FOURTH AMENDATORY AGREEMENT

This **FOURTH AMENDATORY AGREEMENT** ("Agreement") is made between the **CITY AND COUNTY OF DENVER**, a municipal corporation of the State of Colorado (the "City") and **TOUCHSTONE IQ LLC**, a Colorado limited liability company, (f/k/a Overlay, LLC), whose address is 2000 S. Colorado Blvd, Annex Suite 460, Denver, CO 80222 (the "Consultant"), jointly "the Parties".

RECITALS:

A. The Parties entered into an Agreement dated January 3, 2022, an Amendatory Agreement dated November 30, 2022, a Second Amendatory Agreement dated January 24, 2023, and a Third Amendatory Agreement dated July 5, 2023 (collectively the "Agreement") to perform, and complete all of the services and produce all the deliverables set forth on Exhibit A, the Scope of Work, to the City's satisfaction.

B. The Parties now wish to amend the Agreement to amend the Scope of Work and Budget increase the Maximum Contract Amount and to make such other amendments as are herein set forth.

NOW THEREFORE, in consideration of the mutual covenants and agreements hereinafter set forth and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the Parties incorporate the recitals set forth above and amend the Agreement as follows:

1. Exhibit A, Exhibit A-1, and Exhibit A-2 are hereby deleted in their entirety and replaced with Exhibit A-3. All references in the original Agreement to Exhibit A, Exhibit A-1, and Exhibit A-2 now refer to Exhibit A-3. The Scope of Work marked as **Exhibit A-3** attached to this Amendatory Agreement is hereby incorporated by reference.

2. Exhibit B, Exhibit B-1, and Exhibit B-2 are hereby deleted in their entirety and replaced with Exhibit B-3. All references in the original Agreement to Exhibit B, Exhibit B-1, and Exhibit B-2 now refer to Exhibit B-3. The Budget marked as **Exhibit B-3** attached to this Amendatory Agreement is hereby incorporated by reference.

3. Section 4 of the Agreement, entitled "**COMPENSATION AND PAYMENT**", Subsection d. (1) entitled "**Maximum Contract Amount**", is deleted in its entirety and replaced with the following:

"**d**. **Maximum Contract Amount:**

(1) Notwithstanding any other provision of the Agreement, the City's maximum payment obligation will not exceed **SEVENTEEN MILLION SEVEN HUNDRED THIRTY THOUSAND SIX HUNDRED NINETY-NINE DOLLARS AND ZERO CENTS ($17,730,699.00)** (the "Maximum Contract Amount"). The City is not obligated to execute an Agreement or any amendments for any further services, including any services performed by the Consultant beyond that specifically described in **Exhibit A-3**. Any services performed beyond those in **Exhibit A-3** or performed outside the Term are performed at the Consultant's risk and without authorization under the Agreement."

4. A new section 36, entitled "**<u>COMPLIANCE WITH DENVER WAGE LAWS</u>**", is hereby added to the Agreement to read as follows:

"**36**. **<u>COMPLIANCE WITH DENVER WAGE LAWS</u>**: To the extent applicable to the Consultant's provision of Services hereunder, the Consultant shall comply with, and agrees to be bound by, all rules, regulations, requirements, conditions, and City determinations regarding the City's Minimum Wage and Civil Wage Theft Ordinances, Sections 58-1 through 58-26 D.R.M.C., including, but not limited to, the requirement that every covered worker shall be paid all earned wages under applicable state, federal, and city law in accordance with the foregoing D.R.M.C. Sections. By executing this Agreement, the Consultant expressly acknowledges that the Consultant is aware of the requirements of the City's Minimum Wage and Civil Wage Theft Ordinances and that any failure by the Consultant, or any other individual or entity acting subject to this Agreement, to strictly comply with the foregoing D.R.M.C. Sections shall result in the penalties and other remedies authorized therein."

5. As herein amended, the Agreement is affirmed, and ratified in each and every particular.

6. This Fourth Amendatory Agreement will not be effective or binding on the City until it has been fully executed by all required signatories of the City and County of Denver, and if required by Charter, approved by the City Council.

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[SIGNATURE PAGES FOLLOW.]

Contract Control Number: CASR-202475978-04_202160618-04
Contractor Name: Touchstone IQ LLC fka OVERLAY LLC

IN WITNESS WHEREOF, the parties have set their hands and affixed their seals at Denver, Colorado as of:

SEAL

CITY AND COUNTY OF DENVER:

ATTEST:

By: ________________________________

____

APPROVED AS TO FORM:

Attorney for the City and County of Denver

By: ________________________________

REGISTERED AND COUNTERSIGNED:

By: ________________________________

By: ________________________________

Contract Control Number: CASR-202475978-04_202160618-04
Contractor Name: Touchstone IQ LLC fka OVERLAY LLC

DocuSigned by:

By: Jonathan Dierking

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Name: Jonathan Dierking
(please print)

Title: CEO
(please print)

ATTEST: [if required]

By: ______________________________

Name: ______________________________
(please print)

Title: ______________________________
(please print)

Scope of Work – Exhibit A-3

TASK 1: ENERGIZE DENVER RESOURCE HUB

Sub Task 1: Energize Denver Resource Hub – Help Center Management: Benchmarking and Building Performance Requirements

The Help Center represents the City in all communications around the benchmarking and building performance requirements ordinance and is the main point of contact for Building Owners and property managers required to benchmark their buildings. The purpose of the Help Center is to be a one-stop-shop for Building Owners to be able to successfully benchmark their buildings and allow the City to achieve 90% or higher compliance each year. The Help Center's role is also to provide general support to Building Owners that are covered by the performance requirements. It is likely that Touchstone IQ will partner with several subcontractors to complete various scopes within this Sub Task.

