City of Seattle

REQUEST FOR INFORMATION (RFI)
Submittal Schedule

Event	Date
RFI Release date:	August 15, 2016
No Q&A Conference. Submit questions using email:	September 8, 2016 – 12PM PST
Answers to submitted questions:	September 12, 2016 – 12PM PST
Responses due date:	September 23, 2016 – 12PM PST

The City reserves the right to modify this schedule at the City's discretion.
Notification of changes in the response due date will be posted on the City website or as otherwise stated herein.

Submission and Contact Person

The Specifications Checklist must be submitted by hard copy or email to:
Kimberly Flin, Sr. Business Analyst, Seattle IT
You may submit your response to this RFI using the following methods:

Email	Fed Ex & Hand Delivery Physical Address	US Post Office Mailing Address
Kimberly.flin@seattle.gov	Kimberly Flin SCL Building Characteristics System 700 Fifth Avenue, Suite 3200 Mail Stop SMT 28-22 Seattle, Washington, 98104-5031	Kimberly Flin SCL Building Characteristics System PO Box 34023 Mail Stop SMT 28-22 Seattle, Washington, 98104-4023

This RFI is issued as a means of technical discovery and information gathering. This RFI is for planning purposes only and should not be construed as a solicitation nor should it be construed as an obligation on the part of the City of Seattle to make any purchases. This RFI should not be construed as a means to pre-qualify vendors.

From the information provided by the respondents to the RFI, a determination will be made regarding any actual contracting through a procurement process. Any future contract that may be awarded must comply with City procurement requirements. The City of Seattle may utilize the results of this RFI in drafting a competitive solicitation (RFP) for the subject services/products/equipment.

Participation in this RFI is voluntary and the City will not pay for the preparation of any information submitted by a respondent or for the City's use of that information.

1. Background and Purpose

The City of Seattle City Light Department (hereafter referred to as "SCL", "City Light", or "the City") is seeking information about software systems to aggregate business and project information for the Customer Energy Solutions (CES) department (hereinafter referred to as "Building Characteristics System").

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Based on the information provided by the respondents to this RFI, a determination will be made regarding any actual contracting through a procurement process which, at the City's option, could include but not be limited to: a formal bid process, using an existing City contract, procurement via Federal GSA contract(s) or a piggyback of a contract established as a result of the public bid of another public agency.

Participation in this RFI is voluntary and the City will not compensate for the preparation of any information submitted by a respondent or for the City's use of that information.

The Building Characteristics System (BCS) will be used to aggregate business and project information for Residential, Commercial and Industrial customers. This will include a database that has a user friendly interface, easy search, multiple user views and report capabilities and is also able to analyze and correct the underlying data.

2. Department and Project Overview

Seattle City Light is the tenth largest public utility in the U.S. and recently ranked #1 in business customer satisfaction among midsize utilities in the west by J.D. Power and Associates. City Light performs electrical power generation, transmission, and distribution to residential, commercial, and industrial customers in the Seattle area.

City Light has been greenhouse gas neutral since 2005, the first electric utility in the nation to achieve that distinction. City Light has a 37-year history of innovation in energy conservation programs and was the first utility in the country to include conservation as an energy resource. Since the mid-1970s, City Light has saved more than 17 million megawatt-hours of energy – enough electricity to power the households of five cities the size of Seattle for a year.

To fulfill its mission, the 90 employees at City Light's Customer Energy Solutions (CES) Division provide a full-range of energy efficiency services to their customers. City Light values energy efficiency as purchases of energy from our customers and as equivalent to resource generation. CES develops programs for commercial, industrial and residential customers, in addition to incentives for renewable energy development. More detailed information on these programs is available online at: **http://www.seattle.gov/light/conserve**

The Customer Energy Solutions team spends approximately 15% of their time manually developing and updating information about buildings, completing energy analysis audits and energy efficiency projects. Currently information is housed in several electronic and paper based systems, impacting City Light's ability to respond to internal and external requests for information and requiring greater resources to manage happenings. This viable, valuable information remains stranded and isolated within project specific documents stored on network drives or on paper in file cabinets and is not available internally or to external business partners.

The City has contracted with a third-party consultant to aggregate business and project information for all non-residential customers for the past six years. The resulting file proved extremely valuable in segmenting business customers, however this was not a database and provided no easy method to search, view, analyze or correct data.

