



**SUSTAINABILITY
OFFICE**

LUCY PERKINS
Sustainability

**ADDENDUM #1
FOR ENERGY MANAGEMENT SERVICES
BID#03-22**

Please note the following clarifications to the above stated bid due to be opened 2:00 P.M., Monday, July 12, 2021:

Here are answers to questions submitted by Friday, June 25, 2021.

Questions:

1. Currently which vendor is providing "Utility Bill Processing, Management, and Data Analysis"?

ANSWER: City staff across several departments currently manage bill processing, management, and data analysis. The Finance Department processes utility bills. The Sustainability Department, Water Resources Department, Facilities Department, and School Department all manage and analyze utility data to inform relevant departmental responsibilities. Data is managed in Excel documents and EPA Energy Star Portfolio Manager for properties covered by the City's Benchmarking Ordinance.

2. Can we get a copy of the current "contract" with the existing contractor for providing "Utility Bill Processing, Management, and Data Analysis"?

ANSWER: There is no existing contractor providing these services. The contract included in the RFP is what we have provided as a template.

3. What are the areas of the existing applications city is not very satisfied? Please give us some examples.

ANSWER: The City is not currently using a contractor or service for this application. Nonetheless, there are issues with internal bill processing, management, and data analysis. Over the past few years, many inefficiencies in the municipal energy data collection and management process have come to the fore. Data management is inconsistent across departments, there is no shared portal or hub for analysis, and visualizations or analysis are limited for informing action.

4. Currently, how much money is the city spending annually on "Utility Bill Processing, Management, and Data Analysis"?

ANSWER: Current spending on utility bill processing, management, and data analysis comes in the form of hourly and salary wages for staff. There is no additional cost.

5. What is the budget range for the current project's implementation cost and annual cost?

ANSWER: The City has earmarked approximately \$25,000 for the first year of implementation to cover annual subscription and service fees as well as implementation, training, and other one-time set-up charges.

6. How many customer license and employee-license is required?

ANSWER: For the purposes of this RFP, the Proposer shall assume that the City will require up to 10 user log-ins, five of which shall have administrative privileges, to any software platform offered.

7. Approximately when the city is planning to go live with the new system?

ANSWER: The City plans to "go live" when the software platform is properly installed with complete functionality and staff are adequately trained to use the software platform in their respective capacity. The City would like this process to take approximately 3 months.

8. Is the City is looking for 3 or 5 years of pricing?

ANSWER: The City intends to offer a contract for three (3) years with an option for an additional period upon mutual agreement.

9. How many years does the City want imported in the new system?

ANSWER: The City wants approximately 3 years of data imported into the system (2018-2021.) This data currently exists in spreadsheets and historical bills.

10. Will the selected vendor be required to provide Utility Bill Processing, Management, and Data Analysis for Portland Water District (potable water) and South Portland Water Resource Protection (non-potable water systems) accounts?

ANSWER: The selected vendor will not be required to provide services for potable water and non-potable water system accounts for the three-year contract. This may be re-evaluated should the City and selected vendor agree upon an additional contract period.

11. If yes, how many of each are there?

ANSWER: N/A

12. Are these utility bills provided to the city electronically? If not, then how?

ANSWER: Portland Water District bills are provided electronically.

13. Can you please provide additional details of the selection process? Will the city create a shortlist of potential vendors for interviews and system demonstration and then make a final selection?

ANSWER: A selection committee will review and score all proposals following the selection criteria outlined on page 11 of the RFP. At which time, the City may invite a shortlist of potential vendors for interviews and demonstration prior to selecting the winning bid. The City will contact at least three client references before to making a final selection.

14. How many bills will be received in electronic files and how many bills will be received as paper copies?

ANSWER: All bills are currently received in paper copies. We are open to exploring electronic access for a selected software provider to mitigate challenges or delays with paper bill processing.

15. Will the paper copies being provided to the software be clean or will there be any marks on them (i.e. are they good contenders for OCR)?

ANSWER: No, there are markings on paper bills that are required for processing. These markings include an approval signature and date in addition to a small sticker used to code invoices.

16. Is there any interval data that should be included such as building control systems data, data collected from city meters, data collected from solar inverters?

ANSWER: The Sustainability and Finance Offices do not currently maintain interval data. However, this is an important functionality of the selected software platform to inform asset management planning and maintenance schedules by the Facilities Department.

