1. As we review the components of the proposal, there are a few questions we would like to ask. First, you state that the STEP-UP programs will be expanding into additional small towns. Will these towns be seeking their own DOE Better Buildings Neighborhood grants or is their funding already secured? FUNDING IS SECURED THROUGH OUR CURRENT GRANT

2. Second, in considering the economies of providing similar services across several programs, will these communities be releasing RFPs for planning, marketing, or evaluation in the near future? NO. WE WILL BE DELIVERING THE SERVICES IN THE NEW COMMUNITIES ON THEIR BEHALF THROUGH THIS AWARD

3. Finally, can you provide any range of budget or budget ceiling estimated for this current RFP based on the specific tasks requested? WE INTENTIONALLY HAVE NOT PUT A RANGE IN THE RFP, WE WANT TO SEE WHAT WE GET BACK. IF YOU ARE USING THE x% OF AWARD FOR EM&V METRIC, OUR AWARD WAS $1.4 MILLION.

4. I hate to bother you again, but is the expectation that the proposal be based only on the current UP program that is up and running, or that it should include the other five communities. Starting near the bottom of page 3 of the RFP, it summarizes what we are looking for, which is a combination of both things: to analyze some of the data (already collected) for the UP program, and to help us set up the analytical framework for the communities into which we plan to expand.

5. This is an exciting opportunity and great new knowledge can come from this (both for the program and for the general public). Since there is no budget specified in the RFP, can you please provide any guidance on the evaluation budget and how we should balance the depth/rigor of the potential research against your budget expectations? WE INTENTIONALLY LEFT THE BUDGET BLANK SO WE COULD GET A SENSE OF WHO IS OFFERING COMPETITIVE PRICES. HOWEVER, IN TERMS OF BALLPARK, IF YOU THINK IN CLASSIC EM&V TERMS OF X% OF TOTAL PROJECT COST, OUR TOTAL PROJECT BUDGET IS $1.4 MILLION.

6. In reference to Task 4.4.b, what data do you currently have? Can you please describe in more detail the three-tiered survey? What questions were asked? Who implemented the survey (third party or internal to STEP-UP)? WE HAVE DATA ON CLIENT'S EXPERIENCE WITH THE AUDIT, RETROFIT AND OVERALL PROGRAM (THE 3-TIERS). WE ASKED THE QUESTIONS OF ALL PARTICIPANTS, AND WITHHELD THEIR FINAL INCENTIVE PAYMENT UNTIL THEY HAD SUBMITTED ALL DOCUMENTATION. THERE WAS ONLY ONE OPEN-ENDED QUESTION PER SURVEY, ALL OTHERS ARE SCALED OR NUMERICAL.

7. What is the intended use of the database referenced in 4.5, particularly in reference to linkages with GIS and statistical software packages? WE JUST NEED TO BE ABLE TO LOOK AT A SINGLE CLIENT RECORD AND SEE ALL THEIR DATA (CURRENTLY IN EXCEL), AND THEN MANIPULATE, CROSS-TAB AND CREATE SOME STANDARD REPORTS. THE GIS IS A NICE TO HAVE, NOT A NEED TO HAVE.

8. Are the other 5 communities decided upon? What are their populations or number of households? YES, FOR THE MOST PART THE TOWNS ARE DECIDED UPON. THE TOWNS WILL BE COLLEGE HEIGHTS ESTATES, HYATTSVILLE AND RIVERDALE PARK. POPULATIONS RANGE FROM 1,000 – 15,000.

9. Are you currently tracking energy savings per participant household or would the evaluator be responsible for developing an approach for acquiring utility usage data? A CONDITION OF

PARTICIPATING IS ALL HOMEOWNERSE SIGN A RELEASE THAT WE CAN ACCESS A YEAR OF USAGE HISTORY AND A YEAR FROM RETROFIT OF USAGE DATA. WE HAVE MOST IF NOT ALL OF THE USAGE HISTORY, AND CLIENT PERMISSION TO GET THE NEXT YEARS WORTH OF THEIR DATA. WE JUST HAVEN'T ACTUALLY REACHED OUT TO THE UTILITY TO GET IT YET.