Administration

The Help Center team will continue to execute all help center functions utilizing the Touchstone IQ for Governments™ (Touchstone) cloud-based Software-as-a-Service (SaaS) solution. The Help Center will be staffed with trained sustainability / benchmarking consultants from 9:00am – 5:00pm, Monday through Friday.

The Help Center will be regularly staffed by two sustainability consultants. Additional representatives will be added during peak periods, as needed.

All phone calls and emails received through the Help Center will be answered directly or responded to within 24-48 hours. Communications received at the end of the day on Friday or over the weekend will be responded to on Monday, at the latest.

The Help Center staff will utilize screen sharing technology to easily identify submission issues and correct building owner problems in real-time. The team will continue to utilize an online scheduling system to setup one-on-one meeting with building owners. Staff will also coordinate with local Utilities to facilitate auto utility data uploads, where possible. Help Center staff will serve as a liaison between Building Owners and Xcel Energy's benchmarking team and will be responsible for maintaining a healthy relationship with Xcel's benchmarking team.

All building owner communications will be tracked through the Touchstone platform for both emails and phone calls.

Help Center staff will continue to help set up the benchmarking program in the months leading up to the open date in March and help with closing the program in late summer. This includes prepping/updating resource materials, testing systems, uploading new assessor information, reaching out to service providers, and manually looking up condo information etc.

Submission Management

Help Center staff will receive, track, and manage all building owner compliance submissions. Submission approval, denial, and requests for additional information will be tracked by Help Center staff within Touchstone. Help Center staff will respond within 24-48 hours to all building owner exemption requests.

Submissions that do not pass the software quality control checks will automatically receive email notifications with information on the building's submissions issue and directions on how to resolve. A ticket is also automatically generated and assigned to a designated Help Center staff member. Help Center staff will follow up with building owners whose submissions remain in the "Pending Resubmittal" status for over 2-weeks (2 – week response time can be adjusted by the City).

Compliance statuses will be provided publicly through both the Energize Denver Benchmarking Map as well as the Energize Denver Performance Requirements Look Up Tool.

Building Owner Portal

To simplify the building owner experience in benchmarking and performance compliance submission, starting in the first quarter of 2025, Touchstone will introduce the Building Owner Portal (Portal) for buildings 25,000 sq. ft. and larger. The portal is a public facing tool utilized by building owners to for submission collection as well as contain benchmarking and BPS resources and education. The Portal will include but is not limited to the following functionality and resources:

- ENERGY STAR® Portfolio Manager® benchmarking submission collection through Web Services.
- Additional data collection and submission forms.
- Tool access: Energize Denver Map, Energize Denver Building Performance Forecasting Calculator, Energize Denver Performance Requirements Look Up Tool, Trade Ally Network, Touchstone IQ for Buildings, Help Center support ticketing system, etc.
- Benchmarking and BPS resource library: training videos, how-to guides, playbooks, case studies, technical 1-pagers, etc. (Hub content).
- Real time benchmarking, BPS, and form status updates.
- BPS checklist and guidance based on current status.

As part of the transition to the Building Owner Portal, building owners will receive additional training, on-boarding support, and new resources to ensure building owners are supported in utilizing this new tool and data collection process.

Data Management

Help Center employees are responsible for maintaining the accuracy of the data within Touchstone. Help Center staff will continually update the data tracking system to reflect new building and/or owner data. As needed, Help Center staff will work with the City to assign new Denver Building IDs (DBID) for compliance tracking purposes. Twice a year,

Help Center staff will compile data from the assessor department to identify newly constructed buildings and updated building owner contact information. Only new buildings and buildings with changes in ownership will be updated.
The assessor data will also have new buildings, new profiles with assigned DBIDs will need to be created for all new buildings. The Help Center will complete additional steps to identify new owners of condominiums by looking up individual condominiums on the Secretary of State website to manually retrieve ownership information.

The City has an initial covered buildings list that identifies all buildings that are required to comply with the benchmarking ordinance. Help Center staff will continue to update and refine this list and identify building owners associated with each building. Some parcels have multiple buildings on them and depending on how the buildings are metered and if they are connected or not, those multiple buildings will need to be added to the covered buildings list, associated with that parcel for compliance tracking purposes, and assigned their own DBID. The Help Center will help expand and improve upon the covered buildings list while helping owners understand if and when they need to comply.

Performance Requirements

Help Center staff will also be available via phone and email to provide general support for all buildings covered by the building performance policy. Staff may provide the following services:

- Sending compliance notifications to building owners informing them of the new policy, targets, deadlines etc.
- Assisting Building Owners in understanding their targets, deadlines, and options under the policy.
- Evaluating compliance statuses of buildings in relation to the Building Performance Policy.
- Assisting in developing an alternate compliance path for building owners.
- Reviewing alternate compliance path requests.
- Managing and maintaining a buildings database.

