

**Summary Notes from EMFACT Bidder's Conference
Tuesday, November 7, 2006
Massachusetts Executive Office of Environmental Affairs**

Scope and Functionality of the Software

Question: The scope of the RFP appears to be very broad. For clarification purposes, are NEWMOA and MA OTA seeking a tool that is 100 percent accountable, with a complete mass balance for materials and energy that would also require information on control technology and efficiencies? (To do a complete mass balance would require information on the efficiency of control technologies, such as scrubbers and thermal oxidizers.)

Answer: NEWMOA/MA OTA recognize that the RFP is far-reaching and that to fulfill all of the specifications in the request is not feasible with the amount of money available. Therefore, when NEWMOA/MA OTA use language in the RFP such as "prefers" or "would like," this is a signal to potential vendors that these elements are desired but not required and that a vendor could propose to build these into the tool for Phase 2. NEWMOA and OTA will look for preferred elements not addressed in Phase 1 in proposals for Phase 2.

When NEWMOA/MA OTA use language such as "the tool needs to," this specifies core minimum requirements that must be built into the tool in Phase 1. Materials' tracking across all media is a core requirement for Phase 1, but energy is not. Costs are also a preferred element, desired but not required for Phase 1.

NEWMOA/MA OTA are not requiring control technologies and their efficiencies to be a part of the Phase 1 Tool, but contractors can put a place holder in the tool for users to input this information if they desire.

Question: Must the program be able to handle information on chemical use and emissions across all media (air, water, and waste)?

Answer: Yes, NEWMOA and MA OTA are interested in tracking materials flow across all media; however, container waste tracking is not a required element.

Question: Should mass balance calculations be a part of the tool or can the tool simply provide a place holder to input numbers from mass balance calculations done off line?

Answer: Including a function for calculating mass balance is preferred but not required for Phase 1.

Question: Should the tool be able to calculate the pounds of material removed by a control device?

Answer: It is not required, but a contractor could opt to include a place holder for this so that a user could put in the removal efficiency of a control device and make this calculation if they desired.

Question: Are fuel throughput and fuel costs considered Phase 2 elements?

Answer: No, fuel throughput ability should be in Phase 1. Contractors should give users the option of treating energy as a material (e.g., natural gas or heating oil) so that they can track amount of oil or gas consumed. Fuel cost tracking should also be a Phase 1 element. Even though fuel prices change, a place holder can be added to the tool that would allow users to input the price.

Question: On page 11 in the RFP it specifies that the tool be able to interface to purchasing systems. What is the proposed mechanism for this, manual entry or exporting of data?

Answer: During the scoping phase of the project, potential users told NEWMOA/MA OTA that they would like an automated connection to purchasing systems. Users want some interface on the front end so that purchasing data can be imported; they strongly prefer not to have to do manual entry of purchasing data.

An objective of this phase of the tool development is that it be successful. Manual data entry would not be considered successful. Potential users are looking for a place where purchasing data can be grabbed or dumped.

NEWMOA/MA OTA do not envision a direct link to purchasing systems; they would like the vendor to define a format for the importing or exporting of purchasing data, recognizing that companies use many different computer software systems for tracking their purchasing.

Question: Can vendors assume that the floor for purchasing data would be equivalent to ASCII tab delimited, Excel or Access?

Answer: Yes.

Question: Are the process flow diagrams a minimum requirement?

Answer: No, they are a preferred element. By process flow diagram NEWMOA/MA OTA do not mean the strict engineering meaning of this term. What they are looking for is some sort of visual mapping to see the flow of materials.

Question: The RFP requests the ability to trend and normalize reports. What are you looking for, a place to plug in a normalization factor?

Answer: Yes.

Question: Of the preferred items, did any bubble to the top?

Answer: No. NEWMOA/MA OTA will look at each vendor's talents and what additional value they are proposing to add, but the core minimum requirements are the most important.

Question: Can we include reporting requirements other than those for Massachusetts and is the target small and mid-sized companies?

Answer: Yes, you can put in additional reporting requirements and small and mid-sized companies are the target users.