10. Can you please clarify what should be included in the 10-page limit for the proposal? Do resumes or samples of evaluation materials belong in the proposal or in the attachments? RESUMES AND SAMPLE MATERIALS ARE ATTACHMENTS.

11. Do you have preliminary audit information for all of the 922 homes in University Park or only on the 22% enrolled (n=203) or if not, for how many homes do you have audit information? WE HAVE ALL AUDIT INFORMATION FOR THE 200 PARTICIPATING HOMES.

12. What is included in the audit information? If you could provide a data layout, that would be most helpful. Alternatively, please advise as to categories and number of fields. 40 FIELDS, ALL TECHNICAL INFORMATION PERTAINING TO THE HOME AND TO HOME ENERGY CONSUMPTION. AN EASY SUMMARY COULD BE FOUND ON A STANDARD AUDIT REPORT RUN THROUGH BEACON SOFTWARE.

13. Have all 922 residents been asked to participate in the program? How were they contacted? What was the enrollment process? YES ALL WERE CONTACTED. ENROLLMENT REQUIRES ONLY FILLING OUT A FORM, TO BE FOUND ON OUR WEB SITE.

14. What contact information do you have for the 922 residents? NAME, ADDRESS, PHONE NUMBER, E-MAIL

15. The RFP states that the program will be rolled out to an additional 5 tows; what is the population of those towns and are you anticipating a comparable enrollment rate (22%)? THREE TOWNS IDENTIFIED SO FAR RANGING IN SIZE FROM 1,000 – 15,000. WE ANTICIPATE ENROLLMENTS OF 10% OR BETTER.

16. What types of actions are included in what is to be considered a retrofit? GREATER THAN 15% HOME ENERGY SVINGS IS CONSIDERED A RETROFIT. ACTIONS INCLUDE INSULATION, AIR SEALING, HVAC UPGRADES, NEW WINDOWS, DOORS, LIGHTING, APPLIANCES.

17. For the 92 homes that have been retrofitted, how many audits have been conducted with each and at what points in the process (e.g. pre/post, etc.) EVERY HOME MUST HAVE AN AUDIT PRIOR TO A RETROFIT. ALL PARTICIPATING HOMES ALSO HAVE A TEST OUT AUDIT. WE HAVE ALL THE DATA FOR THE PARTICIPATING HOMES,

18. What type(s) of qualitative research have been utilized? In what format is the qualitative research data? What has been collected from whom and at what points in the process? THREE SURVEYS, NUMERICAL SCALES, HAVE BEEN USED FOR EVERY PARTICIPANT AT THE AUDIT AND THE RETROFIT STAGES, AND THE THIRD SURVEY IS ABOUT OVERALL PROGRAM SATISFACTION. EVERYTHING IS CURRENTLY SITTING IN EXCEL IN NUMERICAL FORMAT.

19. Who, if anyone, is your current research/evaluation provider? NOBODY.

20. How is ASE affiliated? THE PROJECT DIRECTOR CHUCK WILSON WORKS FOR ASE. HE IS ON ASSIGNMENT FULL TIME TO MANAGE THE PROJECT (HE IS RESIDENT IN THE TOWN OF UNIVERSITY PARK AND HELPED WRITE THE GRANT PROPOSAL). NO OTHER AFFILIATION.

21. Do you know the status of UP pre- and post-retrofit energy usage data? YES, ONE YEAR OF UTILITY HISTORY PRE-RETROFIT, AND ONE YEAR POST-RETROFIT.

22. The RFP explains that we need to submit a vendor certification and certificate of compliance, yet I don't see those documents nor a description of them in the RFP.Are there vendor certification and certificate of compliance forms that we are expected to complete? The documents to which you refer are the affidavits and the Information regarding the bidder, both included in the circulated and posted bid packages. You do not need to complete any other certifications for the bid.

