



**ADDENDUM #1**

**REQUEST FOR PROPOSAL**

**FOR**

***ORANGE COUNTY CITIES SOUTHERN CALIFORNIA EDISON (SCE) ENERGY  
EFFICIENCY STRATEGIC PLAN: Develop Enterprise Energy Management Information  
System ("EEMIS") Request for Proposal ("RFP")***

*City Manager's Office*  
**CITY OF HUNTINGTON BEACH**

**Released on 04/22/2011**  
Addendum Released on 5-9-2011

**Develop Enterprise Energy Management Information System  
REQUEST FOR PROPOSAL (“RFP”)  
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Q. Please confirm that the price quote should be a single lump sum, and does not need to be broken out by city.

A. Quotes should be presented as one instance of the software but with as many unit priced alternates as necessary for each proposal. Single lump sum for the require functionality and unit pricing with appropriate qualifiers for required capabilities.

Q. In reference to Criteria Four: Utility Billing, will the selected vendor have online access to all utility accounts? If not, in what format will the billing be provided?

A. The cities are willing to sign 1 year CISR authorizations, if necessary. However, demonstrated success with SCE and SCG in securing, transferring and uploading billing determinant data utilizing FTP data interchange is essential.

Q. Are any energy suppliers Direct Access?

A. No

Q. Criteria Five: Technology, r. Push Information – What sort of notifications does this refer to?

A. Emails, text messages or in application notification of exception reporting.

Q. Is there a preferred integration technology? (.csv through secure FTP, or Web Services?)

A. The cities are agnostic on preferred integration technology with utility providers. However, preliminary information suggests that secure FTP is preferred by all parties.

Q. What buildings and systems are included in this project scope? If possible, please provide a full building list, including relevant building management, or metering systems in place.

A. There is a table of utility accounts by type on page 10 of the RFP. Utility accounts in local governments comprise many different end uses and most are not buildings. The integration with specific building systems (HVAC, controls, lighting, etc.) is not funded. It is merely a required capability.

Q. Given the project completion date of 9/30/2012, can we assume that all cities have budgeted resources to assist in the system setup?

A. The funding is described on page 1 of the RFP. The cities anticipated that there is sufficient funding for the required functionality of the EEMIS.

Q. Is data currently available in electronic format for the five cities? If so, what format(s)?

A. No, demonstrated success with acquiring billing determinant data from SCE and SCG is essential for the service provider's success.

Q. Criteria One (d): Will it be the responsibility of the selected vendor to build all vendor rates into the EEMIS and maintain them for five years, or is the intent for OCC staff to be trained to maintain the vendor rates?

A. The selected vendor will maintain the published tariff rates and options for SCE and SCG for five years. Training should be included to train staff to maintain minor vendor rates.

Q. Criteria Two (b): This requirement states that the EEMIS must "...confirm proper equipment sizing" for capital projects. This is potentially a huge, complex requirement. For example, take the case of a capital project involving a new central chiller plant. The mechanical engineer may have spent hundreds of hours and used a variety of sophisticated analyses and systems modeling tools to size major components of the system (chillers, pumps, piping, condensers, etc). Is it a requirement for the energy tracking system to have the sophistication to model building and mechanical systems in order to size the components? Please clarify.

A. The EEMIS system should be able as part of the required capability, when connected (in the future) to an EMS provide directional insight into sizing replacement equipment for maintenance workers, contractors and engineers.

Q. Criteria Two (b): This requirement states that the EEMIS must "...verify projected avoided costs." Must the system perform energy savings Measurement & Verification (M&V) that is IPMVP-compliant?

A. The closer to IPMVP compliant for all four options the higher the score will be on this topic.

Q. Criteria Three (g): Is this requirement to track carbon footprint or consult with OCC on funding for new projects?

A. Capabilities for creation of carbon credits from implemented energy efficiency measures or renewable energy generation are essential. The ability for a vendor to offer competitive payment in exchange for those credits will secure top scores with regard to this topic.

Q. Criteria Four (a): Is it a requirement for the system to receive EDI bills from SCE, or will flat file (e.g., CSV, TXT) bills be accepted? If EDI, will OCC want to export billing data from the EEMIS to each city's accounting system?

A. EDI is not a requirement, secure FTP is a requirement. Exporting to each city's accounting system is an attractive option but not mandatory.

Q. Does OCC want the selected vendor to manually enter bills (for water, fleet fuel, waste, etc.) that are not provided in electronic format or will city personnel enter those bills?

A. No. Manual entry of bills is not acceptable. At a minimum, electricity and natural gas shall be directly imported. If electronically available, the other bills shall be imported as well. Manual entry capabilities shall be provided for each city's use at their own discretion.

Q. The RFP states (p. 3) that "EEMIS will integrate sub-metering for parallel metering and commissioning for future expansion." Over what period of time (months, years) does OCC expect to add the sub-metering functionality?