The Planning and Analytics team is interested in developing a centralized, automated system to serve as the source record for all premise characteristics, firmographics, and demographics. This information will be used to provide a single, searchable database that acts as a one-stop-shop for data regarding; buildings, parcels, energy usage, conservation program participation, customer analytics, and how those relate to one another. Customer demographics and analytics will also be stored and related to a building via the Discrete Address Point (DAP) for all of City Light's current customers; approximately 375,000 residential accounts and 40,000 non-residential accounts.

City Light seeks to learn more about the types of systems available to easily extract information from a web-based system that would house the assorted building and customer data. The proposed solution will act as the system of record for all building related data. This system would 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. Ideally CES users would like to be able to drag and drop objects for report and query generation from user interface. Due to the highly sensitive data the system would support a high degree of security and integration with external data sources, such as King County Assessor, Enterprise GIS, Office of Housing, U.S. Census data, and various public and private low-income housing organizations.

3. Objectives

3.1 Provide Customer Energy Solutions with one-stop shop for data regarding; buildings, parcels, energy usage, conservation program participation, customer analytics, and how they relate to one another.

- Ability to act as a database for the building entity
- Ability to identify physical characteristics dynamically
- Ability for software to be highly adaptive, modular and flexible
- Ability to export and interface with third party graphics and analytical packages such as Tableau or SAS
- System should be highly adaptive, modular and flexible
- System would ensure clear and secure metadata repository
- Ability to identify past CES program participants
- Ability to provide updates or corrections to data during on-site visits
- Provide audit log or history noted when fields are populated or changed
- Ability to relate all data to a building via the Discrete Address Point (DAP) and/or latitude/longitude
- Ability to create ad-hoc reports.

3.2 Provide better tools for Program Planning efforts for proactive response when determining the program or measure penetration within a building segment. The subsequent information would be used by other consultants in determining the remaining conservation potential within that building segment.

- Identify and classify buildings with schema based on County Assessor data
- Provide market characterizations of various building segments such as number of buildings, square footage, age, predominate type of heating/cooling systems
- System would be able to identify customers with third party billing
- Display seasonal profiles based on kWh consumption
- Record the number of occupants and identify owners from tenants
- Use or integrate other data sources to identify underserved and low-income customers.

3.3 Provide Field Operations staff with a resource that allows them to quickly discern the physical characteristics of a building and whether or not they have participated in CES programs. If past participant, system would be able to identify what projects were done, when were they done, and what energy conservation measures were installed at the time.

- List building characteristics, past program participation, and review three-year history of energy use
- List building information including but not limited to; age, remodel history, square footage, type and square footage of building sections, premise history
- Use targeted CRM fields, to find out who is the owner, tenant, building manager, building engineer, and review any ongoing projects, or look to see what future plans or issues
- Staff will look at the kWh and KW usage analytics, building analytics, benchmarking score, and a number of graphs using calculated variables based on billing data

- Staff will use BCS as a lead source for future projects by searching for high usage customers that are non-participants.

3.4 Provide an analytical resource to gain insight on Seattle City Light customers. Allow to identify, develop and manage data to create customer profiles to gain insight and predict behavior from their data. Ability to create mailing lists and target untouched customers to develop new projects.

- Ability to create, generate and export mailing lists
- Analytic ability to determine which customers use electric heat
- Ability to identify low-income potential qualified customers
- Ability to use local weather data to normalize kWh usage to the outside air temperature and provide graphs of annual normalized kWh usage
- Run a billing analysis to identify all customers/buildings that appear to be using electric as their main source of heat
- Ability to use billing information to provide energy use profiles graphs; average energy use, highest/lowest energy use, EUI/S.F., and any seasonality in usage
- Ability to extract customer and building characteristics in reports and diagrams
- Ability to run comparison reports on buildings with similar systems, past performance versus performance today, and buildings that have implemented similar energy conservation measures
- Ability to run seasonal Energy Utilization Index (EUI).

3.5 Provide better customer service to CES internal and other City departments by creating a holistic view of building and customer history.