23. What kind of sampling is desired for the baseline survey? Would STEP-UP prefer that the sample be representative of the population as a whole, or is stratified sampling desired to ensure representation of specific demographic or geographic groups? If stratified sampling is preferred, please specify the criteria for stratification. STRATIFIED SAMPLING IS NOT REQUIRED, BUT RATHER BASELINE QUESTIONS OF THE POPULATION AS A WHOLE. EXAMPLES OF PROSPECTIVE BASELINE QUESTIONS ARE INCLUDED AS PART OF THE RFP, THOUGH THESE EXAMPLES SHOULD NOT BE CONSIDERED EXHAUSTIVE.

24. What kind of screening criteria, if any, would be needed for a household survey? Would the respondent have to be listed on the utility bill, or be listed on the lease, or could any adult in the household respond? THE FIRST ORDER BIFURCATION IS RENTER VS. OWNER. BEYOND THAT, WE WOULD WORK WITH THE SELECTED CONSULTANTS TO DETERMINE EXACTLY WHO WOULD QUALIFY AS A RESPONDENT. CURRENTLY THE RESPONDENTS ARE THOSE WHO SIGN UP FOR THE PROGRAM.

25. Does STEP-UP have interest in an action-based survey, which would create market segmentation in real time and direct target segments to marketing materials regarding the roll-out of STEP-UP in the new community? NO. THIS SOUNDS EXPENSIVE AND BEYOND THE MODEST SCOPE OF THIS PROJECT.

26. For the quantitative data analysis of existing data, would STEP-UP like to see aggregate results or results analyzed according to specific market segments? What would be the market segments of interest? CERTAILY AGGREGATE RESPONSES ARE OUR PRIMARY INTEREST. POSSIBLY SOME SEGMENTED RESPONSES AS WELL, BUT THAT WOULD BE DETERMINED WITH THE CONSULTANT ONCE SELECTED.

27. Is the quantitative data found in one dataset, or are there multiple datasets? Do data for individual respondents need to be linked across multiple datasets or tables, or are all records per respondent contained within single tables or databases? If linking is required, is there a unique identifier that can be used to link multiple tables? THERE ARE MULTIPLE DATA SETS. LINKING ACROSS DATA SETS WILL BE REQUIRED. THERE ARE UNIQUE ID NUMBERS FOR EACH CLIENT.

28. Please describe the qualitative data available for analysis. Are these open-ended survey questions, focus group transcripts, interview transcripts, photographs, etc? How many respondents are represented in the qualitative data? Approximately how much qualitative data is there per respondent (i.e. number of transcript pages, number of open-ended survey questions)? How were respondents sampled to provide qualitative responses? ALL DATA IS NUMERICAL, BASED ON

RANKED QUESTIONNAIRE QUESTIONS DELIVERED AT THREE DISTINCT STAGES OF THE PROGRAM: AUDIT, RETROFIT, AND OVERALL EXPERIENCE WITH THE PROGRAM. STEP-UP WITHOLDS THE FINAL INCENTIVE PAYMENT UNTIL WE HAVE RECEIVED COMPLETED QUESTIONNAIRES FROM PARTICIPANTS. PROBABLY TWO OR THREE PAGES OF RANKED QUESTIONS PER RESPONDENT.

29. Are there any interim dates by which specific deliverables need to be completed in order to support STEP-UP decision-making? WE WILL DETERMINE THAT WITH THE CONSULTANT ONCE SELECTED.

30. What is the available budget for this project? WE ARE LOOKING FOR A COMPETITIVE BID. HOWEVER, IF YOU EMPLOY THE X% OF PROJECT BUDGET FOR EM&V GUIDELINE, OUR OVERALL PROJECT BUDGET IS $1.4 MILLION.

31. Have there been any limitations or problems identified for the current program database? WE DON'T HAVE ONE. EVERYTHING IS IN EXCEL.

32. The key deliverables listed on page 4 support the existing StepUp program in University Park. However, on page 7 you discuss deploying data collection instruments in surrounding communities – to get a baseline for expansion. Please elaborate on the total number of communities and households eligible so that an appropriate costing can be provided. THREE COMMUNITIES HAVE BEEN SELECTED, ALL OF THEM ADJOINING UNIVERSITY PARK: COLLEGE HEIGHTS ESTATES (POPULATION 1,000), RIVERDALE PARK (POPULATION CIRCA 5,000) AND HYATTSVILLE (POPULATION CIRCA 15,000). WE WILL WANT TO DO SOME REPRESENTATIVE BASELINE SAMPLING WITHIN THOSE COMMUNITIES.

