

**RESPONSES TO QUESTIONS**

**RFP EM-021-2024: IMPACT EVALUATION OF HEAT PUMP WATER HEATER AND ELECTRONICALLY COMMUTATED MOTOR MEASURES**

*Last Revised 6/5/2024*

**Q1: For both the heat pump water heater and ECM pump measures, please provide the data fields that the effRT captures for each product and for each delivery channel (i.e., Retail Initiative and Distributor Initiative). As part of this request, please confirm whether customer information is collected, including customer name, address, account number(s), and contact information.**

**A1:** The following table defines the common data points available for all projects and measures. The program columns indicate whether that data is populated for the specific program.

<b>Program Name</b>	<b>Distributor HVAC - Electric</b>	<b>Distributor Domestic Hot Water – Electric</b>	<b>Distributor – RGGI</b>	<b>Appliance Instant</b>	<b>Appliance Rebate</b>	<b>Retail – RGGI</b>
Enrollment Number	Unique ID automatically assigned by effRT for each rebate claim. An enrollment may contain one or more measures.					
Reference Number	Unique key to external database entries			N/A		
Enrollment Date	Date listed in upload file.			Post mark of claim form submission		
Paid Date	Date recorded in effRT for when the rebate was paid. Also referred to as Check Date.					
Customer Name	Collected for some. Names and addresses are available for 2400 rebates issued August 2022 - May 2024	Not collected for bulk purchases. Collected for all others.			Always collected	
App Last Name						
App First Name						
Install Street/PO						
Install City						
Install State						
Install Zip Code						
Mailing Street/PO						
Mailing City						
Mailing State						
Mailing Zip Code						

Primary Phone	Not collected	Optional. Available for most records.	
Customer Email			
Trade Ally 1	Distributor		Retailer or not collected
Measure Name	Recorded for all measures		
Measure Code			
Measure Incentive			
Installed Measure Qty			
kWh			
W kW			
S kW			
Therms	<p>Calculated site impacts per Technical Reference Manual recorded as Gross.            Positive values indicate savings (decreases in consumption). Negative values indicate increased consumption. W kW and S kW are demand impacts coincident with ISO NE defined winter and summer peaks. Therms are natural gas impacts in Therms/y. Propane, Heating Oil, Kerosene and Wood are reported in MMBtu/y. Water is reported in gallons/y.</p>		
Propane			
Heating Oil			
Kerosene			
Wood			
Water			

The tables below provide the custom measure properties defined for each measure and whether the property is required or optional.

<u>Measure Code</u>	<u>Measure Name</u>	<u>Property Name</u>	<u>Property Required</u>	<u>Property Control Type</u>	<u>Property Values</u> for DDL (Name Value list separated by ; )	<u>Notes</u>
ECMHW	ECMHW Electronically Commuted Pump	Distributor	Yes	Text Box		
		Distributor Invoice #	Yes	Text Box		
		Date Submitted	Yes	Date		
		PPA#	Yes	Text Box		Agreement with distributor
		Customer Invoice ID	Yes	Text Box		Distributor data
		Purchase Date	Yes	Date		
		Install Vendor	Yes	Text Box		

		Install Vendor Phone	Yes	Text Box		
		Install Vendor City	Yes	Text Box		
		Customer Type	Yes	Drop Down List	C 1; R 2; U 3; I 4	
		Reason	Yes	Drop Down List	New construction or addition 0; Planned replacement/upgrade/renovation 1; Replacement of failed equipment 2; Proactive replacement of equipment 3; Early/Unplanned replacement of operating equipment 4; Unknown 5	
		Manufacturer	Yes	Text Box		
		Model #	Yes	Text Box		
		Retail Price	Yes	Numeric Value		
		Stipend/Paperwork Fee	Yes	Numeric Value		
		Make	Optional	Drop Down List	Defined by lookup file	
		Model	Optional	Drop Down List	Defined by lookup file	
		Rated Watts	Optional	File Lookup		
		Incentive Level	Yes	Drop Down List	Purchase Date ON or BEFORE 3/31/23 75; Purchase Date ON or AFTER 4/1/23 100; Purchase Date ON or AFTER 7/1/23 75; Purchase Date ON or AFTER 10/1/23 100; Purchase Date ON or AFTER 1/1/24 75	Used to calculate correct incentive level in effRT

<u>Measure Code</u>	<u>Measure Name</u>	<u>Property Name</u>	<u>Property Required</u>	<u>Property Control Type</u>	<u>Property Values</u> for DDL (Name Value list separated by ; )	<u>Notes</u>
HPWHM	Heat Pump Water Heater - Mail-In	Manufacturer	Yes	Drop Down List	Defined by lookup file	
		Model #	Yes	Drop Down List	Defined by lookup file	
		Rebate Level	Yes	Drop Down List	Purchased On or BEFORE 6/30/2021 750; Purchased On or AFTER 7/1/2021 850; Lowe's purchased On or AFTER 12/1/2022 950; Purchased On or AFTER 1/1/2024 850	Used to calculate correct incentive level in effRT
		Customer Type	Yes	Drop Down List	C 1; R 2; U 3	
		Store	Yes	Drop Down List	Agren Appliance-Auburn 0; Agren Appliance-Bridgton 1; Agren Appliance-Norway 2; Agren Appliance-Online 3; Agren Appliance-Saco 4; Agren Appliance-South Portland 5; Agren Appliance-Topsham 6...	
		Installer	Optional	Text Box		
		Retail Price	Optional	Numeric Value		
		Purchase Date	Optional	Date		
		Date Postmarked	Optional	Date		
		Date Purchased	Optional	Date		Holdover from previous configuration