A. It depends on each city's budget, capital improvement program, incentive funding and many factors. It is a required capability, but likely years.

Q. Page 12 of the RFP it states:

*E. Prime Contractor and Subcontractors*

*Funding is provided pursuant to the Public Goods Charge collected from gas and electric Utility customers pursuant to state law.*

Is this simply a statement of the source of funding (or) are there specific contracting and business conditions associated with this funding source that are beyond the terms and conditions referenced or included with this RFP? Please clarify what information is required in this section.

A. No, it is not expected that requirements beyond the RFP will be required of the vendor. However, PUC/SCE regulatory environment is such that additional requirements may be imposed/removed at a later date.

Q. Do the separate three price proposals count towards the 25-page limit?

A. No

Q. How many customers/buildings are within Partner Cities?

A. Page 10 of the RFP provides the most current information on this topic. There are many more utility accounts than there are local government facilities.

Q. Can you please supply drawings of Partner Cities typical metering network?

A. No. Integrated with EMS is a required capability for use in the future.

Q. Are all Partner Cities on the same network?

A. No

Q. Rate and Bid Option Evaluation Please provide examples of rate schedules for each of Partner Cities.

A: See the SCE and SCG tariff books.

<http://www.sce.com/AboutSCE/Regulatory/tariffbooks/default.htm>

<http://www.socalgas.com/regulatory/tariffs/tariffBook.shtml>

Q: Provide total number of utility rates for each commodity (eg. Electrical, Gas, water, wastewater, etc.) per Partner Cities?

A: Page 10 provides this information. All SCE and SCG tariff rates shall be supported for the 5 year term.

Q: Rate and Bid Option Evaluation- Will rates be maintained by Vendor or by Partner Cities for the 5 years?

A: Vendor

Q: Demand Management and Pricing Response Provide details of demand response. What are the expectations, how many sites/buildings, how many loads, what level of curtailment?

A: The expectation is that the system will help the cities and utilities understand local government demand response capabilities and provide some infrastructure to assist local governments in meeting demand response goals in the SCE Energy Leader Partnership. Essentially, it will be another management tool to participate in Demand Response in addition to any software provided by a demand response provider contracted for separately.

Q: Demand Management and Pricing Response Will Partner Cities leverage the EEMIS information to participate in existing SCE Demand Response Program, or is the EEMIS expected to deliver the demand response program!

A: No, the cities will contract for demand response aggregation services separately. The EEMIS tool will provide another management tool providing diagnostics and insight into energy management programs.

Q: What meter data systems are in place today within Huntington Beach and the Partner Cities? Is there a standard interface in place to harvest meter data? Are current meters recording in consistent fashion (i.e., every 15 minutes or similar intervals)? Is this data uploaded in real time or in batch?

A: SCE and SCG revenue grade meters and their associated specifications. The data on page 10 of the RFP illustrates the totalizing versus time of use meters at the cities.

Q: Are the Partner Cities using standard baselines today (please describe), or do they have a particular type of baseline from which to base demand profiles for procurement data? Does the requirement for billing grade accuracy apply to sub-meters as well as master (revenue) meters? Do the Partner Cities plan to participate in any SCE programs using OpenADR signaling? Will Partner Cities register loads directly with SCE for DR programs, or do they plan to use an aggregator?

A: None of the cities are on Direct Access. The EEMIS system will create these baselines for future procurement. The cities will contract for DR aggregation services separately.

Q: Alarm Management Please provide alarms details in regards to rate, priority, management

A: Alarms set for key parameters (budget, demand limiting, demand response, etc) will be capable of being emailed, texted or displayed in the application. The rate, priority, frequency shall all be user selectable.

Q: Equipment Diagnostics Will the EEMIS system be responsible for reading on of all of the metering identified on EEMIS Local Government Accounts table on Page 10? Have these devices been selected? Can details be provided?

A: Yes, the details are SCE and SCG revenue meters. The required functionality is that the meter data is supplied in a day after fashion by the IOUs. However, the ability to install parallel metering or pulse boxes will be an important selection criteria.

Q: Carbon Finance Energy Efficiency credit financing opportunities continue to evolve. Please provide additional information regarding your expectations for the carbon financing services.

A: Top scores will be earned by firms that are able to offer revenue to support local government energy efficiency programs in exchange for documented avoided emissions through the software.

Q: Interval data Can you provide more information on the different data sources?

A: SCE and SCG revenue meters are the primary data sources. Additional, data sources would be monthly excel reports from fuel vendors, inter-agency accounting transfers for water and waste bills. Additionally, some cities have a small number (<15) sub-meters (Veris) with modbus cards that will need to be integrated.

Q: Metering Manufacturers, versions? Can you provide details and example of the flat file export? Is there a requirement to pull in existing historical data from an existing system?

