RFI INFORMATION SESSION QUESTIONS AND ANSWERS

City of Seattle
Request for Information
RFI No SCL-16834
TITLE: Building Analytics System
Information Session Questions and Answers July 20, 2017 11AM

General Information

Number	REQUEST FOR INFORMATION #SCL-16834
Title	BUILDING ANALYTICS (BA) SYSTEM
Bids Due Date/Time	8/11/2017 3:00:00 PM Pacific
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Department	Seattle City Light (SCL)
Description	Seattle City Light is issuing this Request for Information (RFI) to obtain feedback from Software Vendors with experience in providing the following scope of services: to identify and implement a Building Analytics (BA) Management System. Viable and valuable information about buildings, energy audits, and energy efficiency projects remains stranded and isolated within CES and is not available internally or to external business partners. The purpose of the Building Analytics (BA) system is to aggregate building and customer energy data from multiple internal and external sources and provide analytics and reporting for a wide range of users. The system should provide the tools to quickly ascertain program participation, what measures were installed where, how long ago, and who might benefit from participation in additional CES programs.

Questions and Answers

No.	Question	Answer
1	Has funding been allocated for the Building Analytics Management System yet? If so, through which source (budget, CIP, state/federal grant etc)? if no funding is secured, which sources will be sought and when?	Internal City Light funds are allocated and will be used to purchase the Buildings Analytics (BA) system.
2	What is the anticipated release date of a comprehensive, accurate, and up-to-date Scope of Work?	The entire and most up-to-date Scope of Work (SOW) was released as part the published RFI. We anticipate revising this SOW based on

		the vendor responses we receive as part of our current RFI effort. A revised SOW will be released as part of a BA RFP, in mid-September.
3	What would be the timeframe for releasing a subsequent RFP?	Our revised schedule has the RFP release scheduled for mid-September and a pre-submittal conference set for late September. Final dates have not yet been determined.
4	What system is Seattle City Light currently using as a Building Analytics Management System, if any?	Calling a huge Excel file a system might be a stretch but we currently have a data file which we call the Business Customer Database or BCD. It combines billing and account data from non-residential customers, fields from the King County Assessor's database, and our energy conservation files from 3 separate sources into one single file.
5	Who provided the current system and when?	The classification of the non-residential buildings and the creation of the BCD file was completed by Data Marketing, Inc. (DMI). The first BCD beta version was created in 2011. DMI was recently acquired by Almaden Press, for questions related to DMI please contact Adele Bihn at adele@almadenpress.com.
6	Do you anticipate needing any consultation services for this project?	Yes, we may need a change management consultant for our internal staff. However, we already have access to that expertise via several On-Call Technical Assistance contracts.
7	Will the Building Analytics Management System need to interface or integrate with any other systems/software?	Most definitely! Please refer to Part #5, the embedded Excel file in 1.) a. Interface-001 to Interface-025 for a complete list of those systems or software.
8	How many users will be utilizing the Building Analytics Management?	We anticipate an initial user group of approximately 100 users. About 60 of those users will be internal to Customer Energy Solutions, the other 40 users will be from the Account Executive office, Distribution Planning, Office of Sustainability & Environment, and Financial Planning & Rates.
9	The current Business Customer Database is referenced throughout the document. During the information session on July 20th, it was stated that this same database is also used by marketing for relationship management activities for end users (non-residential accounts). Is this current database an account level database or a building database? If the former, what processes are in place today that enable City Light to formulate a "building database"?	Currently, the Business Customer Database (BCD) relies on an extract from our former billing system (Consolidated Customer Service System) to identify all non-residential accounts. Account premises are aggregated at the parcel level. That may mean one account=one building or it may mean multiple accounts=multiple buildings on multiple parcels. A DAP (Discrete Address Point) is an excellent proxy for a building on a parcel. There may be multiple premises at a DAP, the

