Cape Light Compact JPE RFP for Commercial Retrofit, Commercial New Construction and QA/QC Inspection services

Questions and Answers from the informational call (11/12 at 12 ET) and written submissions.

The call started at 12:02pm. The staff that joined were Margaret Song, Dan Schell, Tatsiana Nickinello and Lindsay Henderson.

There was a review of the schedule in the RFP and a note that any questions and answers as well as any changes to the schedule would be posted at www.capelightcompact.org. The schedule is currently on track, but any deviations would be distributed to those that have contacted the Chief Procurement Officer and posted on the website.

Please see the questions and answers below that were received in writing as well as verbally on the call. Any verbal questions are transcribed to the best of the ability of the staff and some of them are incorporated into other questions as they are follow-ups to written questions that were read aloud on the call.

1. What information and level of detail are required in the QA/QC inspection reports? Is there a sample template available for review?
    a. The Minimum Requirements Document (MRD) will typically serve as the primary document guiding the QA/QC inspection. The person performing the inspection will usually be provided all documents related to the project including the original application, any savings calculation documentation, invoices, and any other related documents.
2. Can you provide a sample of a Minimum Requirements Document (MRD)? What type of applications requires an MRD?
    a. A sample can be found here: https://www.masssave.com/-/media/Files/PDFs/Business/MRD-Statewide-Template-Example.pdf
    b. Most large commercial applications require an MRD including all custom applications and building management systems.
3. Which CLC/Mass Save programs may the projects requiring QA/QC inspections under sub-initiative B & C be participating through?

a. These projects are typically participating through the existing building retrofit program (to include large commercial and municipal buildings) and the New Construction/Major Renovations Commercial Program.

4. Do you anticipate QA/QC inspection scope overlap with the established technical services contracts under Mass Save? If so, how would they be differentiated?

    a. The purpose of this section of the scope was to A) allow locally based vendors who were not able to bid on the statewide technical services RFP to bid and in turn offer reduced travel costs B) allow for validation of equipment installation where engineering is not required, e.g. some smaller prescriptive offers. Current vendors under the statewide engineering services contract would still be able to provide those services. If vendors under the statewide contract are new to work with Cape Light Compact JPE, they are encouraged to reach out to efficiency@capelightcompact.org to introduce themselves. It should be noted, however, that that conversation cannot discuss this RFP as all communications should comply with public procurement laws.

5. What volume of QA/QC inspections is expected under sub-initiatives B & C? If possible, please break out municipal, large commercial, and commercial new construction (or any other applicable building type) quantities.

    a. Large Commercial: estimated at 5-15 annually

    b. Municipal: estimated at 30-50 annually

    c. New Construction: estimated at 20-30 annually

6. The RFP states that site inspections are typically required to be onsite, but there may be times when a virtual inspection is warranted. What circumstances may warrant virtual inspections, and what percentage of the site inspections do you anticipate potentially being virtual? Do you have a preferred virtual inspection approach (e.g. photo documentation, live video calls)?

    a. The preference will typically be in-person unless the application is simple enough and the cost savings are robust enough to make virtual appropriate. If virtual is authorized by Cape Light Compact, live video call is preferable. All inspections (in-person and virtual) should capture photo documentation of installed equipment including nameplates.

7. What type of meter installation(s) and on what type of equipment do you anticipate being part of the new construction program and project management support scope (sub-initiative B)?

    a. Although the customers are typically expected to install all metering equipment, the vendor's scope is generally limited to reviewing and analyzing

the metering submittals. On a rare occasion, however, the vendor may be requested to install additional data loggers if the customer-provided data is insufficient and requires additional validation. The systems subject to monitoring may include HVAC systems, lighting, demand control ventilation, and domestic hot water heaters.

8. Is there any indication of significant changes in programs for the new three year plan starting in 2028, that bidders should be aware of?

    a. For the sake of clarity, the Compact's current three-year plan is 2025-2027. There is a new plan that will be submitted in 2027 for the 2028-2030 term. There is also pending energy legislation that may introduce new elements of the plan or affect the planning in general. It is known that there is a focus on affordability and direct energy savings. Right now, it does not appear that anything dramatic will affect commercial and industrial customers, but there are no assurances at this time.