Touchstone IQ will work in collaboration with the City to review building performance policy form submissions (i.e., Target Adjustments, Timeline Adjustments, ACOs, etc.). In any scenario where a Performance Requirement target or timeline is being adjusted, Touchstone IQ will provide a recommendation, but the City will be responsible for the final decision.

Compliance Outreach

Help Center staff will perform outreach activities to help educate building owners on compliance requirements. This will include email blasts and direct phone calls. Touchstone IQ will support direct mailings through the development of content and building address lists. Help Center staff will be responsible for pulling mailing lists for the City to be used by a mailer to send paper notices to buildings and checking and ensuring the accuracy of each list that is pulled. Help Center staff are responsible for making necessary edits to email compliance notices, sending drafts for review to the

City, sending test emails for review to the City, and sending out approved notices. It is expected that the City will cover all costs associated with direct mail printing and postage. Direct outreach activities will include the following tasks, at a minimum.

- Send monthly email compliance reminders (benchmarking & BPS) at the start of the benchmarking season and move to bi-weekly email compliance reminders starting in May until the dataset closes.
- Send two formal compliance reminder notices each year.
  - Mail (mailer production and distribution costs to be covered by the City).
- Send one formal violation reminder notice each year for non-compliant building owners.
  - Email and mail (mailer production and distribution costs to be covered by the City).
- If deemed necessary, after the compliance deadline Help Center staff will call non-compliant building owners.
  - If deemed necessary, a 2nd round of non-compliance calls will be made to building owners who have yet to submit 2 months after the submittal deadline.

Touchstone IQ will target achieving a minimum benchmarking compliance rate of 90%.

Touchstone IQ for Buildings

Starting in Q3/Q4 of 2024, the City will provide to all interested buildings 25,000 sq. ft. and larger an annual software license for Touchstone IQ for Buildings. Touchstone IQ for Buildings is an end-to-end SaaS energy management solution designed to simplify benchmarking, track energy usage, identify potential energy and costs saving opportunities, and set up progress against goals and projects.

Virtual Energy Assessment

The Touchstone IQ for Buildings software includes an ASHRAE Level I Virtual Energy Assessment. The Virtual Energy Assessment Questionnaire is a set of up to 43 questions about the equipment and operation of the building. Edits and additional questions may be added to the Virtual Energy Assessment as desired by the City.

The questions in the Virtual Energy Assessment are intended to be high-level, but it is recommended that the user be somewhat familiar with their building's information. Once the Questionnaire is completed, the software will provide the user with a set of recommendations to improve the energy performance of their building based on the responses given. Each recommendation includes a description for the improvement, a range of estimated energy and cost savings, a range of estimated implementation costs, and a range of estimated financial simple payback timeframes. If it is determined by the user that a recommendation is feasible, additional information could be requested in revise the estimated energy savings, cost savings, and implementation costs to more accurate values. The user can then use the recommendations to create projects and set goals, tracking updates as they progress with implementation.

Additional training, on-boarding support, and resource development will come with the Touchstone IQ for Buildings offering to ensure building owners are supported in utilizing this new tool.

Building Scorecards

After the close of the annual benchmarking reporting data request, Help Center staff will manage the design and distribution of the annual building owner scorecard. This will include working with City staff on defining the scorecard metrics, (including the agreed-upon BPP metrics incorporated in 2022), building owner action items, and recommendations.

Staff will utilize the Touchstone built-in scorecard development tool to update and customize the scorecard design. Scorecards will be distributed directly from Touchstone through personalized emails as PDF attachments.

Manufacturing, Agricultural and Industrial (MAI) Building Tracking

Touchstone IQ will work with the City to develop a tracking module including online forms for collecting MAI Building data. Online forms will be integrated directly with Touchstone through a separate MAI module for tracking, display and approval management of submitted data. Help Center staff will work in collaboration with the City to review MAI building performance policy form submissions (i.e., ACO applications, implementation reports, EPI Score, etc.). In any scenario where a Performance Requirement target or timeline is being adjusted, Touchstone IQ will provide a recommendation, but the City will be responsible for the final decision.
The Touchstone IQ development team will work with the City to scope out the functionality including draft presentation designs and workflows prior to launch. Access to Touchstone including the MAI module will be provided to the City's MAI buildings team. MAI-specific modifications to building scorecards and public facing tools will also be completed if requested by the MAI team.

Sub Task 2: Energize Denver Resource Hub – Material/Content Development and Trade Ally Network for Benchmarking and Building Performance Policy

The Touchstone IQ Team will continue to develop materials and content for the Hub focused on both benchmarking and building performance requirements. The information will provide both generalized and customized BPP support to Denver community stakeholders. Benchmarking services provided with the current benchmarking Help Center will continue and expand to include BPP support.

Training and Resources - Benchmarking

Touchstone IQ will provide presentation-style and interactive web-based and/or in-person trainings and help sessions. Staff will deliver one training per month for the three months prior to benchmarking submission deadlines, if deemed necessary by the City. Touchstone staff will coordinate, when possible, with representatives from Energy Star Portfolio Manager (ESPM).

Touchstone IQ will also continue to maintain and update resources for the benchmarking program including the on-demand video training series customized for the City's reporting program, how-to videos, updated FAQs, and checklists, etc. Help Center staff will also maintain the Benchmarking Help Center Manual and associated communications templates. This includes updating the Manual to be in line with Touchstone operations.