A: SCE and SCG secure FTP file formats. Historical data would be from the same source.

Q: Cost Allocation Approximately how many cost allocations (Facilities Departments) will be Included?

A: Cost allocation should accommodate the following distinctions and will follow local each local government's budgeting practices. Enterprise departments, General Fund departments, Departments that have their own Department Head (Fire, Police, Planning, Building & Safety, Public Works, Community Services, Non-departmental, Administration/City Manager, Library, Water (waste, potable, storm, reclaimed)

Q: Can you define the level of support access required to the Partner Cities' reporting functions beyond a web link on a dashboard?

A: I don't understand this question. The noun appears to be support access. Google doesn't return any relevant results for support access. Local governments will need 24 hour access to the EEMIS system and the ability to export reports in common file formats (Excel, Word, PDF, etc.)

Q: Internet Based Communications Please clarify what is expected for *real-time* readings? Is this instantaneous readings/updates or historical based interval data.

A: This is a required capability to integrate with or replicate the physical metering in each facility for real time, demand response appropriate energy management.

Q: Define 2 way communications with devices please.

A: Field devices such as meters and sub-meters should be able to receive instructions and send instructions from the EEMIS.

Q: Who is the vendor, preferred vendor, and what software packages/interface are they using?

A: There isn't a selected vendor.

Q: Can you provide more information on the different external sources (Weather Service, RTP and Settlement data, Account Payable system etc...)

A: Weather data such as National Weather Services, future SCE or Direct Access provider real time pricing data, Accounts Payable system integration capabilities are essential but implementation is subject to many variables. The common full-featured EEMIS integrations are what the cities are expecting.

Q: Can you provide a list of the data type you wished to be supported?

A: SCE and SCG FTP billing determinant data as determined by their systems

Q: Where are the push notifications being sent? What information is being pushed?

A: Email, text or in application notifications for alarms/notifications such as budget, demand limiting or demand response information.

Q: Greenhouse Gas Emissions and Reporting Can you provide details of the emissions and pollutions reports? Examples?

A: These are common in every full featured EEMIS but in a format that is acceptable to the Climate Registry and the California Air Resources Board (ARB) and potential purchasers of carbon credits.

Q: Is there a budget for this RFP?

A: Yes, there is a budget as described on page 1. The cities believe it is sufficient to secure the required functionality of this RFP.

Q: Have usage and demand profiles been generated for any of the participating municipalities prior to this project? If so, using what process or technologies?

A: No

Q: Once Energy or Emission credits/certificates have been derived, what markets are preferred for sale of these - US, international or both?

A: No preference at this time, besides the markets with the best prices to secure sustainable funding sources for local government energy management programs.

Q: Do planned enhancements to existing products to cover certain features get scored by the valuation committee?

A: Yes, they will be scored but not weighted as heavily as the immediately required capabilities.

Q: Do we need to submit proof of partnerships along with the proposal? What will serve as proof of partnership?

A: If the proposer has a partnership to deliver the desired functionality demonstrated success with that partnership in delivering similar services and references should suffice. If necessary the local governments will request clarification.

Q: Carbon Finance: Do you expect the winning firm to execute carbon contracts on behalf of the City? What financial reports from such carbon trading does city expect?

A: The ability to sell and provide revenue to local governments will earn top scores for this topic. The cities just wish to secure additional revenue for energy management programs on contractual terms that protect the taxpayers. The cities don't expect reporting beyond what is necessary to create revenue.

Q: On interval data input what time frame and frequency of metering data do you expect to collect?

A: SCE IDR data is typically 15 minute data. SCE's new smart meters that replaced the older totalizing meters collect hourly data.

Q: Would the cities accept having the data exist on cloud? Or must the data reside on-premise? Does the software have to be on-premise? is a SaaS solution acceptable?

A: The cities do not have a requirement for on-premise installation. SaaS is an acceptable solution as long as the software is provided under a perpetual license with provisions for data transfer in the event of termination/default, etc.

Q: Is there a requirement to have built-in security (access control of users, db access, etc) or integrated security (web-based single sign-on), and whether the application data falls under NERC CIP requirements.

A: The cities do not believe that NERC CIP requirements are triggered with this EEMIS. Security capabilities should be discussed by the vendors. The cities expect that each city will have access only to their accounts, unless they actively choose to share access with each other or vendors for climate action planning, energy project development or other management needs.

Q: With regard to submeter integration, are the submeters already installed at the various municipal sites? In either case, approximately how many submeters are envisioned for integration?

A: This is a required capability. This capability is a multi-year process. At this time there are fewer than 15 sub-meters with modbus cards that will need to be integrated.

Q: Will the various Partner Cities be using their own instance of the software or is one instance where all partner cities will be managed the preference?

A: The intent is that this EEMIS will be one instance of the software with appropriate user permissions specific to each city and the ability to administer those over time.