in Phase 3?

Answer: The stabilization period for the database does not have an expected duration and will depend on the complexity of the database testing.

57. Will the system need to integrate with PG&E, GoGreen, or PACE platforms directly?

Answer: No, but if your system can integrate with any of these platforms, please include this in the proposal, as this would be desirable but not required.

58. Is Monday.com integration limited to status syncing, or should it support bi-directional workflows?

Answer: Ideally, the workflows would be bi-directional, but RCEA would be open to just data syncing.

59. Are there APIs currently available for external tool integrations (e.g., CAeTRM)?

Answer: See question 44.

60. Should the solution support SSO or integrate with RCEA's identity provider?

Answer: RCEA's preference is SAML SSO/Federation with RCEA's identity provider Microsoft Entra, though not required.

61. What existing database systems (if any) are currently used by RCEA or partners?

Answer: RCEA currently uses a Salesforce-based custom database.

62. Will we get access to any sample datasets for testing or demonstration?

Answer: Yes, we can provide sample datasets for testing or demonstration.

63. How many total users (and user types) will be using the system?

Answer: Approximately 30 regular users and 5 admin users. Regular users will have data entry access but may be barred from viewing certain records, admin users will be able to query data out of the database and potentially make changes to the front-end user interface or add fields. There may be the occasional need for a read only user from the customer service departments.

64. Are there any other tools or platforms this system needs to connect with?

Answer: Not at this time.

65. What is the preferred format for the final archived database at program closeout?

Answer: The final archived database could be CSV tables. Please propose other solutions.

66. Can RCEA clarify whether it prefers a custom-built solution versus adapting to a prebuilt product?

Answer: RCEA will consider both options.

67. Are there any incumbent vendors currently providing partial database or CRM support for the NREN program?

Answer: See answer to question 21.

68. Does RCEA expect a single unified platform for all NREN programs, or can modular solutions per program be proposed?

Answer: Modular solutions can be proposed.

69. Approximately how many internal users will have admin-level access versus basic user access?

Answer: See question 63.

70. Will NREN stakeholders from outside RCEA (e.g., partner agencies, counties) need user accounts or access rights?

Answer: See answer to question 26.

71. Will RCEA require vendor assistance in CPUC audits or data validation during program review?

Answer: No.

72. Is there a chance new programs will be added later that the database should handle?

Answer: Yes.

73. Is there any plan to grow or scale the system beyond the current scope?

Answer: Yes.

74. Are we allowed to use team members outside the United States?

Answer: Yes.

75. Is remote work permitted? Will any work need to be done onsite?

Answer: See answer to question 7.

76. What's driving the (mid-January, Feb 6) timeline?

Answer: Our existing database will have user licenses expiring in mid-2026 and it is desired that there is some overlap between the two systems before migrating completely into the new one.

77. Phase 1 will identify the specific requirements to be implemented in Phase 2. Given that the scope of Phase 2 is uncertain until Phase 1 is complete, is RCEA open to a phased rollout if necessary?

Answer: Yes.

78. The RFP states: "Provider will migrate the data from existing databases into the new database, if required."

a. Roughly how much data do the existing databases currently contain?

Answer: This volume is currently unknown, however, as a comparison from RCEA's incumbent tool, there are currently 2200+ project records, 113,000+ service agreements, 101,000+ measures, 2700+ sites and a similar number of contacts. Lake and Mendocino Counties have similar population sizes and could have similar or smaller record counts. The Sierra Counties are more populous, but their program staff size compares RCEA's and could have similar record counts. Counting all of this, it could mean a quadrupling of the size of data records compared to the existing tool.

b. How many separate databases are there? Assuming they are relational, approximately how many tables are there?

Answer: See above answer 78a.

79. Is the data migration a one-time process or will there be on-going updates?

Answer: The data migration from the previous database will be a one-time process.

80. Does RCEA have a preference between cloud and on-prem deployment?

Answer: No.

