City of Richmond

May 22nd, 2014
File:

Finance and Corporate Services Department
Finance Division
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Attention: To All Proponents
Re: 5192P – Provision of Program Management Services for the Richmond Energy Challenge – Addendum #2

This Addendum includes items of clarification; forms part of the Documents and shall be read, interpreted and coordinated with all other parts. Please review and consider the following information in the preparation of your Proposals:

Questions and Answers:

1) Does the City of Richmond require that training modules and workshops are held for all business/building types together? Or are training modules and workshops to be delivered separately into e.g. small vs. large, different business types

Answer: The City does not require that training modules and workshops be delivered for all participants together. We recognize that there may be value in convening two or more different cohorts for training, representing different participant types (e.g. sector; large vs. Small; more or less experience with energy management etc.). We anticipate that appropriate participant cohorts can be identified with the consultant once more participants are recruited.

2) Who will conduct the energy assessment? Who is responsible for the cost of the energy assessor? (See Addendum #1 – Appendix Two – Energy Assessment & Upgrade Implementation – "Participants receive energy assessments")

Answer: The City anticipates that participants can take advantage of utility programs that provide energy assessments at subsidized costs. Under this model, participants are responsible for costs. Assessments will be performed by firms designated via these programs. The City recognizes that assessment programs may not cover all building types; the City may explore supporting assessments for under-served sectors.

3) Is there a deadline for implementing ECMs? Or are ECMs allowed to be implemented anytime during the benchmarking performance period?

Answer: Anytime during the period.

4) What is the tentative dead line for submitting EnergyStar Portfolio Manager database by the participants for the energy competition? What year ending data are going to be considered as reference/baseline year to estimate greatest energy intensity reductions?

Answer: The City anticipates September 1 2014 – September 1 2015 as the dates over which reductions will be measured. The reference year would be September 1 2013 – August 31 2014. Tentatively, the Challenge would aim to have all buildings benchmarked in Portfolio Manager by December 1, 2014; buildings entering data at later dates would be accepted, however.

5) What are the threshold square-foot (ft^2) of gross floor area of buildings to distinguish smaller, medium and larger facilities for different building types e.g., commercial (e.g., office), institutional, multi-family buildings, institutional and school buildings?

Answer: The City has not defined such thresholds.

6) If the number of participants exceeds the targeted 5mln ft^2 or building areas and 70 organizations, can we still include additional fee proposal for additional amount if it exceeds by more than 10% than the set target?

Answer: At this time, the City is not considering additional fee for trainings if they exceed these targets. Proponents may note if they choose that they have upper bounds for the number of participants / building square footage they can provide training for.

7) Will potable water use be also used for benchmarking and/or competition, since one of the additional priorities for City of Richmond is promoting water conservation? More specifically, will each participant be submitting water use data in the Portfolio Manager database?

Answer: The City would like participants to track potable water.

8) The RFP states: On Page 9: 10. Scope of Consultant Duties - 10.1 The Consultant will:
h) Facilitate connections to building energy assessments, utility programs, and energy upgrade contractors."
In Addendum #1:

ergy Assessment & Upgrade Implementation		
Participants receive energy assessments	Fall 2014	Consultant will serve as a resource to assist with identifying energy assessment opportunities. Trainings will help users identify appropriate programs.

Is the consultant responsible for providing an energy assessment, or simply recommending other existing programs? If the consultant is responsible for providing an energy assessment to the business owner, could the expectations of the assessment be further defined?

Answer: The Consultant is expected to recommend existing services and associated utility programs that provide assessments. (See answer to question 2 above).

9) Do the pre- and post- surveys referred to in section 10.1 c) refer to pre- and post- surveys for each training session or do they refer to pre- and post- surveys for participating in the overall Energy Challenge program?

Answer: The overall Energy Challenge.

10) Does the City expect the training to be delivered in person in traditional workshops or through self-paced on-line training modules?

a. If it is the former, how many training sessions does the City expect to be delivered and how long are the sessions expected to be?
b. If the latter, will the City provide the on-line medium for delivering the training?

Answer: The City expects the training to be delivered in person. Online training resources could add additional/supplemental value. Moreover, the City will consider proposals that can document there is greater value in primarily online training. In response to part "a" of the query, the City would like proponents to indicate the scope of training they can provide as part of their methodology. While the RFP provides some indication of the anticipated content and number of trainings, we expect proponents to suggest appropriate training based on their expertise in energy management, and the services they can deliver within budget.

11) Can you please expand on the City's expectation for the participant relationship management system? This can take several forms depending on the City's expectations. It could include online collaboration tools that allow participants to share ideas and experiences among themselves and/or with trainers, it could include comparing performance of participants.

Answer: At minimum, the City anticipates that the program will require a customer relationship management (CRM) system that would include:

- A database of participating buildings and associated contacts;
- Tracking of pertinent information, including:
    - contact details;
    - building information (address, square footage, etc);
    - participants' participation in trainings, workshops, etc;
    - participants' engagement in an energy assessment; energy upgrades being considered.
- Functionality to facilitate communications with participants (e.g. facilitate email to all participants).

CRMs with greater functionality will be considered. The City is keen to learn about platforms that would allow for sharing ideas, comparisons of building performance versus benchmarks, etc. Such functionality could be welcomed in a CRM.

12) Second page of Appendix 2 refers to peer process meetings that are facilitated by the consultant. How many peer process meetings does the City expect to held for each cohort?

Answer: The City anticipates such meetings could occur quarterly.

13) Second page of Appendix 2 refers to additional participants-defined training. Does the City expect the Consultant to develop and deliver additional participant-defined training in the Spring of

2015? If so, does the City expect these to be delivered in person in workshops or through self-paced on-line training modules?

Answer: The City expects the consultant to develop and deliver additional participant-defined training. The City expects these be available in person.

14) If is the former, how many training sessions does the City expect to be delivered and how long are the sessions expected to be? If the latter, will the City provide the on-line medium for delivering the training?

Answer: The City would like proponents to suggest the scope of training they can provide as part of their methodology.

15) Second page of Appendix 2 refers to the consultant verifying data submitted for Energy Awards. Could you please expand on the City's expectations? This can be done in a number of ways. It could include verifying that the participants have implemented energy efficiency measures through site inspections, or comparing pre- and post- data from ESPM.

Answer: The City anticipates this would involve reviewing ESPM data, as a check to ensure that benchmarking practices are reasonable and appear accurate. This would likely include reviewing building square footage, scheduling assumptions, utility data, and other fields, as a "second set of eyes" to ensure entries reflect reality.

End of Addendum #2
Regards,

Julia Turick
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