Help Center staff will also review the Resource Hub and suggest edits and improvements throughout the season. The Help Center is responsible for maintaining the list of trained service providers.

Training and Resources – Building Performance Policy

Touchstone IQ will provide an online building performance requirements calculator that enables Building Owners to evaluate various compliance strategies and scenarios. The calculator will show Building Owners their target EUIs and allow them to input estimated EUI reductions based on actions they take (such as efficiency upgrades or electrification) plus any further reductions based on renewable energy production. The tool will forecast potential financial penalties for the Building Owner if they don't meet their targets. The calculator will include a step-by-step functionality along with instructions and a user video or guide.

The project team may provide additional trainings, programmatic resources and materials aimed at educating and engaging stakeholders about the building performance requirements. These materials may include but are not limited to:

- Webinars and workshops geared to energy managers that provide tips and tools on how to comply with a building's performance requirements.
- An on-demand video series that explains the rules of the building performance policy and how it works, processes to follow to ensure compliance or to apply for an alternate compliance option, and potential penalties for failing to meet EUI targets.
- Policy compliance checklists and FAQs: Providing simple, easy-to-use resources describing BPP compliance scenarios and pathways, and compliance with other policies as determined by the City of Denver.
- Developing, hosting, and continually updating a data visualization platform.
  - This may include providing building status details through the Touchstone Building lookup tool such as compliance status and details on performance path options.
  - This may also include providing Touchstone IQ for Buildings to a select group of Under Resourced buildings providing full benchmarking service, virtual energy assessment and a dashboard management tool for tracking progress.
    - This platform includes the ability to provide direct information around available resources to support energy efficiency implementation (incentives, financing, etc.).

- Providing a performance path tool guiding building owners on path options to meet their BPP requirements and internal climate action goals.
- Creating technical guidance PDFs for upgrades / measures. These primers will provide guidance related to retrofitting major building systems (envelope, ventilation, heating/cooling, domestic hot water, plugs, and process loads), implementing strategies to decrease energy-related operating costs, and providing estimations of potential savings, and assessing high-performance building technology solutions.
- Case Studies: Publishing at least one case study for each priority building typology that validates BPS policy objectives and high-performance building solutions.
- Providing guidance to help building owners navigate existing financial tools and opportunities.

Communications Plan Execution
Touchstone IQ will continue to work with the City to execute the communications plan and schedule to reach all buildings covered by the Energize Denver Program. Touchstone IQ will conduct targeted email campaigns to Building Owners based on factors such as the percentage a building is off from a target. Touchstone IQ will also conduct phone outreach as needed to inform building owners about the performance requirements.

Program Design Ongoing Updates
Touchstone IQ will manage and maintain a program design document that defines program details, requirements, implementation plans, and the scope of general support services and levels of support to be offered to all buildings that are covered by the BPP. Touchstone IQ will define program management plans and program schedules as well as manage and maintain a program manual and continue to develop and document processes for providing services as the program is built out.

Trade Ally Network
Touchstone IQ will create a Trade Ally Network consisting of service providers and contractors that offer services related to benchmarking and building performance requirements compliance. The Trade Ally Network will be a publicly available online database, allowing users to search for providers based on a number of parameters (services, building size, building type, etc.). The Trade Ally Network will replace the existing Directory of Trained Service Providers, if desired by the City.

Touchstone IQ will conduct outreach to identify and recruit candidates for the Trade Ally Network, ensuring a robust database is created offering a wide range of services to all building types. Outreach will consist of communications with the existing Directory of Trained Service Providers, leveraging Touchstone IQ and City relationships with trade organizations, and engagement with local contractors.

Annually, Touchstone IQ will review the Trade Ally Network to ensure accuracy. Participants will be contacted to confirm contact information and service offerings, removing nonresponsive providers. Following annual cleanup, the database will be assessed for comprehensiveness, identifying if additional recruitment is needed.

Sub Task 3: Energize Denver Resource Hub - Equity Priority Buildings Services

Touchstone IQ will work with the City to design programming and develop materials for the implementation of Equity Priority Buildings (EPB) services. These services will include targeted program outreach, use of Touchstone IQ for Buildings, and advanced technical support for buildings identified as EPBs. It is likely that Touchstone IQ will partner with several subcontractors to complete various scopes within this Sub Task.

CASR will define which buildings 25,000 square feet and larger could qualify for the Equity Priority Building compliance assistance program for outreach purposes and once the buildings apply for services, CASR will approve all applications.

Service Levels

All approved EPBs will have access to Service Levels 1-4 but may not need to utilize them depending on their building's performance and needs. It is intended for a building to move through the Service Levels in ascending order to efficiently utilize the service offerings at higher levels.

Service Level	Services
Level 0	• Outreach and recruitment to all potential EPBs
Level 1	• Advanced benchmarking services (verification of current and past benchmarking data and ESPM account set up) • Touchstone IQ for Buildings Account Set Up • Target Adjustments
Level 2	• Virtual Energy Assessment • Self-Serve Resource Delivery
Level 3	• On-Site Energy Audit resulting in a Building Performance Plan
Level 4	• Enhanced Account Management and Coaching • Financial/Incentive Consulting • Renewables Consulting • Data verification for future evaluation years

Level 0

Service Level 0 will focus on targeting outreach to all potential EPBs and recruiting them for program. This will primarily consist of outreach through various channels, outlined below, in attempt to inform the potential EPBs of the program requirements, available resources, and application process.