- 81. The RFP is for “Database Development Services”, but the application will need user interfaces for data entry and reporting. Will the Provider be creating the full application or will RCEA developers be implementing the front end?**
Answer: The Provider will be creating the full application.
- 82. What user roles will the application have? Will some users be filling in forms to create data and others are running reports? (Read access vs edit; levels of access)**
Answer: See answer to question 28 or 63.
- 83. How many concurrent users should the system be able to support?**
Answer: See answer to question 63.
- 84. Will users be authenticated through an external system (LDAP, SAML, OAuth2, etc.) or will users be maintained in the system?**
Answer: See answer to question 60.
- 85. Attachment 2 item 4.a. says, “Export data in format needed for CPUC reporting.” Please describe the format (for example, CSV, JSON, XML).**
Answer: CSV or XLSX.
- 86. What database systems, tools, or platforms are currently in use (if any) to manage program or customer data?**
Answer: See answer to question 61.
- 87. Is there an existing legacy database that we will need to migrate data from? If so, what is the platform, and how many records/fields are involved?**
Answer: See question 61 and 78.
- 88. What format is the existing data in (e.g., SQL, Excel, Access, Salesforce, proprietary systems)?**
Answer: Salesforce.
- 89. Are there any existing integrations with external systems (e.g., utility APIs, CAeTRM, Monday.com, Power BI)?**
Answer: See answer to question 59.
- 90. Are there any system constraints or internal IT policies that would limit cloud hosting or third-party SaaS tools?**
Answer: Cloud platforms and SaaS tools must meet minimum industry-standard security requirements for customer PII data; for example, ISO-2700x, or SOC 2 Type II.
- 91. Does RCEA have a preferred cloud provider (e.g., AWS, Azure, Google Cloud) for hosting the database solution?**
Answer: See answer to question 42.
- a. Are you open to a different cloud provider? Are you currently experiencing an excessive amount of database crashes?**
Answer: No, we are not experiencing excessive amounts of database crashes with our current system.

- 92. What authentication protocols or identity providers (e.g., SSO, LDAP, Okta) are currently used for user access management?**
Answer: See answer to question 60.
- 93. Can you clarify the volume and type of Personally Identifiable Information (PII) the system will handle?**
Answer: See answer to question 78.
- 94. Are there specific encryption or data handling protocols (in transit and at rest) that the solution must adhere to beyond the stated ISO/NIST/SOC standards?**
Answer: See answer to question 45.
- 95. Will access need to be tiered across RCEA and the other three NREN partners? If so, how many users per partner are expected?**
Answer: Yes, access will be across all three partners. Sierra Business Council will have approximately 11 users, Lake Area Planning Council will have 3, Mendocino Council of Governments will have 3 and RCEA will have 15.
- 96. Can you clarify if CPUC reporting formats are standardized templates or if custom report-building will be required?**
Answer: See answer to question 48.
- 97. Should the database support program budgeting and invoicing, or will financials be tracked in a separate system?**
Answer: This is not a required function, but if your proposed database can provide this functionality, we would be open to it. Currently financials are tracked outside of our program database.
- 98. Will any workflows or approval processes (e.g., customer intake → eligibility check → project initiation) need to be automated?**
Answer: Yes, this is a desired but not required function for certain eligibility checks could be automated.
- 99. Do you require offline or mobile-first access for field staff collecting site data?**
Answer: To have offline or mobile access to some functionality of the database or ability to sync data at a later time are desired but not required functions.
- 100. How frequently are CPUC reports generated (monthly, quarterly, etc.) and submitted?**
Answer: See answer to question 52.
- 101. What are the typical data volumes or record counts expected annually (e.g., of projects, workshops, customers)?**
Answer: See answer to question 78.
- 102. Do you expect the system to support versioning or audit trails for data updates, especially customer records or reports?**
Answer: Yes.
- 103. Will RCEA designate dedicated system administrators to be trained for ongoing updates and configuration?**
Answer: See answer to question 31.
- 104. How many administrative users do you anticipate needing elevated permissions (e.g., manage users, modify fields)?**

Answer: See answer to question 63.

105. Do you have any preferences between perpetual licensing, annual SaaS subscriptions, or time-bound custom development contracts?