17. The RFP states the software should include digital copies of bills, for the non-paper bills, can we assume the City or the Utility will provide PDF's of the bills to store or do how will we get these scanned copies to store?



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ANSWER: Yes, the City will provide PDFs of utility bills. All utility bills that received were 2015-2017 are catalogued electronically after being scanned into the system. Historic data imported into the system will date back to 2018.

18. Could you provide a sample of the City’s historic data?

ANSWER: Included in this addendum are two spreadsheets of historic data (2018.) The Municipal Energy Database shows annual usage. The Electricity Spreadsheet shows management on monthly electricity use data. Note that some buildings have been taken offline since this spreadsheet was created. This is meant to serve as a template for what the city maintains.

a) Can you confirm if the historical data broken down by account and meter if it is a rollup of the building level?

ANSWER: Historical data is organized by account/meter and tied to a building.

19. Does the City desire the selected provider to receive all utility bills from vendors through web download, where available, or mail reroute?

ANSWER: As noted in the answer to question 14, the City seeks an efficient and effective process to provide utility bills to the selected service provider. This may take the form of web download where possible but the City is unlikely to pursue mail reroute as this would interrupt bill processing procedures.

a) Could you provide a list of utility vendors and how many bills do you receive per vendor? What format can we expect to receive bills in per each vendor to upload into the system?

ANSWER:

Vendor	Utility	Billing Period	Format
Central Maine Power	Electricity	Monthly	Paper
ReVision	Electricity	Monthly	Paper
Green Sun/Alternative Energy Financing	Electricity	Monthly	Paper
NexAmp	Electricity	Monthly	Paper
Unitil	Natural Gas	Monthly	Paper
Downeast Energy	Propane	Intermittent	Paper
Dead River Co.	#2 Fuel Oil, Propane	Intermittent	Paper
Irving Oil	Propane	Intermittent	Paper

Suburban Propane	Propane	Intermittent	Paper
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20. Does the City desire the selected vendor to provide services to follow up with utility vendors to resolve issues such as missing bills, account changes, add/remove utility accounts, etc.? Or will the City manage these activities directly?

ANSWER: The selected vendor will manage these activities, notifying the City as necessary, and follow-up with the vendor directly. The City desires the selected vendor to audit the bills for any of the following: duplicates, abnormal dates, missing bills, or excessively high or low usage, cost, unit cost, or demand. The selected vendor should ensure applicable rates, tariffs and costs are accurate and correctly applied.

21. Could you clarify or provide additional information on the statement “Please highlight how your firm on-boards new utilities to support their billing practice in the software platform?”

ANSWER: The City’s electrical utility, Central Maine Power, does not maintain a service area outside of Maine. Therefore, unless the selected vendor already has customers within Central Maine Power territory, the vendor may need to develop a custom template to automatically import data from paper electricity bills.

22. The City does not list Water and/or Sewer in the list of commodities to be included. Would the City want to add these as part of this project or potentially at a later time?

ANSWER: See answer to question 10.

23. What is the age (last 5 or 10 years) of the historical data that the proposed system will keep? What data needs to be imported from the spreadsheet?

ANSWER: Historical data imported into the software platform should date back to 2018. The City currently maintains a spreadsheet with account information (location, utility provider, and account number,) usage data (monthly and annually,) and cost data (monthly and annually.) This data should be imported either from the spreadsheets or from past bills. Interval data should be included moving forward.

24. What is the scope of Audit utility bills? What needs to be checked?

ANSWER: See answer to question 20.

25. Will the proposed system have an online payment facility? How this payment will be received in the proposed system? What payment gateway will be used in the proposed solution?

ANSWER: The City does not seek an online payment facility through the selected software platform.

26. What kind of billing errors are being faced by the City in the current billing system?

ANSWER: The City has encountered errors with incorrectly applied solar credits and intermittent missing bills month-to-month for individual accounts. The latter issue leads to an inaccurate representation of energy use.

27. What systems are being used for electric, natural gas, fuel oil, and propane in the City? Do we need to read the meter data from these systems for billing? How the data consumption will be brought to the proposed solution?

ANSWER: The City manually collects data off of the utility bills. The Finance Department uses MUNIS to process all utility bills. It will be up to the selected service provider to offer an efficient and effective process to incorporate accurate and timely energy consumption data into the software platform. This process may leverage web downloads of consumption data from the utility and may incorporate general ledger numbers for interoperability with financial systems.