33. You mention that you want a comparison of KABB pre- and post- program participation. Did you measure this early in 2011 before marketing the program? How many data points do you have? NO, THIS IS IN REFERENCE TO PRE-AND POST EXPANSION INTO THE NEIGHBORING COMMUNITIES IDENTIFIED ABOVE. WE ANTICIPATE SEVERAL HUNDRED DATA POINTS. BY WAY OF COMPARISON, WITHIN UNIVERISTY PARK WE HAVE 923 HOMES, 2,500 PEOPLE, AND 200 DISTINCT DATA RESPONDENTS / PROGRAM PARTICIPANTS.

34. #6 on page 4 states that you want analysis "on an ongoing basis." I'm assuming that this ends July 2013. Please confirm. YES, CONFIRMED.

35. With input capabilities and interfaces you describe on page 8, developing this database is not trivial. Can you give us a sense of the total project budget and how much of the funds you are willing to allocate to database development? Can you provide more information on the current program database and why you believe that it is not fit for service? Might this be spun off as a separate initiative scoped and priced once we have more knowledge of the current database and Must Haves versus Nice To Haves if a new one is indicated? GOOD QUESTION. IN TERMS OF BUDGET, WE ARE LOOKING FOR THE MOST COMPETITIVE BIDS. IF YOU EMPLOY THE STANDARD EM&V GUIDELINE OF X% OF PROJECT BUDGET FOR EM&V, OUR TOTAL PROJECT BUDGET IS $1.4 MILLION. THE DATABASE IS A MUST HAVE, THOUGH THE GIS PORTION IS NOT A MUST HAVE, AND YES, DEPENDING ON THE BIDS RECEIVED WE MAY CONSIDER SPINNING THIS OFF SEPARATELY. FOR NOW, HOWEVER, WE WANT TO SEE WHAT RESPONDENTS HAVE TO OFFER FOR THE DATABASE AS PART OF THEIR RESPONSE.

36. Is it a requirement that Maryland companies lead this bid? The contract language, below, appears to require that the consultant should be based in Maryland.
    "THIS CONSULTANT'S AGREEMENT (the "Agreement") is effective this _____ day of ___________, 2012, by and between the TOWN OF UNIVERSITY PARK (the "Town"), a municipal corporation of the State of Maryland, whose address is 6724 Baltimore Avenue, University Park, Maryland 20782 and _______________________________, hereinafter referred to as "Consultant," a Maryland corporation, whose address is ________________________________."

    GOOD CATCH. THIS IS JUST LEGACY LANGUAGE FROM OUR STANDARD CONTRACTS, AND DOES NOT APPLY FOR THIS PARTICULAR BID. IF NECESSARY, ADJUSTMENTS WILL BE MADE WITHIN THE CONTRACT OF THE SELECTED CONSULTANT

37. Could you please provide guidance as to how we should provide a fixed price for ad-hoc requests, as outlined in the RFP? IF YOU HAVE AN HOURLY RATE, PLEASE NOTE IT IN YOUR BID PACKAGE. THAT WILL FORM THE BASIS FOR DETERMINING COMPENSATION FOR AD HOC REQUESTS, WHICH WILL BE NEGOTIATED AS PART OF THE CONTRACT AGREEMENT.

38. Is it possible to provide the budget, or budget range, for this project? WE ARE LOOKING FOR A COMPETITIVE BID. HOWEVER, IF YOU APPLY THE STANDARD EM&V FORMULA OF X% OF PROJECT BUDGET FOR EM&V, OUR TOTAL PROJECT BUDGET IS $1.4 MILLION.

39. Is it a preference that the successful bidder be comprised of a team, or that only one firm be contracted and engaged in this project? WE ARE OPEN TO EITHER, SO LONG AS THERE IS A CLEAR SINGLE POINT OF CONTACT.