		DAP/premise numbers are then associated with that building.
10	Q-1 In Part 3, "Current Conditions", number 2e, it is stated that "many data sources needed were never incorporated into the current BCD". What are those data sources? What databases are a requirement and Q-2 how many of those databases are building level information versus business (or customer) level information? Q-3 How does City Light expect to merge building level data with business data (non-resident account) together without a common identifier?	Q-1 The data sources listed in the graphic on page 19 of the RFI lists many of the most important. Refer to Part #5, the embedded Excel file in 1.) a. Interface-001 to Interface-025 for a complete list of those data sources. Any item tagged as HP (Highly Preferred) is a requirement Q-2 Unable to determine since we have not seen the structure of many of those databases Q-3 *(**Clarification:** Future BA system will have all accounts included; residential as well as non-residential.)* The common identifier is the premise number and associated DAP contained our billing system.
11	Dun & Bradstreet is listed as a current source of 3rd party, proprietary information. It is assumed that D&B information was provided in the BCD through City Light's former vendor, DMI, however there has never been a license agreement between D&B and DMI. Does City Light have information that indicates where D&B information may have been provided from?	We have no knowledge of what company provided the data or where the business-related data came from. "Great Value" is a Walmart brand but doesn't ring a bell with most consumers. But if we said "Kleenex" you would likely associate that brand with facial tissues. We are using "Dun & Bradstreet" like "Kleenex", as a generic term for business related data.
12	Per Part 3, number 7a (page 18), it is stated that Financial Planning & Rates is currently in the process of purchasing some of the information needed for Customer Analytics. Q-1 Is Dun & Bradstreet data one of the procurement options? Q-2 If so, is SCL working directly the D&B State & Local Government team? Q-3 If not, with whom? Working directly with D&B provides available API solutions that are batch/match and real-time opportunities and can be interfaced with any 3rd party software solution ultimately procured for the Building Analytics project.	**Clarification:** Part 3 describes the current state; the following answers relate to our current state not a future BA system. Q-1 No. Q-2 No. Q-3 Infogroup.
13	While this may be a recommendation for the actual RFI response, from a data perspective Q-1 would SCL have interest in data that provides risk/viability analytics at a building level based on businesses that occupy a particular building (regardless if they are a SCL customer or not) or Q-2 potentially a city block?	**Comment:** This is probably better addressed in a Vendor's response under Question 3., on page 8 of the RFI. That question covers value added services to the SOW that was published. Q-1 Possibly, but likely less interest if they are not the actual bill payer or building owner. Q-2 No.
14	Q-1 To confirm, a goal of the BA opportunity is to provide a means to recognize customers that may benefit from unique solutions based on building attributes as well as leverage same analytics to increase non-residential accounts? Q-2 Additionally, what information does SCL use to determine what businesses are resident in a particular building that are currently not customers of SCL (DMI?)? Q-3 Would a more	Q-1 Sometime in the future City Light may be interested customer solutions based on building attributes but that's not a focus currently. Do we want to increase non-residential accounts? No. We want to make existing customers more energy efficient.

	robust commercial data solution that describes businesses that are growing versus decaying, for example, improve new client acquisition strategies?	Q-2 We are a regulated monopoly, if they are in our service area they will already be a City Light customer. Q-3 No.
15	Will an attendee list be provided of those firms that attended the information session on July 20?	Yes.
16	Part 3 Current Conditions – 3a. Critical Data – you currently have ten users and there are no active stakeholders beyond your immediate work group. In Part 4 1.a.6 you identify that you would like to allow other City Light and City business partners to view and use the system. Do you have any estimate of how many additional users you would like to have use the system?	We anticipate an initial user group of approximately 100 users. About 60 of those users will be internal to Customer Energy Solutions, the other 40 users will be from the Account Executive office, Distribution Planning, Office of Sustainability & Environment, and Financial Planning & Rates.
17	What is the City's GIS or EGIS system?	A geographic information system (**GIS**) is a system designed to capture, store, manipulate, analyze, manage, and present spatial or geographic data. The City has an Enterprise GIS system that consolidates many of the individual departments GIS systems into a single solution.
18	ESRI?	Environmental Systems Research Institute or ESRI, is an international supplier of geographic information system (GIS) software, web GIS and geodatabase management applications.
19	I saw both RFIs had an awarded by date of 11/1/2017, so for the current contract on the Building Analytics System with Data Marketing, Inc., is that the timeframe when their current contract is set to expire?	The contract with Data Marketing, Inc. is closed and DMI no longer exists as a separate entity, it was acquired by Almaden Press. There is no relationship between the current RFIs, future RFPs, and Data Marketing, Inc.