28. What relevant data needs to be imported to Energy Star Portfolio Manager?

ANSWER: In order to comply with the City's Benchmarking Ordinance, all city buildings with more than 5,000 sf of gross floor area must report data through Energy Star Portfolio Manager. The selected software provider would be asked to automatically import monthly energy use (heating fuel and electricity) for these covered buildings. Energy data must be imported no later than May 1 for the prior calendar year.

29. What is EUI?

ANSWER: Energy Use Intensity.

30. What is the scope of current and actionable information that the City is looking for?

ANSWER: Broadly, information that informs efficiency measures and deferred maintenance schedules. Data visualizations in the form of reports and charts will show how municipal buildings consume energy and help inform strategies to meet sustainability goals and reduce municipal energy use. Interval data will direct asset management plans and improve facility maintenance and planning.

31. What are scope 1 and scope 2 emissions? What is included in data aggregation, data sorting and cleaning, and data conversion into GHG emissions?

ANSWER: See ICLEI's [Global Protocol for Greenhouse Gas Emissions Inventories](#) for a description of Scope 1 and Scope 2 emissions. Data maintained and aggregated in the software platform for municipal and school buildings will be used to update municipal and community-wide inventories periodically.

32. Please provide a number of staff role wise like a technical team, core functional team, end-users, etc.

ANSWER: Sustainability Director, Sustainability Senior Program Manager, Finance Director (City), Deputy Finance Director (City), Finance Director (Schools), Facilities Director (City), Facilities Director (Schools)

33. How the City currently tracks electricity accounts associated with net energy billing (both kWh and monetary credits)?

ANSWER: The City currently tracks electricity accounts associated with net energy billing, both kWh and monetary credits through manual review of bills and entry into spreadsheets.

34. What are other systems apart from Munis general ledger system that needs to be integrated with the proposed solution for the City?

ANSWER: Energy Star Portfolio Manager

35. Please explain the scope of the Net Energy Billing / Distributed Generation Tariff program? What needs to be checked?

ANSWER: With the installation of three additional solar arrays in South Portland and a contract for off-site solar coming on-line in 2021 and 2022, 91% of city electricity accounts will be covered under net energy billing agreements. Utility bills will need to be reviewed for appropriate allocation and cascading of net energy billing credits across accounts.

36. Provide a list of all systems that need to be integrated with the proposed solution for the city?

ANSWER: Energy Star Portfolio Manager and MUNIS

37. Do we need to pull data from these systems? What are these platforms or systems? How billing process will be integrated with these systems?

ANSWER: Data needs to be imported or synchronized into Energy Start Portfolio Manager for select City buildings from the software platform provided by the selected vendor, (see question 28 for more detail.) Consumption data for each account should also be coded with a general ledger number for interoperability with MUNIS and Finance Department accounting processes.

38. Are there any third-party printing services for billing?

ANSWER: No.

39. Are there any third-party notification services for the customers?

ANSWER: No.

40. Is there any integration with Arc GIS?

ANSWER: No. The City does utilize ArcGIS applications and in the coming years, the City may explore the use of Universal Building Identification (UBID) to support implementation of the Benchmarking Ordinance. However, for the three-year contract period, no integration is appropriate.

41. When the city is planning to go live?

ANSWER: See answer to question 7.

42. Currently which vendor is providing “utility bill processing, management, and analysis services” ?

ANSWER: See answer to question 1.

43. Can we get a copy of the current “utility bill processing, management, and analysis services” ?

ANSWER: See answer to question 2.

44. What are the areas of the existing applications city is not very satisfied? Please give us some examples.

ANSWER: See answer to question 3.

45. Currently, how much cities is spending Annually on “utility bill processing, management, and analysis services

ANSWER: See answer to question 4.

46. What is the budget range for the current project’s implementation cost and annual cost?

ANSWER: See answer to question 5.

47. How many customer license and employee-license is required?

ANSWER: See answer to question 6.

48. Approximately when the city is planning to go live with the new system?

ANSWER: See answer to question 7.

Lucy Perkins
Sustainability Coordinator



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Please sign and return with your proposal.

Receipt of Addendum #1 to the City of South Portland Bid #03-21 is hereby acknowledged.

Signed: _____
(Corporation, Firm or Company)

By: _____
(Officer, Authorized Individual or Owner)

Title: _____

Mailing _____

Address: _____

Zip Code: _____ Date: _____

Telephone: _____ Fax: _____

Email: _____

NOTE: Bids must bear the handwritten signature of a duly authorized member or employee of the organization making the bid.

