

Proposer Questions and SVCE Responses related to

## RFP for Design, Implementation, and Portfolio Management Support for Decarbonization Programs

Revised with new questions and posted to <https://svcleanenergy.org/solicitations/>  
on September 7, 2023.

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The following questions were submitted by prospective proposers to SVCE before the questions deadline of 5 p.m. on July 14 and before the revised questions deadline of 5 p.m. on September 6. All questions received are shown below along with SVCE staff's responses. New questions received between July-September are shown in green at the end of this list.

### General

1. The top of Exhibit D states, "Please submit a separate Exhibit C for each Subject Area." Should this say, "Exhibit D"?
- Response: Yes, there is a typo in the first statement at the top of Exhibit D. The correct statement is: "Please submit a separate Exhibit D for each Subject Area." An updated version of the RFP that includes this correction has been posted on our [Solicitations](#) webpage.
2. We will require more than 2 pages to provide all of the pricing details requested for both Subject Areas A and B. Would SVCE consider expanding the page limit in this section to 4 pages?
- Response: The page limit of the Cost Proposal (Section 5, Part 6 of the RFP) is hereby revised to 4 pages, regardless of which Subject Areas are covered in the proposal. An updated version of the RFP reflecting these changes has been posted on our [Solicitations](#) webpage. Please see response to Question 3 for revised total page limits.
3. The proposal page limits do not allow sufficient space to fully address the scope of work requirements for Subject Area B that are outlined in RFP Section 16, Subsections B1-B6. Would SVCE consider expanding the page limit in the "Proposed Solution" section from 10 pages to 20 pages for proposals that include both Subject Areas A and B? Alternately, can bidders provide additional scope of work details as a separate appendix? We want to ensure that we submit a proposal that is sufficiently comprehensive for SVCE's evaluation.
- Response: The proposal page limits are intended to ensure we receive concise proposal responses and to allow reviewers a reasonable time for a fair evaluation. We encourage Proposers to keep this in mind while preparing responses.

SVCE will accept up to 10 additional pages covering content in Section 5, Part 4 (Proposed Solution) as a part of the Appendix to a proposal for either or both Subject Areas. Please label these pages clearly as a continuation of Section 5, Part 4 of the proposal response.
4. Will SVCE provide an alternate date for a pre-proposal conference due to the incorrect Zoom link provided in the solicitation?
- Response: We apologize for the confusion with the links. [Here](#) is a link to the Zoom recording of

the teleconference. The password to view the recording is u8FSh@t0. We can also schedule a 1:1 call if you'd like.

## Subject Area A: Program Administration

No questions received.

## Subject Area B: Programs Portfolio Tool

1. Does SVCE have an existing software system in place that we'll be migrating from?  
Response: There is no single software system for program management currently. SVCE works with multiple vendors, so have a few different software systems that we would need to migrate program data from.
2. Is there any need to import historical data? If so, what format is the data available to be imported?  
Response: There is existing program enrollment data which we would like to import into the new tool to populate initial dashboards and reports. The data is in XLSX/CSV format.
3. What kind of external datasets does B.1. refer to?  
Response: CSV and XLSX files, to populate dashboards and reports with an initial data set.
4. Does SVCE have an existing CRM today that the new system would need to integrate with?  
Response: SVCE is not currently using a CRM to manage programs. We use Calpine as our billing CRM.
5. Would SVCE prefer that the selected vendor develops a Salesforce solution, or is SVCE open to solutions already developed on a Salesforce platform, which SVCE can then license?  
Response: SVCE is open to both approaches. We are interested in a vendor implementing an existing off the shelf solution and customizing it for SVCE. However, we are also open to a vendor-developed solution that could be further customized for SVCE.
6. Is the vision that the vendor would develop the software system on top of Salesforce, SVCE would own the license, and during the 5-year contract the vendor would maintain it and add additional features?  
Response: Yes, that is one approach we are interested in, where the vendor implements a software system and maintains it over the contract term.
7. The RFP language is written with a CRM-specific focus; please confirm that SVCE is open to other system types that would meet the RFP goals such as application intake and processing, workflow and budget management, and reporting.  
Response: SVCE is open to other system types, not only a CRM system.

