



Request for Qualifications

Consortium for Energy Efficiency Content Management System

EXPRESSION OF INTEREST DUE BY
Monday, April 13, 2009 5:00 PM EDT

Introduction

The Consortium for Energy Efficiency, a 501(c)3 organization of energy efficiency programs in the United States and Canada, was started nearly twenty years ago. Energy efficiency programs, run by ratepayer funded public and private entities, benefit the public by lowering energy costs to consumers and by reducing greenhouse gas emissions. CEE has grown from seven founding utilities to over one hundred organizations today. Some examples of our members are Pacific Gas and Electric (an investor-owned utility), Vermont Efficiency (a regulatory commission chartered program charged with reducing energy demand for the state of Vermont), and Gaz Métro (a Canadian gas distributor). We expect that we will grow rapidly over the next five years.

To help meet this growth and to improve collaboration and coordination among our members, CEE is seeking an IT consulting company to help us implement a content management system customized to meet our detailed requirements. We have developed a detailed requirements document and a database design, and we have a local IT Consultant to help us manage the process. We are looking for an experienced and effective development partner.

Architecture

The Content Management System is used to create and manage documents. The CMS includes features to manage users and their access privileges and offers a workflow for creating and publishing content. In the case of CEE, users include CEE staff, users from member organizations, along with the Web-browsing public, among others. Content includes static Web pages, easily updated content like News items, and dynamic content, like users having a threaded discussion about a Committee topic. There is a need for add-on modules for the CMS that will include contact management, calendar management, event and meeting management, threaded discussions, etc.

Structured document types that we have identified to date are for energy efficiency program summaries, product information, and lists of products.

The information technology infrastructure has a relational database integrated with a content management system. Primary entities in the database include organizations, individuals, committees, and energy efficiency programs. We have a relational database design.

Finally, there are some areas of functionality that are unique to the needs of CEE and will require custom programming. For example, submitting products and associated documentation and

organizing them into approved Qualified Product Lists. Another example is a report that shows for a member organization their employee's participation in all of the CEE Committee Work.

The Development Environment is under the control of CEE staff and is meant to implement and test functional changes before they are publicly deployed. Once a set of functional changes has been tested, an automated process will promote the changes to the Production Environment. CEE needs simple tools and scripts to perform administrative tasks, such as backing up the source code and data, promoting functional code to production, taking a snapshot of data and documents from the Production Environment, restarting the services, etc.

Note that specific recommendations for layout and look and feel would come from CEE communications staff.

User Stories

These User Stories provide a feeling for how people will interact with the new IT system. We will provide detailed requirements document and a database design to qualified respondents.

At 8:00 AM, Abby Liance, CEE staff co-chair for the residential appliances committee, arrives for work. When she logs into her work area on the extranet, she sees that three manufacturers have updated their compliant product lists. Doing a simple search by manufacturer name and date of change, she brings up the change list for each company to check the information for each product before allowing them to be visible to CEE members and manufacturers. Two look fine, and she approves them, but she has a question about one of the dishwashers. Flagging that item on the list, she sends her question back to her contact at the manufacturer.

Meanwhile, Carl Manhoff, CEE recruiting assistant, arrives. He wants to find out more about who's in charge of efficiency at Maritime Electric, a Canadian electric utility who has not yet joined CEE, before making a call to them. He has a contact name given him from one of our members in Nova Scotia, so he looks it up via a Web form that queries the database. Sure enough, he can see that this woman was hired away from Efficiency NB. Great, he thinks, she will at least have heard of us. Before calling her, he makes a quick call to another contact at Efficiency NB to find out what Maritime Electric is thinking about efficiency, given that they are so heavily invested in wind power.

Tanya Lightoff, an efficiency program administrator at one of our member organizations, San Diego Gas and Electric, had initially been skeptical about the new CEE IT system, however, after working with CEE staff to help design and test the user interface, she appreciates the fact that she can read through other member's comments and compose her own responses in addition to participating in the monthly committee phone calls. She likes the easy access to old meeting notes and resources that help her with her work.

Carbona Oxhide, staff co-chair of the CEE gas committee, checks into her committee work area to see if any west coast members responded to a proposed ENERGY STAR change to gas furnaces last night. Both the proposed change from ENERGY STAR and the CEE draft response are posted in her work area, which she moderates, with comments below. Most of the comments are good contributions to the discussion, but there is one incendiary post and one where the math

doesn't make sense. Carbona releases all but the last two for users to view with plans to respond directly to the senders of the last two.

"Hmm, need to get the agenda together for that call," Carbona muses. Based on the comments she's viewing and points she wants to make, she posts the agenda and call time and number for a conference call on the CEE calendar. In addition to marking the event for gas furnace committee members, she opts to send out an automatic e-mail notification with the link to the extranet. Quickly she generates an attendance report to see who's been participating regularly.