Answer: RCEA is open to perpetual licensing, annual SaaS subscriptions, or time-bound custom development structures. If the respondent can offer the same product under more than one structure, please clearly indicate the different costs in separate cost proposal pricing.

106. Should cost proposals include multi-year pricing scenarios, or only the base period through 2027?

Answer: Cost proposals should only be through 2027 as funding beyond that is not guaranteed.

107. Do you anticipate adding modules or functionalities in future years (e.g., document generation, CRM campaigns, field app)?

Answer: Yes.

108. Is Monday.com currently in use by any NREN partners, or is integration noted as a future preference only?

Answer: Monday.com is currently in use by all NREN partner agencies.

109. Is there an interest in integrating AI tools for insights, predictive analytics, or automated reporting in later phases?

Answer: There is interest, but this is currently not listed as a desired or required functionality.

110. Does RCEA have a preference between Commercial Off-the-Shelf (COTS) solutions with configuration or a fully custom-built database platform for this engagement?

Answer: See answer to question 66.

111. Who is the incumbent vendor and are they currently managing or supporting the existing database systems, if any?

Answer: See answer to question 21. The incumbent vendor is currently supporting the existing database systems.

112. Is the incumbent vendor allowed to participate in this bid?

Answer: Yes.

113. What are the primary pain points or challenges with the current database systems and processes that led to the issuance of this RFP?

Answer: See answer to question 32.

114. What is the database platform currently being used for NREN program tracking and reporting?

Answer: See answer to question 61.

115. Do you have any preferences in terms of technology?

Answer: See answer to question 42.

116. Can you please provide the list of data systems along with their type and size.

Answer: See answer to question 78.

117. Could you please identify the primary data sources for program tracking and reporting that will need to be integrated into the new database.

Answer: See answer to question 61.

118. Who will be responsible for hosting the database platform?

Answer: Please propose your solution for hosting, RCEA is open to options.

119. What is the hosting preference – Cloud vs On-prem?

Answer: See answer to question 42 or 80.

120. Are there any specific business intelligence (BI) tools or reporting platforms that RCEA currently uses or prefers for integration with the new database?

Answer: See answer to question 59.

121. Will RCEA provide access to data dictionaries and export tools for existing systems?

Answer: Yes.

122. What is the current system/platform used for data tracking and reporting (Excel, Access, Salesforce, etc.)?

Answer: See answer to question 61.

123. How many users do you have? Please provide the internal and external users who utilize this system.

Answer: See answer to question 26 or 63.

124. Who are the primary stakeholders collaborating with the vendor, and what are their roles?

Answer: The primary collaborators from RCEA will be the Portfolio Manager, responsible for compliance and reporting, and RCEA's Analyst, responsible for data tracking, analysis, and reporting. There will be other program managers that will also participate as the tool is built out to support more of the program side.

125. Will RCEA require real-time dashboards in addition to exportable data reports?

Answer: This is a desired but not required functionality.

126. Do you expect the vendor to perform data cleansing activities?

Answer: See answer to question 49.

127. What is the anticipated volume of data to be migrated from each existing database, and what is the expected growth rate of this data over the next 1-3 years?

Answer: See answer to question 78.

128. What are the expectations and timeline for ongoing support and maintenance after the system implemented?

Answer: See answer to question 40.

129. Do you expect the vendor to perform any tasks on-site, or can all work be performed remotely?

Answer: See answer to question 7.

130. Do you accept off-shore resources?

Answer: See answer to question 6.

131. What is the approved budget or range allocated for this project?

See answer to question 2.

132. Can RCEA provide a list of the Measures expected to be sourced from the CA eTRM?

Answer: See answer to question 15.

133. Can RCEA provide any project workflow documentation to help respondents understand the project lifecycle and application statuses?

Answer: See answer to question 25.

134. Does RCEA have an existing site assessment tool or platform in use or planned?

Answer: No.

135. Below is a table based on our understanding of NREN programs. Would it be possible to update table to clarify detail:

a. Is this a 3rd Party Managed Program with required data import?

Answer: No.

i. Recurring Schedule of import? Daily/ Weekly

Answer: N/A

b. Non NREN programs to be implemented specific to RCEA?