- Ability for up to 20 users to be logged in and working at the same time
- Ability to access remotely BCS via tablets or smart phone using the City's Environment Systems Research Institute (ESRI) portal
- Ability to upload and store photographs pertinent to building sub-systems and equipment
- Ability to display Google Earth and street views
- Ability to capture building photos from the County Assessor's site
- Ability to access 15-minute interval data from AMI meters
- Ability to link to local weather data
- Ability to store and access energy audits or energy analysis reports for that building.

3.6 Integrate multiple external building, project, and customer information sources into a single resource that may later feed or be housed in subsequent systems such as; Customer Care Billing System and a future CES Program and Project Management module.

- Ability to interface with Seattle City Light's Customer Care and Billing System (Oracle)
- Ability to interface with Environment Systems Research Institutes (ESRI) Geographic Information System (GIS) software
- Ability to upload with proprietary databases that have individual customer information such as Office of Housing's HomeWise program, Human Services Utility Discount Program, Experian's Financial Assistance CheckerSM score
- Ability to upload with many third-party program databases such as; United States Census data, Tendril, OPower, Energy Savvy, Optics, Ecova, PECI – Retail Washwise or others.

4. Request for Information (RFI) Process and Instructions

If you have a product that you feel will meet these needs complete and submit, Attachment A, Specifications Checklist. The City, at its sole discretion based, on the information provided on the Checklist, ask certain vendors to also provide a Vendor Presentation.

Vendor Presentations will allow both the Steering Committee and the Stakeholder group to learn of the options available in the market for these Leave and ADA Management products, and to begin to envision how any of these products can be integrated into our environment.

If vendors are requested to provide a Presentation, the City anticipates that Presentations will be scheduled for 90 minutes (60 minute presentation, 30 minutes Questions and Answers), and should effectively demonstrate the objectives outlined in Section 3, Objectives.

Registration into City Registration System

The City requires all firms to register. Women and minority owned businesses are asked to self-identify. If you have not previously done so, register online at City of Seattle Online Business Directory https://web6.seattle.gov/FAS/OBD/NewRegistration.aspx/. For assistance call (206) 684-0444.

Questions and Answers (Q&A) Conference

The City is not scheduling a Questions and Answer conference call or meeting. Respondents are invited to send all questions or requests for additional information to the City's Project Manager at 12:00PM (noon) Monday, September 12, 2016.

Questions

Respondents can submit written questions by e-mail only, to the **Project Manager:**

Name: Kimberly Flin, Sr. IT Business Analyst

E-Mail: Kimberly.Flin@seattle.gov

It is the responsibility of the interested Vendor to assure that they received responses to questions if any are issued.

Amendments to original RFI

Any addenda and notices will be posted on the City's website at: http://www.seattle.gov/purchasing/. The City will make efforts to provide courtesy notices, reminders, addenda and similar announcements directly to any interested vendors known by the City. Notwithstanding efforts by the City to provide such notice to such known vendors, it remains the obligation and responsibility of the Vendor to learn of any addenda, responses, or notices issued by the City. Such efforts by the City to provide notice or to make it available do not relieve the Vendor from the sole obligation for learning of such material.

Liabilities of Agencies

This RFI is only a request for information about potential products/services and no contractual obligation on behalf of The City of Seattle whatsoever shall arise from the RFI process. This RFI does not commit the City of Seattle to pay any cost incurred in the preparation or submission of any response to the RFI.

Response: Hard Copy or Email Submittal

Vendors must ensure the completed Specification Checklist is to the Project Manager no later than the date and time given on Page one; Tuesday, September 23, 2016, 12:00PM Pacific Standard Time.

The Subject Line of your email should be "**Building Characteristics System**". This is important to insure proper handling of your response.

Vendors are invited to attach any brochures or materials that will assist the City in understanding their product.

Upon receipt and review of the Specifications Checklist, the City will inform those Vendors that the City wishes to invite to make a presentation, and provide a scheduled time.

A. Vendors invited to make a presentation will be able to use the audio-visual equipment, including data projectors, screens and an internet connection provided by Seattle City Light. Vendors will be expected to provide their own computers for the presentation.
B. The presentation will be made to approximately twelve people, and should be less than two hours in length, allowing 30 minutes for questions and answers.

Cost of Preparing Submittals

The City will not be liable for any costs incurred by the Respondent to prepare, submit, and present Submittals, perform interviews and/or demonstrations.