8. Please provide the date by which all programs and functionality must be delivered, and the system must be considered fully live.

Response: SVCE is interested to see a proposed delivery schedule including specific tasks from the Bidder, based on the description in the RFP.

9. Please provide a complete list of programs that are in scope for Subject Area B, and please provide the following details for those programs:
- Please identify new vs. existing.
  - Please identify which programs would require a customer or trade ally self-serve intake portal.
  - Please identify the existing implementer for each existing program, including where SVCE is self-implementing.
  - Please identify whether each implementer will be using their own system to manage the programs and then sending a data feed to the centralized tracking system, or whether they will be using the centralized tracking system to process applications.

Response: SVCE is interested in determining a list of existing programs that are a good fit for Subject Area B in collaboration with the selected vendor. However, at this time SVCE believes there are 8-10 programs that are good candidates for Subject Area B.

10. Please provide a list of systems and system providers that require an interface (e.g., SAP ERP, Work Order management, CRM (Microsoft Dynamics, Salesforce, etc.), and so forth).

Response: The following is a list of systems we expect the Programs Portfolio Tool to interface with: One invoicing SaaS product, one electronic document signature SaaS product, one email system, one data warehouse, and one CRM housing customer utility account data. During the interview stage, SVCE can discuss specific providers.

11. What is the new/existing system referenced in the final bullet in RFP Section 16-B3: *"Integrate with existing and planned systems for tracking customer interactions (e.g., a system used by third-party SVCE vendor to manage billing system inquiries, and an upcoming system which is a concierge for general customer inquiries on how to electrify)."*

Response: This references a Solicitation in May 2023 SVCE had for an Electrification Concierge to help homeowners identify ways to electrify their property.

12. Does online payment functionality need to be integrated into our solution?

Response: The intention is that the new software can integrate with our existing payments software to improve our existing payments workflow.

13. Integration questions:

- Is a CIS (customer database) integration included in the work scope?
- What platform is the SVCE data warehouse?
- What billing system would we be integrating with?
- Please further explain the requirement to import/export data via an API into chosen formats.
- What other systems from section B would we integrate with?

Response: During the interview stage SVCE can discuss specific providers. The requirement to import/export data is to populate the new system with an initial dataset based on program enrollments. If the Bidder believes a CIS is an important integration for their selected solution, please include that step in the work plan.

14. What are the reporting requirements? (e.g., How many unique reports, etc.)

Response: This may change from program to program, but please assume 5-10 unique reports overall.

15. Please describe the forecasting model that is currently being used. This is in reference to RFP Section 16-B6: *"Ability to create forecasted budgets over a defined time period (ex. 5-years) and put in new, revised budgets (e.g., 2x per year)."*

Response: The existing forecasting model is in XLSX format.

16. Is SVCE looking for the vendor to cut the incentive checks for rebate fulfillment, or will SVCE cut the checks based off of a data feed from the tracking system?

Response: Please include your preferred approach in the proposal response based on what would be most efficient.

17. Please provide an estimated volume of residential and commercial applications that are expected on an annual basis.

Response: For the purposes of the RFP, please assume 3,000 total applications per year across 8-10 programs that will use the tool in Subject Area B.

18. Should we include licensing costs in our bid?

Response: Yes, please see page 6-7 of the RFP for more details.

19. B2. Workflow Automation: *"Automate payments of incentives and consultant invoices once an expense is approved by SVCE staff."* Does this mean the payment auto completes by the system? Or it creates and sends invoices for offline payment?

Response: Similar to the question above on Page 15, the intention of this bullet point is that the new software can integrate with our existing payments software to improve our existing payments workflow.

20. The RFP states that SVCE's preference is to license and own the software system for the Programs Portfolio Tool. Would SVCE consider a "software as a solution" (SAAS) service?