Answer: Currently there are no non-REN programs to be included in the development of the database. If additional programs will be supported, then an addendum will be issued in the future.

c. Please describe if you see each NREN having a separate program in Solution proposed or measures specific to Supported NREN Partner?

Answer: No.

d. Will Workforce and Codes/ Standards be included in Phase 1 or they still under development?

Answer: This program is still under development.

NREN Programs	Include in Response?	3 rd Party Managed/Import	Managed by NREN	Supported NREN partners
Residential RA	Yes		X	SBC, Mendocino COG, Lake Area PC and RCEA
Residential Equity	Yes		X	SBC, Mendocino COG, Lake Area PC and RCEA
Commercial RA	Yes		X	SBC, Mendocino COG, Lake Area PC and RCEA
Finance Program	Yes		X	SBC, Mendocino COG, Lake Area PC and RCEA
Public Equity	Yes		X	Mendocino COG Lake Area PC
Codes and Standards	Yes		X	SBC, Mendocino COG, Lake Area PC and RCEA
Workforce, Education and Training	Yes		X	SBC, Mendocino COG, Lake Area PC and RCEA
List Other Non NREN Programs	N/A	Will Import be required?	Managed by RCEA?	

136. Number of users per NREN Partner with type of permission set? (Read/only etc.)

Answer:

- a. **SBC** Could have 10-11 users with mostly data entry only and access to customer data. 1-3 users will also have the ability to query data out of the database.
- b. **Lake APC** Could have 2-3 users with mostly data entry only and access to customer data. 1 user will also have the ability to query data out of the database.
- c. **Mendocino COG** Could have 2-3 users with mostly data entry only and access to customer data. 1 user will also have the ability to query data out of the database.
- d. **RCEA** Could have 12-15 users with mostly data entry only and access to customer data. 2-5 users will also have the ability to query data out of the database.

137. Please describe any integration required as part of RFP Response.

- a. **One-way/bi-directional integration?**

Answer: The current integration used is Forms for Salesforce and Documents by Formstack. The data is bi-directional.

- b. **API or other**

Answer: See answer to question 44.

138. Would you be willing to extend due date of RFP to July 11th due to Holiday week prior week?

Answer: No. See answer to question 8.

139. How committed is RCEA to a contract award date by August 28 because this would enable us to allocate resources in advance for a Fall implementation? Kindly note that any delays in contract award date may push an implementation start date to Jan 01 given ongoing project commitments. Would RCEA be amicable to starting implementation on Jan 01 if the contract award date is delayed?

Answer: RCEA is committed to the award date of August 28. RCEA's preference is not to wait until January 1 to begin database development.

140. Phase 2.3 addresses data migration, stating, "Provider will migrate the data from existing databases into the new database, if required."

- a. **How many sources do we need to migrate from?**

Answer: See answer to question 78.

- b. **What is the size of each database?**

Answer: See answer to question 78.

- c. **Do we need to migrate all the records, only the active ones, or only those from a certain onward?**

Answer: Only active records will need to be migrated.

- d. **Is this a one-time migration, or do we need to synchronize at a certain frequency?**

Answer: See answer to question 79.

141. On the Desired Database Functions, item 3.c addresses "Calculate energy savings". Can you provide an example of these calculations?

- a. **Do we need to perform the calculations or simply keep a record of the energy savings?**

Answer: This is a desired but not required

- b. **If we need to do the calculations, can you provide an example of these calculations?**

Answer: Life cycle energy savings calculations may be required. An example of such a calculation is included below.

sum (

case when Measure.RUL_YRS > 0 then Measure.RUL_YRS

else Measure.EUL_YRS end

** case when Measure.DeliveryType = 'C&S' then Measure.NTGRkW else 1 end*

** Measure.NumUnits*

** Measure.InstallationRatekW*

** Measure.RealizationRatekW*

** Measure.UnitkW1stBaseline*

+

*case when Measure.RUL_YRS > 0 then Measure.EUL_YRS - Measure.RUL_YRS
else 0 end*

** case when Measure.DeliveryType = 'C&S' then Measure.NTGRkW else 1 end*

** Measure.NumUnits*

** Measure.InstallationRatekW*

** Measure.RealizationRatekW*

** Measure.UnitkW2ndBaseline*

) as Claim.TotalLifecycleGrosskW,

- 142. How many accounts, sites, and customer contacts do you currently have?**

Answer: See answer to question 78.