Proprietary and Confidential Material

By submitting a response, the Respondent agrees that the City of Seattle and its member agencies may copy and distribute the response, in whole or in part, for the purpose of facilitating the review of the response. The Respondent consents to such copying by submitting a response and warrants that such copying does not violate the rights of any third party. By submitting one or more responses, the Respondent thereby grants the City of Seattle and its member agencies the right to use the ideas and to adapt or modify the Respondent's ideas, which are contained in the response.

5. Confidentiality and RFI Ownership

All responses to the RFI will become the property of the City of Seattle and will not be returned.

The State of Washington's Public Records Act (Release/Disclosure of Public Records)

Under Washington State Law (reference RCW Chapter 42.56, the ***Public Records Act***) all materials received or created by the City of Seattle are considered ***public records***. These records include but are not limited to bid or proposal submittals, agreement documents, contract work product, or other bid material.

The State of Washington's Public Records Act requires that public records must be promptly disclosed by the City upon request unless that RCW or another Washington State statute specifically exempts records from disclosure. Exemptions are narrow and explicit and are listed in Washington State Law (Reference RCW 42.56 and RCW 19.108).

Respondents must familiarize themselves with the Washington State Public Records Act and the limits of record disclosure exemptions. For more information, visit the Washington State Legislature's website at http://www1.leg.wa.gov/LawsAndAgencyRules).

Marking Your Records Exempt from Disclosure (Protected, Confidential, or Proprietary)

As mentioned above, all City of Seattle offices ("the City") are required to promptly make public records available upon request. However, under Washington State Law some records or portions of records are considered legally ***exempt from disclosure*** and can be withheld. A list and description of records identified as exempt by the Public Records Act can be found in RCW 42.56 and RCW 19.108.

If you believe any of the records you are submitting to the City as part of your informational material are exempt from disclosure, you can request that they not be released before you receive notification. To do so, you must complete the City Non-Disclosure Request Form ("the Form") included below. You should very clearly and specifically identify each record and the exemption(s) that may apply.

Non Disclosure Request Form .doc

The City will **not** withhold materials from disclosure simply because you mark them with a document header or footer, page stamp, or a generic statement that a document is non-disclosable, exempt, confidential, proprietary, or protected. Do not identify an entire page as exempt unless each sentence is within the exemption scope; instead, identify paragraphs or sentences that meet the specific exemption criteria you cite on the Form. Only the specific records or portions of records properly listed on the Form will be protected and withheld for notice. All other records will be considered fully disclosable upon request.

If the City receives a public disclosure request for any records you have properly and specifically listed on the Form, the City will notify you in writing of the request and will postpone disclosure. While it is not a legal obligation, the City, as a courtesy, will allow you up to ten business days to file a court injunction to prevent the City from releasing the records (reference RCW 42.56.540). If you fail to obtain a Court order within the ten days, the City may release the documents.

The City will **not** assert an exemption from disclosure on your behalf. If you believe a record(s) is exempt from disclosure you are obligated to clearly identify it as such on the Form and submit it with your solicitation. Should a public record request be submitted to the Department of Finance and Administrative Services for that (those) record(s) you can then seek an injunction under RCW 42.56 to prevent release. By submitting a response to this Request for Information, Respondent acknowledges this obligation; and also acknowledges that the City will have no obligation or liability to the proposer if the records are disclosed.

By submitting, the respondent acknowledges the obligation to identify such records within the responses and that the City has no obligation or liability to the Respondent if the records are disclosed.

Ethics Code.

Please familiarize yourself with the City Ethics code found online at: http:/www.seattle.gov/ethics/etpub/et_home.htm. Attached is a pamphlet for Consultants, Customers and Clients. Specific questions should be addressed to the staff of the Seattle Ethics and Locations Commission at (206) 684-8500, or email:

Executive Director, Wayne Barnett, wayne.barnett@seattle.gov or

Staff members Kate Flack, kate.flack@seatle.gov and Mardie Holden, mardie.holden@seattle.gov.

contractor-vendorbrochure[1].pdf

No Gifts and Gratuities

Respondents shall not directly or indirectly offer anything (such as retainers, loans, entertainment, favors, gifts, tickets, favors, bonuses, donations, special discounts, work, or meals) to any City employee, volunteer or official, if it is intended or may appear to a reasonable person to be intended to obtain or give special consideration to the respondent.