Response: Yes, a SAAS could be viable. SVCE would still prefer to hold the license.

21. Does SVCE's preference to own the software system come from a concern about potentially having to start over in the future if the vendor changes after the contract term?

Response: SVCE would strongly prefer to retain ownership of the Portfolio Tool over the long term because we view this as a key business process for our agency.

22. Please confirm that it is not a requirement for SVCE to own the software; this requirement would exclude SaaS offerings.

Response: If a SaaS offering is used, SVCE needs to hold the license rather than the selected vendor holding the license to the SaaS offering. If a SaaS offering is used, SVCE does not need to own the software.

## Additional Questions received between July-September

27. Can SVCE please confirm the correct dates of the interviews for selected firms? Addendum No. 2 has a discrepancy – it lists October 9 and 10 as the interview dates on page 2 and then October 16 and 17 on page 3.

Response: Our apologies for the typo. The correct dates for interviews for selected firms are October 9 and 10, between 10am and 2pm. This has been corrected in Addendum No. 2.

28. In Section 5 Proposal Submittal, subsection 5. Proposed work plan and schedule (1 page) it says see Exhibit C for format. But on the Exhibit C form it says “Do not use for Subject Area A.” Is there a different format SVCE would like bidders to use for Subject Area A? If so, can you please identify and provide the format you would prefer for Subject Area A?

Response: For Subject Area A, SVCE envisions establishing a Master Services Agreement (MSA) to cover a broad set of services to support decarbonization programs. Under this MSA, SVCE will issue Task Orders for each individual program with a defined scope of work. For this reason, it wouldn't be possible to present a work plan for a scope that is yet to be defined. Therefore, proposers are not required to submit an Exhibit C for Subject Area A.

In lieu of Exhibit C, Proposers *may* (optional) submit an example work plan for a hypothetical program that your team might support SVCE on through its design, planning, launch, and management phases.

Subject Area A proposers should certainly respond (in narrative form) to the remaining bullets in RFP Section 5, Part 5 (Proposed Work Plan and Schedule):

- “Illustrate how the work plan would proceed and what the key milestones or benchmarks would be, along with required levels of SVCE staff and stakeholder engagement.
- Describe in the work plan how the Proposer's team plans to collaborate to address both Subject Areas A and B. Collaboration may be within the Proposer's team if responding to both Subject Areas, or with the selected consultant for the other Subject Area.”

29. Section/Page #: Exhibit B: What is SVCE looking for bidders to include in Exhibit B? Is that where the entire technical proposal should be added?

Response: Proposers are not required to respond to Exhibit B as a part of their proposals. When SVCE eventually executes the contract with the final selected vendor, the contract agreement will include Exhibit B – Scope of Services, which will essentially be the selected vendor's technical proposal with any modifications as agreed to between SVCE and the vendor.

30. Section/Page #: RFP Exhibits (especially B, C, and D): Do bidders need to submit the Exhibits in SVCE's forms or can we use our own formatting as long as we address the requirements?

Response: We ask that Proposers use the provided format in Exhibits C and D in their proposals. (Exhibit B is not required to be submitted in your proposal). This will greatly help expedite the proposal review at our end. Proposers are encouraged to include narrative assumptions, as

appropriate, in these exhibits, and are also welcome to list additional tables in addition to the required ones in these exhibits.

31. RFP p. 10, Section 13, Addenda: The RFP states, "It is the Proposer's responsibility to contact SVCE prior to submitting a proposal to ascertain if any addenda have been issued, to obtain all such addenda and return executed addenda with the proposal." What should bidders do to formally execute the addenda? Should bidders sign the addenda and submit them as an appendix?

Response: All Addenda issued for this RFP are posted on SVCE's [Solicitations webpage](#). Proposers should review all Addenda and Question & Answer documents to ensure their proposals are responsive and are meeting any requirements and clarifications provided by SVCE following issuance of the original RFP. No additional steps are necessary (i.e., no need to sign the addenda and submit them to SVCE).