- 143. How many distinct staff will be using each of the following database functions? Please specify how many users will utilize more than one of the following database functions, and which functions they will use?**

Answer: There will be between 1-30 database users and it is not entirely clear at this time how many users will use each of the following functions. Assume approximately 10 users.

- a. **Required Database Functions, item 2.a "Customer program participation (NREN programs)"**

Answer: See above.

- b. **Required Database Functions, item 2.b "Customer workshop attendance"**

Answer: See above.

- c. **Required Database Functions, item 2.c "Referrals to external third-party program implementers"**

Answer: See above.

- d. **Required Database Functions, item 3 "Project Management"**

Answer: See above.

- e. **Desired Database Functions, item 1.c.i "Customer Contact Information: Calls/Interactions". Meaning, how many agents call/interact with customers?**

Answer: See above.

f. Desired Database Functions, item 2.a "Customer service interactions"

Answer: See above.

g. Desired Database Functions, item 2.b "Support customer marketing/outreach tracking"

Answer: See above.

h. Reporting

Answer: 1-5 users.

144. Are there any users who need only read access that is different from reporting?

Answer: See answer to question 63.

145. Any major projects planned in coming years which vendors should be aware of?

Answer: There will be another application for program funding upcoming in early 2026 that will potentially secure funding for the 2028-2031 program cycle.

146. Is this a new RFP or are there any incumbents?

Answer: See answer to question 21.

a. And if there are incumbents, can we have the names and if possible, a copy of their past contract?

Answer: No, RCEA will not be sharing these details at this time.

147. What are the primary business drivers for issuing this RFP?

Answer: The establishment of NREN brings together 4 agencies that provide energy efficiency program services to 17 total counties and will need a database with associated capability to administer our 7 programs.

148. Can we please have details regarding the IT/System landscape?

Answer: Hybrid on-prem of Microsoft Hyper-V/Microsoft 365.

149. Can you please share the current support team structure for IT support?

Answer: RCEA's current structure is as follows: data security officer, data security team, in-house IT technician, MSP.

150. What existing database systems are currently in use that the new system will need to migrate data from?

Answer: See answer to question 78.

151. Can you describe the format, volume, and current hosting of the existing data (e.g., number of records, customers, and projects)?

Answer: See answer to question 127.

152. Will data mapping and cleansing of legacy systems be the vendor's responsibility, or will RCEA handle this internally?

Answer: See answer to question 49.

153. Please identify all systems requiring inbound or outbound integration, including data format, exchange frequency, and preferred integration method (e.g., API, CSV, messaging).

Answer: See answer to question 137.

154. Is there a preferred cloud platform for deployment (e.g., AWS, Azure, Google Cloud)?

Answer: See answer to question 42.

155. What are the expected peak concurrent user loads the system should be designed to support?

Answer: See answer to question 63 and 78.

156. Is there an anticipated budget range for this project?

Answer: See answer to question 2.

157. Are there separate budget allocations for initial development versus ongoing support and maintenance?

Answer: See answer to question 40.

158. To optimize both cost and delivery efficiency, would RCEA consider a hybrid team model involving onshore project leadership and offshore development resources, all coordinated under a unified project plan?

Answer: See answer to question 6.

159. Are there specific legacy systems or software that the new database must integrate with (e.g., reporting tools, CRM, or utility tracking systems)?

Answer: See answer to question 87.

160. What is the current applications in front-end?

Answer: Salesforce.

161. What is the existing database (size , schema etc..)?

Answer: See answer to question 61.

162. Do you have a preferred technology stack (e.g., SQL-based, cloud-hosted, open-source), or are all architectures open for consideration?

Answer: See answer to questions 41 and 42.

163. Can you provide more detail on the number and types of user roles that will access the system, and any specific role-based permission requirements?

Answer: See answer to questions 28 and 63.