Outreach to EPBs will align with standard benchmarking and building performance requirements outreach, commencing in Q1 2023, and continuing throughout the year. The timeline will begin again on the same schedule in subsequent years.

Email Campaigns

Mass communication email campaigns will be sent to all contacts associated with potentials EPBs. The campaigns will be created in the Energize Denver account of Touchstone using the Email Templates and Mass Communication functionality. An email template will be created directing the contact to the web based EPB Eligibility Application.

Phone Calls

Direct phone calls will be made to contacts associated with potential EPBs who have not submitted an EPB Eligibility Application. Staff will describe the program requirements and the additional services offered to EPBs. Staff will either direct the contact to the EPB Eligibility Application or send a follow-up email with a link to the application site.

Physical Mail

For any remaining buildings that have not submitted an EPB Eligibility Application or with contacts that were not reached via a phone call, a physical mail campaign will be created to send information to each address associated with the buildings in the Energize Denver account (mailer costs to be covered by Denver outside of this contract i.e., letter creation, postage, etc.). The information will include a description of the program requirements and services being offered to EPBs and will direct the reader to the EPB page of the Energize Denver Hub website.

Site Visits

Site visits will be conducted when determined necessary for potential EPBs that have been unresponsive to all prior communication methods. Site visits may be prioritized based on serval factors, such as: distance from targets, historical benchmarking statuses, location, etc. The objective of the site visit will be to obtain building contact information, inform the contact of the program requirements and services offered to EPBs, submit the EPB Eligibility Application, and schedule a follow-up meeting for next steps (mileage and gas reimbursement costs to be covered by Denver within this contract).

Each outreach method will drive the EPB contact to a web based EPB Eligibility Application, which will be used to collect contact information and details about the EPB to determine eligibility. When submitted, the application form will automatically be synced in Touchstone to create a notification and reminder for a CASR staff person to review the application.

If the application is denied due to the building not being considered equity priority, the contact will be directed to the standard Help Center services and resources that are available to all buildings. If the application is approved, the contact will be assigned a single Touchstone IQ Account Manager to provide the services described in Levels 1-4.

Level 1

A Touchstone IQ Account Manager will be assigned to an approved EPB at Level 0 and will work with the building at all Service Levels, throughout the building's experience in the compliance assistance program. The Account Manager will be the main point of contact for the EPB as well as the liaison between the building and contacts associated with the other Service Levels (energy audit engineer, financial consultant, renewables consultant, etc.). The Account Manager will schedule quarterly check-ins with the EPB to discuss updates on various aspects of the building's compliance strategy and progress towards its goals, moving the building through the Service Levels.

Touchstone IQ for Buildings Account Creation & Kick Off Call

Once a building has been approved as an EPB, the building contact will be prompted to schedule a kick-off call with their Account Manager. Prior to the kick-off call, the Account Manager will create an account for the building owner in Touchstone IQ for Buildings using the information provided in the EPB Eligibility Application. The building owner will be notified with their login information and the Account Manager will take the building owner through the Touchstone IQ for Buildings account on the first call.

Prior to the kick-off call, the Account Manager will look up the building in the Energize Denver account in Touchstone to determine if the building is in Benchmarking compliance. If the building has not been submitted, it will receive full-service benchmarking support. If the building is in compliance or pending revisions, the Account Manager will sync their existing ESPM account with Touchstone.

During the call, the Account Manager will again explain the Energize Denver requirements and services they'll be receiving through the EPB program. The Account Manager will also outline an estimated timeline associated with each Service Level.

Full-Service Benchmarking Support

On the kick-off call, the Account Manager will collect the necessary information about the building to set it up in the Touchstone IQ for Buildings. This will include specific details about the physical building and operation. The Account Manager will take extra care to ensure that square footage and building type data are entered accurately. They will also initiate the utility data collection process through any auto-upload service provided by the utility, or through manual data upload. Depending on the complexity of the utility data upload process, additional follow-up calls may be necessary. After the utility data has been uploaded, the Account Manager will assist in submitting the benchmarking data as applicable.

Touchstone IQ for Buildings & ESPM Sync

During the kick-off call, the Account Manager will collect the building owner's ESPM login information. They will sync the existing building data from ESPM into the building owner's account in Touchstone IQ for Buildings. If the building was shown with a benchmarking compliance status of pending revisions, the Account Manager will work with the building owner to resolve the issue(s) and submit an updated report from Touchstone IQ for Buildings.

Benchmarking Data & Building Performance Requirements Review

The Account Manager will then review the data entered into Touchstone IQ for Buildings with the building owner. This will include a review of the targets needed to be met for compliance with the building performance requirements. Each target will be evaluated to determine how far off the building is currently from meeting the next target. During this evaluation, the Alternate Compliance Options (ACOs) will be introduced and considered. For each ACO, the required documentation will be explained to the building owner with a description of the level of complexity needed to compile the documentation to apply. If an ACO is determined to be necessary, the Account Manager will assist the building owner with applying for the preferred ACO and collecting the required documentation.

On an annual basis the Account Manager will schedule a call to summarize the previous year's benchmarking data and assist in submitting the annual benchmarking report for compliance.