<u>Measure Code</u>	<u>Measure Name</u>	<u>Property Name</u>	<u>Property Required</u>	<u>Property Control Type</u>	<u>Property Values</u> for DDL (Name Value list separated by ; )	<u>Notes</u>
HPWHI	Heat Pump Water Heater Instant Discount	Customer Type	Yes	Drop Down List	C 1; R 2; U 3	
		Store	Yes	Text Box		
		Retail Price	Optional	Numeric Value		
		Mail In Rebate (y/n)	Yes	Drop Down List	y 1; n 0	Always set to "n"
		Rebate Amount	Yes	Numeric Value		
		Bonus Amount	Yes	Numeric Value		
		Manufacturer and Model #	Optional	Text Box		

<u>Measure Code</u>	<u>Measure Name</u>	<u>Property Name</u>	<u>Property Required</u>	<u>Property Control Type</u>	<u>Property Values</u> for DDL (Name Value list separated by ; )	<u>Notes</u>
HPWHD	Heat Pump Water Heater	Rebate Level	Yes	Drop Down List	Purchased On or BEFORE 6/30/2021   750; Purchased On or AFTER 7/1/2021   850; Submitted On or AFTER 5/1/2022   851; Purchased On or AFTER 7/1/2023   851; Purchased On or AFTER 3/1/2024   1050	Used to calculate correct incentive level in effRT
		Distributor	Yes	Text Box		
		Distributor Invoice #	Yes	Text Box		
		Date Submitted	Yes	Date		
		PPA#	Yes	Text Box		Agreement with distributor
		Customer Invoice ID	Yes	Text Box		Distributor data
		Purchase Date	Yes	Date		
		Install Vendor	Yes	Text Box		
		Install Vendor Phone	Yes	Text Box		
		Install Vendor City	Yes	Text Box		
		Customer Type	Yes	Drop Down List	C 1; R 2; U 3	
		Manufacturer	Yes	Text Box		
		Model #	Yes	Text Box		
		Final Price Paid	Yes	Numeric Value		
		Bonus Amount	Optional	Formula	Calculated based on reported final price paid	
		Stipend/Paperwork Fee	Yes	Numeric Value		
		Make	Optional	Drop Down List	Defined by lookup file	
		Model	Optional	Drop Down List	Defined by lookup file	



		Energy Factor	Optional	File Lookup	Populated based on Make/Model selection	
		Volume - Gallons	Optional	File Lookup	Populated based on Make/Model selection	

<u>Measure Code</u>	<u>Measure Name</u>	<u>Property Name</u>	<u>Property Required</u>	<u>Property Control Type</u>	<u>Property Values</u> for DDL (Name Value list separated by ; )	<u>Notes</u>	
HPWHB	Heat Pump Water Heater Bulk				Purchased On or BEFORE 6/30/2021 750; Purchased On or AFTER 7/1/2021 850; Submitted On or AFTER 5/1/2022 851; Purchased On or AFTER 7/1/2023 851; Purchased On or AFTER 3/1/2024 1150	Used to calculate correct incentive level in effRT	
		Rebate Level	Yes	Drop Down List			
		Distributor	Yes	Text Box			
		Distributor Invoice #	Yes	Text Box			
		Date Submitted	Yes	Date			
		PPA#	Yes	Text Box			
		Customer Invoice ID	Yes	Text Box			
		Purchase Date	Yes	Date			
		Install Vendor	Yes	Text Box			
		Install Vendor Phone	Yes	Text Box			
		Install Vendor City	Yes	Text Box			
		Customer Type	Yes	Drop Down List	C 1; R 2; U 3		
		Manufacturer	Yes	Text Box			Allows free text entry by distributor
		Model #	Yes	Text Box			
Final Price Paid	Yes	Numeric Value					
Bonus Amount	Optional	Formula					

		Stipend/Paperwork Fee	Yes	Numeric Value		
		Make	Optional	Drop Down List	Defined by lookup file	Make/Model selected from predefined list by processor
		Model	Optional	Drop Down List	Defined by lookup file	
		Energy Factor	Optional	File Lookup	Populated based on Make/Model selection	
		Volume - Gallons	Optional	File Lookup	Populated based on Make/Model selection	

**Q2: Are bids considered confidential?**

A2: No. Bidders should be aware that information provided to the Trust is subject to the Maine Freedom of Access Act (FOAA), 1 M.R.S. §§ 401 et seq., unless there is a specific confidentiality exemption in the Efficiency Maine Trust Act, 35-A M.R.S. §10106. Bidders should assume that all information submitted in response to this RFP will be considered public records available for public inspection pursuant to the Maine FOAA following announcement of an award decision.