164. How should the system manage data segregation and access control for the four NREN partners?

Answer: See answer to question 26.

165. Are there specific regulatory or CPUC reporting formats the system must support?

Answer: See answer to question 48.

166. What compliance standards or data retention policies must the solution adhere to?

Answer: Because RCEA is a public agency, there will be retention policies on customer data. Currently those are primarily that customer data will not be held beyond 10 years and will need to be scrubbed from the database. The CPUC also requires project data to be retained for 5 years.

167. Will the awarded vendor be responsible for migrating legacy data? If so, what is the volume and format of the data?

Answer: See answer to question 78.

168. Should the solution be hosted on-premises, in the cloud, or is a hybrid model acceptable?

Answer: See answer to question 80.

169. What are your expectations for user training, documentation, and post-deployment support

Answer: See answers to questions 33 and 40.

170. Does RCEA have a preferred subject line for the proposal submission email and for the submitted documents?

Answer: RCEA does not have a preference, however listing the name of the RFP and your company name would be helpful.

171. In case firms are submitting confidential information in the response, is it required to provide a redacted version?

Answer: It is not required, however RCEA may reach out for a redacted version if a firm is awarded the contract.

172. Is there any women, minority, disabled veteran, persons with disabilities, and LGBT business enterprise's goal for this solicitation? If yes, what is the established goal?

Answer: There is no goal for this solicitation, however, the CPUC does track that RCEA as a CCA does attempt to seek out such enterprises through the diversity supplier clearinghouse.

173. Could RCEA please confirm the link to find a directory for women, minority, disabled veteran, persons with disabilities, and LGBT business enterprises companies?

*Answer: The Supplier Clearinghouse certifies businesses in accordance with CPUC's GO 156.
<https://thesupplierclearinghouse.com/>*

174. Could RCEA please clarify the certification that subcontractors need to have in order to comply with the goal for this solicitation?

Answer: See answer to question 173.

175. If vendors are unable to meet the established goal, can they present a Good Faith Effort? If so, how should vendors present it?

Answer: RCEA is unfamiliar with the meaning of a Good Faith Effort for meeting the establish goal.

176. Can a firm subcontract with various primes?

Answer: Yes.

177. Can a firm bid both as a prime contractor and as a subcontractor?

Answer: Yes.

178. Are commercial references allowed?

Answer: Yes.

179. Are references from ongoing contracts accepted?

Answer: Yes.

180. Could RCEA please clarify if firms can utilize subcontractors to meet the requirements of this opportunity?

Answer: Yes. Primes must fill out the subcontractor form and attach it to their proposal.

181. Could RCEA please clarify if subcontractor references are allowed to be used for the services provided?

Answer: Yes.

182. Is the License to do Business in the State of California required with the proposal response?

Answer: See answer to question 22.

183. Under section is stated "Proposer Licensing Requirements. If applicable, all Proposers and proposed subcontractors must be properly licensed in accordance with California Business and Professions Code and local law.", and in EXHIBIT A - FIRM'S BUSINESS INFORMATION "List types and business license number(s) (if applicable)". Could RCEA please confirm what are the required licenses for this solicitation?

Answer: No license is required for this solicitation; however, certain certifications may be required.

184. In case vendors are in the process of obtaining the required licenses could they add proof that they are in the process of obtaining it?

Answer: Yes.

185. Is the certificate of Insurance required with the response?

Answer: See answer to question 23.

186. Are electronic signatures allowed?

Answer: Yes.

187. Is there any incumbent to this solicitation? If yes, could RCEA please provide the information?

Answer: See answer to question 21.

188. Could RCEA please clarify if vendors should attach Exhibit C to the proposal response? If yes, in what section should vendors include it?

Answer: No, Exhibit C is not required to be attached to the proposal unless the vendor is proposing redlines to the Agreement. This can be attached as Section E.

189. Does RCEA accept remote resources to work on this engagement?

Answer: See answer to question 7.

190. Does RCEA accept offshore resources to work on this engagement?

Answer: See answer to question 6.

191. Does RCEA prefer on-site resources to execute this engagement?

Answer: No.