Level 2

Virtual Energy Assessment Questionnaire

The Virtual Energy Assessment Questionnaire is a set of up to 43 questions about the equipment and operation of the building. The questions are intended to be high-level, but it is recommended that the building owner be somewhat familiar with their building's information. Completing the Questionnaire will provide the building owner with a set of recommendations to improve the energy performance of their building.

Virtual Energy Assessment Review & Building Performance Requirements Support

The Account Manager will review the results of the Virtual Energy Assessment. The results include a set of building-specific recommendations for how to improve the energy performance of the building based on the responses given during the Questionnaire. Each recommendation includes a description for the improvement, a range of estimated energy and cost savings, a range of estimated implementation costs, and a range of estimated financial simple payback timeframes. Each recommendation will be reviewed with the building owner to determine the feasibility of each recommendation. If it is determined that a recommendation is feasible, additional information could be requested in order to revise the estimated energy savings, cost savings, and implementation costs.

The selected recommendations from the Virtual Energy Assessment will then be analyzed to determine if each will significantly impact the buildings performance with respect to meeting the Building Performance Requirements. The analysis will include converting the revised estimated energy savings from the recommendation to the estimated annual energy use intensity (EUI) reduction. This EUI reduction will then be applied to the most recently reported weather normalized site EUI metric to determine the proposed EUI. The proposed EUI will then be compared against the interim and final targets for the building performance requirements. Each recommendation will be analyzed in this manner in order to create a list of the selected recommendations can be implemented to meet the requirements. The lowest cost recommendations will be prioritized to ensure the most significant impact is made on the building performance at the lowest cost.

After the list of recommendations for implementation has been finalized, the Account Manager will use the list to create the building performance requirement goals for the building in Touchstone IQ for Buildings. Each recommendation will be created as a project under the goals and will be prioritized based on ease of implementation and how quickly it can be implemented. The due date for each project will be assigned accordingly.

Self Service Resource Delivery

The Account Manager will also review financial resources and technical guidance documentation with the building owner on the Virtual Energy Assessment Questionnaire call, and will upload the financial resources and technical one-pagers to the Touchstone IQ for Buildings account. The financial resources documentation includes information about various rebates and incentives for energy efficiency upgrade projects. The technical guidance provides information about the Estimated Implementation Cost, Whole-Building Energy Savings, and the Estimated Simple Payback of various energy efficiency upgrade projects.

Level 3

On-Site Energy Audit

Touchstone IQ will partner with Group14 Engineering and/or other subcontractors as approved by the City to provide on-site energy audits and additional technical support for EPBs. Touchstone IQ and contractors will leverage relationships they have built with entities such as the Denver Housing Authority and Energy Outreach Colorado to conduct plan reviews and on-site energy audits.

The scope of the on-site energy audits and reporting may slightly differ based on the building's anticipated compliance needs, but at a minimum must meet the minimum requirements of energy audits in the Energize Denver Benchmarking and Energy Performance Requirements Technical Guidance, timeline adjustment documentation, and an executive level Compliance Plan. Energy audit costs will vary based on support type, building size, number of electrification feasibility reports (EFR) needed, and additional custom scopes and will be determined by the vendor with approval by CASR.

Using in-depth data collection, data quality assurance testing and engineering analysis, auditors will develop longer term portfolio carbon reduction plans for each EPB consisting of cost-effective energy efficiency projects and estimated energy savings. Analysis will include the evaluation of the potential for electrification of some or all of the appropriate building systems. The estimated energy savings for each project will be used to determine the resulting EUI reduction and impact toward meeting the building performance requirements. The energy efficiency projects will be prioritized based on the lowest cost to meet the interim and final targets. Next steps will be laid out within the Compliance Plan section, which will identify 1. benchmarking data corrections Target

Adjustments needed, 2. low-cost/no-cost projects with good payback periods, and 3. capital intensive projects that will need to be implemented at end of system life and renewables needed to fill their performance gap. Additional information will be provided regarding financial resources available to assist with the implementation cost of each project (rebates, grants, utility incentives, etc.).

Level 4

Enhanced Account Management and Coaching

Once the building has completed Level 3, the Account Manager and building contact will use the energy audit to create a Building Performance Plan and determine next steps. Next steps may consist of converting energy audit findings into biddable scopes of work, securing financing, and/or exploring renewables depending on feasibility and the building's preference. For buildings choosing to pursue energy audit recommend projects, the Account Manager will assist in converting energy audit findings into biddable scopes of work, including the steps necessary to complete the implementation and the project schedule, connecting with qualified contractors, reviewing bids, and selecting a contractor.

Financial/Incentive Consulting

A financial consultant from Touchstone will be available to all approved EPBs seeking additional support in navigating financial resources as they relate to complying with the building performance requirements. Services will include assistance in finding, applying for, securing, and managing financial resources, including rebated, incentives, and financing. The financial consultant will work with the building contact and Account Manager to better understand the building's current financial situation and Building Performance Plan in order to make a work-plan recommendation. A pilot program may be utilized during the first 6 months of launching this service to better assess the scope offerings.