July 20, 2017 RFI Information Session (IS) Questions		
IS-1	A number of universities are listed on the presentation and who is Brian Lines is also identified from the University of Kansas. Why they are here? And, why an RFI versus going straight to an RFP.	We'll introduce Brian Lines from the University of Kansas a little later in the presentation. And, these questions should be fully addressed as we move through this presentation. In short, Seattle City Light has hired Brian Lines with the University of Kansas to assist in implementing a Best Value Procurement process within the utility.
IS-2	When referring to building-related data, some of that data is static and some is dynamic—what is long term plan to keep data current? For example, uses in buildings could change over time.	We would update data file twice annually and make corrections as we move through time; we see the dataset as a living document. Try to keep data fresh.

IS-3	How does SCL currently collect dynamic data, how to keep data fresh?	For building-related uses – we rely on King County assessor's data. There are limitations to the current system because we received a new flat file every time the data was updated. Because we didn't have access to the source data, our corrections to data errors were never reflected, prompting us to re-correct the same problems repeatedly.
IS-4	Does SCL use the Commercial Building Stock Assessment data for the current dataset? (Data from the 2014 CBSA)	No – but this is our future vision. SCL has spent significant dollars on studies, evaluations, Commercial Building Stock Assessments, but data is not readily available. Ideally, the information would be tagged to the building.
IS-5	Capabilities to send data from King County Assessors – are there details to the file that is available from King County. Is this a flat file and how does this connection occur? It would be nice to know so that vendors could respond accordingly.	The PM doesn't know the details of this file available from King County Assessor. Don't know the details on how our current vendor pulls data from the King County Assessor. The current vendor connects with King County Assessor and pulls data twice a year. Would be great if we had a dynamic connection so data would be updated and we'd like to see that detail laid out in proposals/responses. Pat Campbell came back to this question and mentioned that he thought they have an open API for the King County Assessor data.
IS-6	You mentioned Benchmarking – would the new system integrated with the City of Seattle's Portfolio Manager system. Would you like to see that in the response?	Yes, we would like to see some sort of linkage functionality in a response. The City has their own Access database for the benchmarking effort and we see value incorporating the data from that system into our Building Analytics system.
IS-7	Why are we doing an RFI upfront? Why are there other university logos on the presentation slide?	We are going to talk about these questions as we go through the presentation. Today we will walk through the RFI process and preparing for the upcoming RFP process.
IS-8	Who these Universities are and why are they involved in this project?	Brian Lines: I'm from the University of Kansas and I'm part of a multi-university research consortium and for the last 20 years we've been trying to figure out the right ways to deliver projects and do that in a way that expert vendors like to deliver projects.

		Our research gets baked into the RFI and RFP process. We are helping SCL with this process.
IS-9	Why an RFI upfront?	The City hasn't done this type of project in a long, long time. We've tried to scope this out the best we can and we've attached that in the RFI, but need your input and your review of the scope before the RFP is released. Goal of the RFI is to equip vendors with the opportunity to put together an accurate proposal and plan with minimal contingency or uncertainty. Want to make sure that vendors have all the scoping information you need to minimize risk/uncertainty and put together a good proposal and plan.
IS-10	How is SCL project team planning to focus its resources across these two projects given that some individuals might work on both projects? How will SCL balance the need to implement both of these systems with the other work that it needs to get done?	Patrick: These two projects are operational critical for SCL and Seattle IT. We are in negotiations with SCL and Seattle IT go secure sufficient resource commitment to make sure these projects are successful. Brian: Vendors are experts – where have clients not provided resources – where did it go well. Gets clarified in Pre-Award Clarification stage of the Expertise-Driven Project Delivery process. This is your opportunity to specify needs and commit names and time commitments in contract.
IS-11	This is significant change in the RFP process for industry and client group. How long has this effort been under way with your group and SCL and how deep in organization does it go? Is this the first exercise? Are we jumping into a fire – or training exercise? What is Brian's long term involvement in this process?	This is the 2700th project going through this model and we've procured projects worth $11 billion. For us, this is not a new process. At SCL, we are into 18 months or almost two years into our contract. Brian and his research team's involvement is facilitating the procurement/scope development, procurement & selection, pre-ward clarification and performance metrics through contracting. (Brian referred to slide 4 and mentioned that they are involved in the entire process identified on the slide.) We are here to make certain the projects are success. Need to make certain vendors get what they need. There will be a pre-submittal