Meanwhile, Bryan Boyler at Ace Manufacturing knows that ENERGY STAR has proposed changes that will affect one of his top selling products, but it all depends on what the powerful CEE membership thinks. He can visit the current initiative description, lists of qualified gas furnace products, and search program summaries, but he doesn't have access to the entire work area where the DOE comment letter is being edited by members. Instead he sends Carbona an e-mail, with a few ideas of his own.

Liza Round, our events coordinator, finds it's time to set up a new event—a program meeting for all members in San Francisco. On her event authoring page, she sets up the date, time, and location among other fields. Once it's set, she can post it to the external Web in the calendar and also to the descriptive meetings list. As the agenda develops, she'll add additional information to the event that allows registrants to choose breakout sessions.

Member participants log in to register, and verify their contact information. If there is information missing, such as job title, allergies, or meal preferences, they can edit their profile as they register. In addition, they can check off days attending and breakout sessions preferred at this particular program meeting. Others request phone access to a meeting. When they have successfully registered, the system sends an automated confirmation listing the meeting choices they made. There is no registration charge to attendees.

As the meeting date approaches, both Liza and CEE staff can look at reports that show which members are sending individuals and which breakout sessions are filling up. Using these findings, they can make personal calls and e-mails to missing members or to promote specific breakout sessions.

Promotion is also targeted. Liza uses Constant Contact to send out a save-the-date e-mail to a general membership list followed by the actual invitation. Links on the invitation open a page on the Web site with a preliminary agenda. Members can view meeting details.

The data proves invaluable in managing the meeting. A special report prints meal counts with preferences to send to the hotel ahead of time. At the registration table, Liza pulls out her laptop and checks people in as they arrive.

Speakers e-mail their presentations to Liza. After the meeting, Liza loads the presentations in the meeting archive. Along with meeting notes, member participants now have access to everything that transpired at that session.

Evaluators are another group that appreciates the new technology tools. Instead of calling or e-mailing the evaluation committee staff co-chair, evaluators can quickly find what they need in the Clearinghouse. For example, Otis S. Hard works for a member organization that is evaluating a new industrial motors program. In the Clearinghouse, he searches for documents created in the past three years, industrial motor programs, United States only, then checks processes, findings, and market characterization. Voila! Ten useful documents appear in a window, where he can sort by date of publication.

Shanda Lear is the staff co-chair for the residential lighting committee, a very popular area due to the ongoing, cost-effective savings available to efficiency program administrators. A new member needs information about this area, but instead of calling Shanda, her coworker shows her how to go directly to the residential lighting section of the extranet. When she clicks Meeting Notes, she gets a page listing meeting notes. Trying the subject search, she immediately brings up the discussion regarding CFL shipment data.

Scope of Work

The selected vendor will work closely with CEE as follows:

1. Recommendations: Recommend specific technology components required by the architecture above, including CMS, specific add-ons, RDBMS, custom programming, servers and hosting.
2. Project Plan: Propose a development and deployment budget and schedule based on the detailed requirements document. In the absence of a functional specification, release periodic prototypes to the client.
3. Development: Build out the system according to the requirements document and other CEE specifications and guidance.
4. Usability – Work with CEE Staff to develop and implement a consistent graphic page design and an effective site design and flow.
5. Training and Documentation: Propose services to train CEE staff, develop user-friendly documentation and training materials for users and administrators.
6. Conversion and Implementation: Convert existing Web and electronic documents for the new system. Setup initial users and workspaces.
7. Launch the new system.
8. On-going Maintenance and Support: Specify rates, costs, and options associated with maintenance and support.

Vendor Characteristics

We will qualify respondents according to the following criteria:

- CMS Experience—Your experience installing/customizing a CMS.
- Custom Web Application Experience—Your experience customizing a vanilla CMS with add on modules/custom development.
- Operations Experience—Your experience operating/maintaining a CMS for a client over time.

- Database and Reporting Experience—Your experience with database design, implementation, support, and custom reporting.
- Usability/Graphics/Design—Your experience extending a brand throughout a Web site and designing apps that look good, work well, and are easy to learn and use.
- Project Management Experience—Your experience meeting milestones and cost estimates. No surprises!
- Location—Proximity to Boston preferred, but not required.
- Sympatico chemistry with CEE

Contact Us

If you are interested in working with us on this project, please provide a description of your firm, a brief summary of your initial approach to this project, and references from at least three projects in which you have developed and maintained similar systems.

For qualified respondents, we will ask you to sign a confidentiality agreement, then we will provide a detailed requirements document and database design for a firm cost and schedule proposal. Qualified respondents will receive the RFP package by May 1.

We would like to receive specific proposals by June 1, with a final selection made and agreements signed by July 3.

If you have questions at any point in the process, use the e-mail address below or post to the group: <http://groups.google.com/group/cee-it-system>

Please send your indication of interest and questions to CEECoreIT@gmail.com. No phone calls or faxes, please.

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