Renewables Consulting

A renewables consultant from Touchstone will be available to all approved EPBs seeking additional assistance in pursuing renewables as they relate to complying with the building performance requirements. Services will include assistance in finding, applying for, and managing on-site and off-site renewable energy projects. The renewables consultant will work with the building contact, Account Manager, and financial consultant (if needed) to provide recommendations and guidance in utilizing renewables to fulfil the building's Performance Plan.

Data Verification for Evaluation Years

Third-party data verification is required for years in which performance is evaluated (2024/2025, 2027, 2030). Touchstone IQ will offer data verification for all approved EPBs, at no cost to the building, for their given evaluation years. Data verification will be initiated by a building's Account Manager during the annual reengagement correspondence that takes place at the beginning of each calendar year and will be dependent on building contact participation.

Sub Task 4: Energize Denver Resource Hub - Equity Priority Buildings Audits

Sub-task 4 will include all the services listed in Level 3 previously. Historically, the energy audit sub task budget has been included in Task 1.3 but is now separated into its own sub-task for the Fourth Amendatory Agreement for budget tracking purposes.

Task 1 Evaluation

Touchstone IQ will work in collaboration with the City to establish QA/QC procedures and KPIs for each Sub Task to help evaluate the efficacy of the Energize Denver Resource Hub. The details of the QA/QC and KPIs will be defined within the SOP for each Sub Task and/or sub-component. At a minimum, the Sub Tasks in Task 1 will be held to the standards outlined in the Quality Assurance section.

TASK 2: ENERGIZE DENVER SMALL BUILDINGS RESOURCE HUB

The Energize Denver Ordinance requires small commercial and multifamily building owners (5,000 – 24,999 square feet in area) to meet prescriptive performance requirements to reduce energy usage. Small buildings meeting these criteria must meet ***one*** of the following requirements to comply with the Ordinance:

1. Certify that a minimum of 90% of the lighting load is provided by LED lighting or that they have achieved an equivalent lighting power density to what 90% coverage of lighting load by LEDs would have resulted in; or
2. Source 20% of energy needs from on- or off-site renewables.

Approximately 8,000 small commercial and multifamily buildings in the City and County of Denver must comply with this Ordinance between now and the end of 2027. The breakdown of these nearly 8,000 buildings is as follows:

Building Type	Total Number of Bldgs.	% of Total
Warehouse	1,282	16%
Residential Condominium	1,178	15%
Residential Apartment	2,339	30%
Commercial Retail	722	9%
Commercial Office	716	9%
Restaurant	266	3%
Worship Facility	254	3%
Auto Service Garage	115	2%
Factory	110	2%
Other	829	11%

The compliance deadline for these requirements varies based upon the square footage of the building as detailed below:

Building Size (sq ft)	Compliance Deadline
15,001 – 24,999	December 31, 2025

10,001 – 15,000	December 31, 2026
5,000 – 10,000	December 31, 2027

Touchstone IQ will establish and maintain a Resource Hub which will provide customer service, represent the City in all communications around the small building requirements and serve as the main point of contact for Small Building Owners and property managers required to bring their building into compliance, and include a central, online system which will have a database for all information related to compliance for small buildings, and provide a staff point of contact for building owners to ask questions and receive basic assistance on how to submit the documentation to prove compliance. The Resource Hub will also include an online portal for small building owners to access compliance status information about their building, submit compliance-related documentation, and successfully demonstrate their building' compliance with requirements.
Hub Services are broken down into two tasks with specific deliverables:

- Sub Task 1: Energize Denver Small Buildings Resource Hub - Development and Administration
    - Creation and administration of a customer relationship management (CRM) and compliance tracking system
    - Data management
    - Compliance submission review and processing
    - Recording of estimated energy savings obtained from compliance requirements

- Sub Task 2: Energize Denver Small Buildings Resource Hub – Help Center Services
    - Develop communication tools and administer communications
    - Content development and maintenance
    - General assistance
    - One-on-One Consultative Services

Touchstone IQ for Governments Compliance Tracking System
Touchstone will utilize our existing Touchstone IQ for Governments SaaS platform to manage all information related to buildings that must comply with the Energize Denver small building requirements. This will include updating the configuration of the platform to track and manage small building compliance for this program. Touchstone IQ staff shall update the small building database (currently in Microsoft Excel) with corrected/new building information as it's received from Building Owners and property managers. For example, in some instances Building Owners will provide a corrected building address, in others they will provide new ownership information if the property has sold. Resource Hub employees update this information in the database and keep data clean and accurate once adjustments have been made.

The data fields to be maintained for each building are listed in *Attachment 1 – DBID Data Fields*. Touchstone will allow the for the ability to create custom report types and dashboards based upon the DBID data fields (i.e., user defines the set of records and fields available to a report/dashboard based on the relationships between a primary object and its related objects; reports display only records that meet the criteria defined in the report type). Details of the CRM requirements can be found in *Attachment 3 – Requirements Traceability Matrix*.

The data will be available to City staff and designated contractors to ensure others working with building owners know current status and project timelines.

Data Management

Touchstone IQ staff shall maintain accuracy and validity of the data within Touchstone and shall update and correct information in the database on an ongoing basis. Sometimes, new Denver Building IDs (DBID) will need to be created in the system when a Building Owner reaches out about a new or existing building that should have a DBID but does not.