The rule works both ways, as it also prohibits City employees from soliciting items from respondents. Promotional items worth less than $25, may be distributed by the respondent to City employees if the respondent uses the items as routine and standard promotions for the business.

Involvement of Current and Former City Employees

The City Ethics Code has limits as to involvement of current or former City employees, official or volunteer, that is working or assisting in your response. Become familiar with those requirements. For questions, contact the Ethics and Elections Office (see contacts above).

No Conflict of Interest.

Respondent (including officer, director, trustee, partner or employee) must not have a business interest or a close family or domestic relationship with any City official, officer or employee who was, is, or will be involved in selection, negotiation, drafting, signing, administration or evaluating Respondent performance. The City shall make sole determination as to compliance.

Attachment A

Seattle City Light Building Characteristics System Specifications Checklist

Please complete this form and submit, via email or hard copy, as instructed on Page one, by **12:00 PM Pacific Standard Time (noon), September 23, 2016**.

Vendor Information	
Question	**Response**
Company Name:	
Product Name:	
Webpage:	
Contact Name:	
Contact Phone:	
Contact Email:	
Have you implemented your system with any other utilities? If so, please provide reference information.	
Was your software written by your organization or acquired from a third party?	
Describe any third party alliances, relationships, or dependencies.	
Provide typical implementation timeline.	

System, Infrastructure and Support	
Question	**Response**
Is the application desktop or web-based?	
What are the type and complexity of system administration roles?	
What would be the technical administration requirements for City Light?	
Is the product accessible from the internet? If so, what is required to deliver it?	
Will the product work from a mobile device? Define limitations such as OS and functionality differences from desktop clients.	
Does your system provide API's?	
Is there anything that would require an additional or third party purchase for this product?	
What type of training is offered?	
Describe any training materials provided.	

Product Features	
Is this system:	**Response**
Ability to act as a database for the building entity.	
Ability to create, generate, and export mailing lists.	
Ability to identify past energy program participants.	
Ability to upload photos pertinent to building sub-systems and equipment.	
Ability to display Google Earth and street views.	
Ability for software to be highly adaptive, modular, and flexible.	
Ability to export and interface with third party graphics and analytical packages such as Tableau or SAS.	
Ability to use multiple variables to segment customers for analysis or mailing purposes.	
Ability to define multiple user roles and security levels.	
Ability for user to customize displays and graphs.	
Compatible with City Enterprise GIS system.	
Ability to link to multiple data sources.	
Ability to create building profile dashboards with; number of stories, square footage, construction type, type and SF of uses/sections, type of heating and cooling system.	
Ability to interface with the Oracle based Customer Care and Billing system.	
Possess a robust interface for integration to other data sets.	
Ability to integrate with dynamic mapping solutions such as City Light Enterprise GIS.	
Ability to interface with ESRI.	
Determine and classify building types based on County Assessor information into one of 39 Residential, Commercial, or Industrial building types.	
Ability to list all the energy measures installed in a building as text and a timeline graph.	
Ability to populate and edit HVAC system type field (building, dwelling units, or MF common area) from Assessor or Benchmarking data, provide fields for spaces served.	

Product Features Continued	
Ability to populate and edit fields for building contacts; name, title, company, phone, and email for main building contact, owner, authorized contract signer, building manager, and engineer.	
Ability to store notes (a modest CRM field) for EMA’s to record customer comments, future plans, site visit comments, etc.	
Ability to record building contact information such as; owner, tenant, building manager, building engineer.	
Ability to use local weather data to normalize kWh usage to the outside air temperature and provide graphs of annual normalized kWh usage.	
Ability to use billing information to provide energy use profiles graphs; average energy use, highest/lowest energy use, EUI/S.F., and any seasonality in usage.	
Ability to run comparison reports for buildings with similar systems.	
Ability to record all program participation; CRD or external entities.	
Ability to record and group all businesses in building.	
Ability to group all like businesses (e.g. all McDonalds restaurants regardless of ownership).	
Ability to use analytics to determine if customer uses electrical heat.	
Ability to search for customers that have user selected variables.	
Ability to recognize residential use (high) and see what data correlates with usage.	
Ability to determine tenant vs. owner vs. bill payer relationships.	