192. If the resources, we provide at the time of proposal submission are not available at the time of a potential contract award could vendors replace them with equally qualified resources?

Answer: Yes, however, depending on the magnitude of the change, the project may need to be re-solicited.

193. Could RCEA please confirm what is the suggested font size and type for the proposal?

Answer: There is no required font size, however, it is suggested that proposers use something similar in size to 11 pt Calibri to ensure readability of the proposal.

194. Could RCEA please grant an extension on the due date?

Answer: See answer to question 8.

- 195. Could RCEA please confirm if firms can showcase their experience in implementation and development instead of experience in selling their product?**
Answer: Yes, selected proposers will have an opportunity to showcase their products and experience in implementation and development.
- 196. Is it mandatory for vendors to provide references based on their product or can they provide references where they have provided develop/implementation services?**
Answer: Yes, vendors can provide references for development and implementation services.
- 197. Can RCEA clarify the type and structure of the existing databases that need to be assessed or integrated (Phase 1.2 and 2.3)? Are they cloud-hosted, on-prem, Excel-based, or another system?**
Answer: See answer to question 61.
- 198. Will RCEA provide access to sample or sanitized data schemas from the current systems during the proposal phase?**
Answer: No.
- 199. How many user roles (admin, data entry, viewer, etc.) should the database support initially?**
Answer: See answer to question 28 or 63.
- 200. Is there a preferred or required cloud platform (e.g., AWS GovCloud, Azure Government, or GCP) for hosting the solution that aligns with ISO 27001 or SOC 2 Type 2 compliance?**
Answer: See answer to question 42.
- 201. Does RCEA require FedRAMP authorization if proposing a cloud-hosted solution?**
Answer: See answer to question 19.
- 202. Will RCEA provide predefined report formats or templates for CPUC or internal reporting?**
Answer: See answer to question 48.
- 203. Are there specific file formats and data schemas required for CPUC regulatory submissions?**
Answer: Yes, CPUC regulatory submissions are in CSV format.
- 204. Can RCEA provide an estimate of the initial data volume (e.g., number of records, size in GBs) and anticipated growth over the next 3-5 years?**
Answer: See answer to question 78.
- 205. Are there any mandatory third-party tools the proposed system must integrate with (e.g., PG&E data, GoGreen Financing API, California eTRM, Monday.com)?**
Answer: See answer to question 57.
- 206. Regarding the desired integration with Monday.com, can you elaborate on what functionalities should be integrated? (e.g., task sync, timeline updates, program tracking?)**
Answer: See answer to question 27.
- 207. One of the desired features is tablet/mobile data entry. Will the system need to support offline functionality in rural areas with limited connectivity?**
Answer: See answer to question 99.

208. Does RCEA have any preferences or restrictions regarding the technology stack (e.g., open-source vs. commercial platforms, programming languages, databases)?

Answer: See answer to question 42.

209. For cloud or SaaS solutions, does RCEA prefer a perpetual license, annual subscription, or usage-based pricing model?

Answer: See answer to question 105.

210. If a pre-built SaaS solution is proposed, would RCEA prefer the option to own and host the database internally after development, or will they consider ongoing vendor-hosted models only?

Answer: See answer to question 11.

211. Is there any specific tool preferred for generation customer report?

Answer: No, however, reports should ideally be generated in MS Word format for ease of editing.

212. Please describe the provider's expertise, recent (within the past two years) related experience related to the Scope of Services. Can RCEA increase this limit to five years?

Answer: No.

213. Any specific experience working with energy programs, and specifically CPUC ratepayer funded programs'- Is this a mandatory requirement?

Answer: See answer to question 18.

214. For references, can firms provide references from clients where we have delivered data solutions instead of pre-existing product?

Answer: Yes.

215. To fulfill the recent references criteria, can firms provide references from ongoing contracts?

Answer: Yes.

216. Are firms required to provide a separate response for the evaluation criteria?

Answer: No, firms are not required to provide a response to the evaluation criteria.

217. Is there a page limit for the rest of the response apart from 4-page limit of cover letter?

Answer: There is no page limit aside from the length of the cover letter.