9. Can we add rows to the cost bid worksheet to account for different hourly staff rates for the prepopulated service categories in Column A (e.g. onsite visit), or do you prefer one blended hourly rate for each service category?

    a. Rows may be added to account for different hourly staff rates.

10. Please confirm that annual rate escalation is not allowed for the initial 3-year term.

    a. Correct, rates should be inclusive of all anticipated costs during a 3-year term and not include an annual escalation.

11. Please confirm that the pricing submission should include rates per category only or if a total budget price is required for the initial 3-year term.

    a. Pricing should be by scope as indicated in the pricing sheet. A total cost covering all scopes is not required.

12. Attachment A - Section 3. Services: The RFP's scope for Program and Project Management Support includes several services that are also regularly provided by approved Technical Assistance vendors. Will Technical Assistance vendors continue to provide these services moving forward (contracted by either CLC or the new Program and Project Management Support vendor)? Or, is the Program and Project Management support role intended to replace Technical Assistance services?

    a. Vendors currently contracted under the Mass Save Engineering Services contract will continue to be able to provide services under that scope as long as there is an active contract. Please see question #4 for additional detail.

13. Attachment A – Section 3. Services: Can vendors propose for a select sub-set of services under a given Service Category? Or, when proposing a given Service Category (e.g., Commercial New Construction Services), does the vendor commit to offering all sub-services outlined within that category in the RFP?

    a. Vendors should be able to complete all tasks within a specific subsection of the scope (i.e., Commercial Retrofit Services, Commercial New Construction, Commercial Retrofit QA/QC).

14. Question: Relative to Section 2. A. RFP Schedule. Given the schedule indicates Project implementation in early February 2027, and as an existing vendor under a contract through December 2026 that could provide for an extension, is the Compact considering any extension of existing vendor contract(s)?

    a. The question refers to a vendor that is currently contracted directly through a Cape Light Compact specific RFP for Commercial & Industrial Program Services that was originally issued in 2021 for services beginning in 2022. For applicable vendors where there would currently be a lapse in service based on contract dates, the Compact may elect to extend an existing contract.

15. Whether the separately provided Attachment-G-CI-Program-Services-Cost-Bid-Sheet is the Attachment G required for the Pricing Proposal under Section 7

    a. Yes

16. Whether the Confidentiality Agreement labeled Attachment G in the RFP PDF must be completed and submitted with the proposal or is required at another stage of the procurement/contracting process.

    a. No. It does not need to be completed for the bid package. Attachment F details the proposal checklist. Please be sure to follow that checklist and submit the checklist (Attachment F) itself.

17. Section 8(A) of the RFP states that "the proposal must be submitted as an electronic file in PDF format without the Pricing Proposal component." However, Section 6(F) states that "Proposer must provide a redline Microsoft Word version [of] Attachment B."

    a. Can the Compact supply a Word version of Attachment B to proposers? Although PDF to Word conversion is possible, sometimes formatting gets wonky and it would be best to work on this in an original Word format.

        i. Please refer to www.capelightcompact.org/rfp for the Word version of Attachment B.

b. Can the Compact please clarify if the final submission should have 3 total files: (1) A PDF of the proposal, (2) a Word document of the redlines VSA (if any), and (3) a PDF of the Cost Proposal.

    i. Please see Attachment F for the proposal checklist

c. If the Compact expects 2 files: (1) a PDF of the proposal and (2) a PDF of the Cost Proposal, please explain how proposers can submit Section 6(F) as a Word doc within a PDF.

    i. Please refer to www.capelightcompact.org/rfp for the Word version of Section 6 (F) which is Attachment B. You may submit this redlined Word document as a separate file with your submission. If additional files are needed, then please include them with clearly identified titles. There is no limit on the number of documents submitted as long as the cost proposal is fully separate and labelled appropriately.

