

Addendum No. 1

Date: **September 12th, 2024**

Re: **Energy Accounting and Reporting Software**

RFP No.: **125-14-9-25**

The following information becomes part and parcel of Request for Qualifications (RFQ) #125-14-9-25 effective this date. Firms must acknowledge receipt of this addendum in their solicitation response.

The listed items add to, modify, or otherwise alter the specifications and become part of the solicitation documents. Where a portion of the original specifications are added to, modified, or also altered, the portion not so affected shall remain. Firms may have the right to protest this addendum.

Proposal Opening Deadline Extension

The proposal opening deadline has been extended to October 9th, 2024 at 10:00AM EST.

Inquiries/ District Responses

Before the solicitation inquiry deadline of September 11th, 2024, the District received inquiries regarding this solicitation. The District's response to each question follows in **bold** font.

1. Can you provide an approximate number of active utility bill accounts that you track in your current system and plan to track in the new system? **A list of current active accounts and meters is attached. Worth noting is that many accounts like potable water will have an associated sewer virtual meter/account. Fire protection water accounts have no meter but are tracked for cost. Time of use electric meters will have two virtual meters each for on peak and off peak. Some utility providers bill multiple meters on one account.**
2. Do you intend to enter utility bills in the system manually or to have your software provider automate the bill entry process? **We foresee continuing to enter bills manually and gradually migrate toward automatic entry if the software will accommodate and if the utility provider has the option.**
3. Do you currently collect and analyze interval data and, if so, from how many meters and what sources do you collect this data (utility provided, BAS, etc.)? **We do not currently. We do plan on adding in the future. Initially, we would add all Duke Energy provided meters, then begin**

beta testing with third party installations and existing BAS. The goal would be to have all building main gas and electric meters collecting interval and real time data.

4. Do you currently load your data into a business intelligence tool such as PowerBI, Tableau, etc. and what method(s) do you use to load the data? **No. We are interested in exploring the various advanced opportunities and features different vendors can provide to enhance our Program.**
5. Does your system currently integrate with Microsoft SSRS or, if not, can you elaborate on why that tool specifically is needed or if another reporting tool is acceptable? **No. We are interested in exploring the various advanced opportunities and features different vendors can provide to enhance our Program.**
6. Is this RFP written for any specific vendor? **No.**
7. Regarding this requirement on page 9: "Company's main business is publishing this software. At least 50% of annual company revenues are derived from licensing and supporting this application." Would you elaborate on the purpose of this requirement? Would you consider vendors whose annual revenue from Energy Accounting and Reporting Systems is not more than 50% but rather who offer a holistic suite of facility, asset, and energy management solutions to K-12 institutions? **We would consider all proposals based on its own merit and an evaluation of the technical aspects of the software and cost to the District. All proposals will be evaluated and the most advantageous to the District based on the established criteria will be selected if within budget.**
8. How many facilities and utility accounts will be managed in the new system? **See attachment and inquiry no. 1.**
9. What is the format of utility bills? **Varies based on vendor. Some are downloaded from a web site, some are received via mail.**
10. Has the District participated in product demonstrations in the last 18 months? If so, which products did you see? **The District has conducted market surveys via third party consultant over the last three years. The purpose of these surveys has been to cast a broad net and develop an initial vendor list of minimally qualified vendors. It is anticipated that there may even be vendors that were not captured during these surveys. The District fully intends to short list the most advantageous proposals to this RFP and then make a final evaluation based on personal interviews and demonstrations.**

11. Does the District have a budget threshold for this project? If so, could you share your anticipated budget threshold? **Yes, there is a budget limitation that has been established based on the aforementioned market survey. This is not public information during the proposal process.**

12. Would the District consider extending the deadline by one week to allow vendors adequate time to incorporate question responses into our proposals if answers are not provided by the 13th? **Yes, the District will extend the deadline to October 9th, 2024 at 10:00AM EST.**

13. How many Interval Data Meters will be imported? Please provide a breakdown of meters, sub-meters, and BAS, along with their corresponding vendors.
 - a) If interval data does not come from a vendor, please provide the file format of the readings.
Please response to no. 3.

End of Section – Inquiries/District Responses

All other terms and conditions remain unchanged and in force.

Thank you for your interest in the District.

Matt Pettit
Director of Procurement