Question: What do you mean by including prompts? Is this a calendar function or an email prompt?

Answer: Prompts alert the user that s/he needs to act on something. The program would require some sort of calendar function to generate the prompts. NEWMOA and MA OTA do not envision having an email sent for the prompt. It could be that the user receives the prompt only when s/he opens the program or that an auto-launch is added to the program.

Question: Did members of the Advisory Board offer reasons for why they would not use the tool?

Answer: Manual input of data was cited as a key barrier. Also they do not want a tool that would require a lot of reading to understand it.

Some companies that have systems for tracking chemicals and materials also mentioned that they do not get to conduct creative analysis of their data, so making this easy for them would be desirable.

Proposal Logistics/Award Application Process

Question: Page 2 specifies that the proposal should be no longer than 15 pages. Does this include the resumes as well?

Answer: No, the 15-page limit refers to the workplan, timeline and budget only. Additional pages can be included for the qualifications and resumes.

Question: Would you like hard copies of the proposal or can we email a pdf file?

Answer: You must submit 5 hard copy copies. An emailed pdf file would be very useful but is not required

Question: Is October 31, 2007 a drop dead date for completing the project?

Answer: NEWMOA and MA OTA are aiming to have the project completed within one year of awarding the contract; however they will allow flexibility for delays that are their fault. The contract will contain standard language addressing such delays.

Question: When will the contractor receive the award? And how long will it take to finalize a contract?

Answer: The award will be granted most likely in early January. The contract will be negotiated through NEWMOA, which has a more streamlined process than the state. NEWMOA/MA OTA will amend the deadlines in the contract so that the contractor will have one full year to complete the project.

Question: Has there been an attempt to cost out each of the desired elements? Have NEWMOA/MA OTA put a dollar value on each of the required and preferred elements?

Answer: No, but NEWMOA and MA OTA know that what they have defined as the minimum core requirements are what they need to have a good tool.

NEWMOA and MA OTA are looking to see how much they can get for the money that's available and will select the contractor that provides the best value. They want the core of what they are seeking done well.

Software Bugs

Question: Can money be held back to fix any bugs that may arise after the software is developed?

Answer: NEWMOA/MA OTA are not requiring that money be set aside to fix bugs, but it is acceptable to do this. Note that major problems, such as a function not working as intended, must be fixed within the limits of the contract and that the contractor will be held responsible for fixing major bugs for up to one year after the tool is released.

Question: How is a "bug" defined?

Answer: NEWMOA and MA OTA have not yet formally defined a "bug" but are leaning towards defining it as one in which a particular function does not work as intended. What constitutes a bug will be more specifically defined in the contract. Whatever the contractor and NEWMOA/MA OTA negotiate for the contract will be used as the basis for determining whether a bug is a flaw that requires fixing

Bugs will not include problems associated with the settings on a particular desk top system (i.e., if a user has special software to screen out pop ups).

NEWMOA and MA OTA are also open to contractors' proposed definitions of what constitutes a bug.

Software Logistics

Question: Should the tool include an automatic registration?

Answer: At this time automatic registration is not mandatory. There will be some registration process for the software that NEWMOA/MA OTA will handle.

Question: Will the vendor have rights to the list of registered users?

Answer: This has not yet been decided.

Question: Who will maintain the software?

Answer: NEWMOA and OTA, after the first year.

Question: Should the downloadable software be in a configuration for 5 users, or should it be self-contained for one user? Or should the contractor develop two versions, a single use version and a networked version?

Answer: The RFP calls for a tool that is easily downloadable on a single desktop or to a network system of up to 5 computers.

Question: Can network capability be a Phase 2 element?

Answer: Yes, network capability is a "preferred or ideal" functionality.

Question: Must the software be self-contained or can other platforms, such as Access, be required to run it?

Answer: It is acceptable to use Access as a software platform for running the tool. When NEWMOA/MA OTA surveyed potential users, they found that users typically have Access and Excel. It is also acceptable to propose a different platform.