18. Section 8(A) of the RFP states that "the Pricing Proposal must be submitted as a separate electronic file in PDF format." This pricing proposal uses Attachment G, an Excel spreadsheet. Would the Compact like the Proposer to PDF the Excel spreadsheet for submission, or would the Compact just want the Excel spreadsheet as-is in its current format?

    a. The Compact will accept the pricing proposal as an Excel spreadsheet.

19. Scope A: Will this vendor only support customers with energy consumption greater than 1.5M kWh?

    a. Customers with aggregated electric usage are categorized as large customers. There is a complementary small business turnkey model that is available to customers that are not categorized as large. There may be customers that send in applications that may be supported through this RFP, but the Compact will review and assign as needed.

20. Scope A: What measures are expected to be installed by the vendor?

    a. Measures to be installed through the Commercial retrofit program may include but are not limited to HVAC, air sealing and insulation, controls, refrigeration and other custom energy conservation measures.

21. Scope B: Does this scope include any design assistance consulting (i.e., energy modeling)?

    a. Yes, some energy modeling assistance may be expected under this scope. This RFP, however, is not intended to require the vendor to perform full-scale energy modeling, but rather, the vendor may be expected to review existing models,

assess model performance, and analyze results against actual building performance.

22. Scope B: How will this vendor interact with the Mass Save new construction program?

    a. Vendors are expected to work collaboratively with the existing contracted engineering vendors supporting the Mass Save New Construction Program. Existing contracted engineering vendors are expected to continue performing tasks and responsibilities outlined in their current contracts. This RFP is not intended to replace or duplicate those existing services, but rather to provide additional support and capabilities that complement and enhance the program's offerings.

23. Can the Compact confirm the program budgets and savings goals for each scope of the RFP?

    a. The 2027 budgets are below. The Compact is currently planning for the 2028-2030 planning term, and therefore budgets beyond 2027 are unknown at this time and are subject to approval by the Department of Public Utilities in early 2028. Scopes A and C would be paid out of the Existing Building Retrofit budget. Scope B would be paid out of the New Buildings & Major Renovations budget. Please note, there are additional expenses and contracts outside of the scope of this contract that are also billed against these line items.

Initiative	**Participant Incentives**	**Sales, Technical Assistance & Training**
C1a - C&I New Buildings & Major Renovations	163,724	180,085
C1b - C&I Existing Buildings	3,329,950	338,235

24. Can the Compact provide an average project size based on historical data for the Commercial Retrofit Program?

    a. Based on historic experience, a large number of projects would fall within the 20,000-30,000 sq ft or less category. While there are some larger outliers, particularly municipal buildings, which can reach up to 200,000 sq ft, the remaining retrofits would be expected to be under 100,000 sq ft. Because multiple vendors may be awarded Scope A, can the Compact please

describe how projects will be allocated among awarded vendors. Will vendors receive defined customer segments, geographic territories, rotating assignments, customer-selected assignments, or individual task/project authorizations? Is any minimum volume guaranteed?

b. The Compact's practice is to provide customers with a list of available vendors and allow the customers to select the vendor they wish to work with. No minimum project volume is guaranteed to any awarded vendor.

25. For vendors participating as subcontractors to a prime proposer, can the Compact please clarify whether the office, dispatch, warehouse, vehicle, hotline, centralized scheduling/calendar, and related local operational requirements may be satisfied collectively by the prime contractor and its subcontractors, or whether each subcontractor performing Scope A services must independently maintain these capabilities.

    a. The requirements may be satisfied collectively. Subs would not be required to meet those criteria if met by the prime.

26. Can the Compact please clarify how travel time, ferry fares, vehicle transport, parking, lodging, and other travel expenses associated with service to Martha's Vineyard should be treated in the pricing proposal. Should these costs be incorporated into hourly rates/project management fees, or may project-specific travel expenses be separately reimbursed?

All project costs including travel should be included in the pricing proposal. Travel will not be separately reimbursed. The Cape Light Compact JPE does not offer matching for subcontractors to connect with other potential bidders, but during the call, contact information was provided for an entity interested in being a potential subcontractor. The contact information is as follows, but any subcontracting relationship would be entirely up to the bidding team.

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