		conference to the RFP with more training. Make certain operations team attends. Usually ask weekly if we are doing things correctly and on track – 5-15 call
IS-12	After project is underway how do we manage change?	One – hopefully we are not missing anything major because we are going through this RFI process upfront. Two - We are attempting to minimize risk, uncertainty and change. In the pre-award phase, we will be working with vendor to identify risks and change– we will identify areas for deviation or change. There are usually very few surprises for change. Typically, don't seen unforeseen changes; however, if something does pop up unforeseen – changes will be dealt as with other projects in negotiating solutions. ne. same as always. However, if it hasn't been identified – it needs to be called out in t report and formal discussion ahead of time.
IS-13	Is the $850,000 for both projects?	There are scopes and <u>estimated</u> budgets associated with each project. The $850,000 is associated with the DSM project over a five-year period. The Building Analytics project has a two-year budget of $325,000. In the RFI process, we want to know if these budgets (and schedules) are realistic.
IS-14	A couple times in your presentation, you have used the phrase "if" SCL follows this process. What would cause them to not use this process?	At the time of the pre-submittal conference, there was uncertainty around the procurement mechanism; however, we now have confirmation that we will be using the expedited procurement process discussed at the meeting.
IS-15	If it doesn't go this full process what will this process look like?	After the session, SCL learned that it will be using this process.
IS-16	Fascinating good stuff Can you share metrics about success and failures with this model? What are the performance metrics?	We do close out evaluations are on all our projects. We are at 98% customer satisfaction. Where it hasn't worked is in the pre-award clarification. How often gotten to this stage and not awarded a contract? Approximately 18 out of 2,700 – about half are in IT – recognized that client did not accurately scope the project to meet their needs and the vendor backed out. In these IT examples, the project was canceled and

		went out to re-compete. The other 50% of the projects were construction-related and the client that did not have budget to proceed with plan.
IS-17	Related to the interview process: What is SCL's expectation of the time between interviews (and committing to specific people to the project) to the time when the project will begin. Will those people essentially be succumbent to the project? Brian recast this original question: It's difficult to lock down operation team members to participate in the overall process, before knowing if you got the project. And, there's a long waiting period. So, what is the schedule timeline for knowing who your team members are Clarifying question: After successful interviews, what is the duration of time until project starts? (Fine tuning of the evaluation schedule) Clarifying Again: Is it possible that named resources would become unavailable to the project during the time between pre-award and contract phase through to start of project?	We recognize the schedule is important to SCL and to vendors and we'll publish the overall schedule in the RFP. At the moment, here is the schedule (subject to change): RFP in mid- Sept Evaluation in October Interviews in October – early November Clarification process in November and hope to have that wrapped up right before Thanksgiving. We need you to commitment your named resources on the day you submit the proposal. Yes, named resources would be essentially sequestered to this project between proposal/interviews and the start of the project. We know it's a burden to have these resources on stand-by and that's why we're getting this message out and we'll get the schedule out with the RFP.
IS-18	For the demonstration of software, how can we demonstrate our product and honor the privacy concerns of the previous or existing systems (e.g., if showing a system built for other clients)?	You can set up a dummy project. There are a lot of ways this can be done.
IS-19	Delivering a product like this often requires a high level of configuration to ensure the product is optimized to meet a client's needs and match their operation. Different systems also have different levels of configuration agility. What is the expectation for demonstrations, given that we will likely be unable to perfectly configure our system to replicate City Light's needs, operations, and context?	You'll know from our base scope upfront what our main asks and expectations are—we aren't looking for an exact build of what it must be, only that you demonstrate the capability of your system to perform the tasks required. We acknowledge that what you demonstrate won't be optimized exactly as it could or would be in a final product that has been configured to meet City Light's specific needs. That is okay. You can provide commentary during the demonstrations, which can help caveat or explain alternatives means by which your system can be configured. Additionally, the RFI process gives us the chance to refine that scope a bit more with vendor input.