Question: The RFP says that the platform should be Windows 2000 or higher, but a contractor could be in the final stage of development when a new Windows platform is released. What is the cut-off date for using the current platform?

Answer: Contractors should address how they would handle the release of a new Windows platform in their proposal. NEWMOA and MA OTA have not come up with a cut-off date.

Question: How do you define a beginner's or basic interface? Could the amount of help offered be one way to accomplish this? Is offering fewer choices another way to accomplish this (i.e., pick 3 materials for the analysis)?

Answer: Contractors can build a basic interface however they want. It could be that the contractor designs a simple package with few choices or a more complex package with lots of embedded help. Contractors should keep in mind that it's important to build in flexibility so that the user can structure how they want to use the tool.

Pilot Testing the Software and Training Requirement:

Question: Will the pilot workshops be held primarily in Massachusetts?

Answer: Yes

Question: Will NEWMOA/MA OTA be open to liberal use of teleconferencing during the software development to keep travel costs to a minimum?

Answer: Yes, NEWMOA/MA OTA can accomplish a lot through phone calls and web conferencing.

Question: Can the training workshops also be used to pilot test the software? Can the contractor collect data during the workshops to help pilot test the tool or will data need to be collected on top of the training requirement?

Answer: NEWMOA and MA OTA have not yet discussed the training workshops; however, MA OTA will furnish much of the data required to pilot test the software. The role of the vendor in the pilot training is to make sure the presentation of the software is clear. NEWMOA and MA OTA will handle the application of the software and expect to work closely with the contractor on the training.

Note that the project melds the Beta testing with the subsequent training requirement, and NEWMOA/MA OTA are responsible for the Beta testing.

The Advisory Board to the project will also be involved in testing the tool. NEWMOA/MA OTA hope to get input from some of the small and mid-sized companies on the Advisory Board.

Question: Will the Advisory Board be part of the Beta testing?

Answer: Yes, NEWMOA and MA OTA will recruit some of the members.

Question: Will the vendor have access to the Advisory Board? Will the Advisory Board be involved in the design phase?

Answer: NEWMOA and MA OTA may consult with a relatively small subset of members of the Advisory Board during the design phase. The entire Advisory Board will not be involved until the Beta testing. However, NEWMOA/MA OTA could provide access to Advisory Board members if that would be helpful.

Funding for Phase 2

Question: Have NEWMOA/MA OTA identified funding sources for future spirals? Are there any mechanisms in place to fund Phase 2?

Answer: A good product is the best guarantee of future funding. At this time NEWMOA/MA OTA do not have funding in place for Phase 2.

Help Text and User Manual

Question: What sort of help text are you looking for? Something simple and focused on the technical aspects of operating the tool, or something more involved that might for example provide explanations of key terms, like normalization?

Answer: The simple approach, providing information on how to use the software, is a core minimum; however, contractors can propose to add more.

Question: Would you like the help text to be a pop-up on a field or a link to a help page?

Answer: It's left to the contractor's discretion.

Question: What kind of user manual are NEWMOA/MA OTA looking for, a comprehensive manual or one with a minimalist approach?

Answer: It's up to the contractor, but keep in mind the user manual is an important part of the software.

Source Code and Intellectual Property Rights

Question: Will the vendor's name be associated with the software? Can a splash screen be included when the software opens or closes?

Answer: The software will credit the vendor; however, anything beyond that is uncertain. MA OTA needs to look into whether the state allows that.

Question: Must the contractor submit the source code?

Answer: Yes, it's in the RFP. It could be handled as a 3-year license and the source code must be submitted to NEWMOA and MA OTA when the contract is fulfilled. Note that if NEWMOA or MA OTA modify the source code, the contractor will not be held liable for any problems that could arise.

Question: Will the source code be made public?

Answer: NEWMOA/MA OTA will determine this at a later date.

Question: Will the code be peer reviewed as EPA does with other software projects?

Answer: No, NEWMOA/MA OTA do not see this tool as a compliance tool. NEWMOA/MA OTA can put caveats on the tool that it is not responsible for helping users meet compliance deadlines, and users need to recognize that the output will be based on what they put into the tool.