DBID Profile Data Fields

- Building ID
- Building Address
- Owner name
- Owner Address
- Owner email
- Owner phone
- Secondary Contact name
- Secondary contact address
- Secondary contact email
- Secondary contact phone
- Gross square footage of building
- Building type
- Year of building construction/remodel
- Census Tract of building
- Compliance status
- Compliance pathway chosen
- Estimated energy savings from energy efficiency upgrades
- Estimated on-site renewable energy generation
- Estimated off-site renewable energy usage
- Total penalties assessed
- Building Claimed (y/n)
- Building identified as Equity Priority Building (EPB) (yes/no)
- Number & Type of Help Desk Inquiries
- Statistical Neighborhood of Building

Twice each year the database shall be updated with new assessor data from the City, and the Resource Hub must identify which buildings have had an ownership change based on the new data provided and what is stored in the database. Ownership information should only be updated in the database for buildings that have had an ownership change. Previously unidentified buildings that meet the small building criteria may also be discovered, for which new profiles with assigned DBIDs will need to be created. The Resource Hub will need to complete additional steps to identify new owners of condominiums (Condo Associations) by looking up individual condominiums on the Secretary of State website to manually retrieve ownership information.

Covered Buildings List

The City has an initial covered buildings list in Microsoft Excel that identifies all buildings that are required to comply with the small building component of the Energize Denver ordinance. The Resource Hub will continue to update and refine this list and identify Building Owners associated with each building; this will include updating the list with new information from the Assessor's Office, such as changes in building ownership, changes in property management, building demolitions, updates to gross square footage, etc. Some parcels have multiple buildings on them and depending on how the buildings are metered and if they are connected or not, those multiple buildings will need to be added to the covered buildings list, associated with that parcel for compliance tracking purposes, and assigned their own DBID. The Resource Hub will help expand and improve upon the covered buildings list while helping owners understand if and when they need to comply.

Compliance Submission Review and Processing

Touchstone IQ will provide an online submission portal through which covered building owners submit their compliance documentation. Staff shall be responsible for reviewing compliance documentation submitted by building owners and checking for data errors/triggers and communicating errors with building owners in order to correct identified mistakes.

Touchstone IQ will work with the City of Denver team to determine the appropriate level of building records review required to stay within budget requirements while providing an acceptable level of data quality assurance. We propose starting with a deeper level of review and then scaling back to a "Quick Review" once an established threshold of Q/C compliance checks has been determined. The "Quick Review" will be used for the remaining submissions and only submissions flagged as high risk will receive the "Full Review". Touchstone will use learnings from the initial set of deeper reviews to determine indicators for "high risk" submission.

Touchstone's initial proposed review plan includes the following but is subject to change based on Q/C results, timing, and budget.

Bldg. Sq-ft	**Total # of Bldgs.**

15,001 - 24,999	~3,050
10,001 - 15,000	~1,629
5,000 - 10,000	~3,131

2025 Reporting Year (15,001 – 24,999 sq-ft)

- First 500 records – Full review
- Remaining records – Quick review
  - Touchstone IQ will target submissions flagged as high risk for Full Review
  - If Q/C compliance rate falls below acceptable level, the review level may go back to a full review requirement

2026 Reporting Year (10,001 – 15,000 sq-ft)

- First 500 records – Full review
- Remaining records – Quick review
  - Touchstone IQ will target submissions flagged as high risk for Full Review
  - If Q/C compliance rate falls below acceptable level, the review level may go back to a full review requirement

2027 Reporting Year (5,000 – 10,000 sq-ft)

- First 1,000 records – Full review
- Remaining records – Quick review
  - Touchstone IQ will target submissions flagged as high risk for Full Review
  - If Q/C compliance rate falls below acceptable level, the review level may go back to a full review requirement

All submitted compliance documentation shall be reviewed within 3 business days and responses sent to the Building Owner on what needs to be corrected for the building to comply with the requirements. Resource Hub employees shall regularly communicate with Building Owners to fix their reports and ensure that they can successfully submit. This initial process is covered in Attachment A, Future Process Flows, but may be modified once the Q/C flag and Full vs Quick review process is solidified.

The Resource Hub shall track the compliance status of all small buildings that must comply with the Energize Denver small building requirements and develop/manage an interactive map available for small building owners to check their own compliance status. Touchstone IQ proposed adding the small buildings to the existing Energize Denver public disclosure map.

Recording of Estimated Energy Savings Obtained from Compliance Requirements

The Resource Hub shall calculate estimated energy savings and estimated cost savings gained from energy efficiency upgrades implemented by buildings which comply with the ordinance. This information shall be part of the required compliance documentation submitted by building owners, and included on energy audits, lighting audits, or other documentation provided by the service provider implementing the energy efficiency upgrades. The Resource Hub shall gather this information from the compliance documentation to allow for a recording of estimated energy savings gained as a result of upgrades performed to comply with the Energize Denver small building requirements, and to estimate the associated cost savings for building owners based upon current energy rates. Touchstone IQ will provide data upload options to allow building owners to self-input energy savings data via an online form, portal or potentially Excel file upload process.

Sub Task 2: Energize Denver Small Buildings Resource Hub – Help Center Services

Help center services will include the following deliverables, but phasing and final scope will be developed throughout the life of the project.

This task includes:

- Develop communication tools and administer communications
- Content development and maintenance
- General assistance
- One-on-One Consultative Services

Develop Communication Tools and Administer Communications

Communication Tools

The Resource Hub shall utilize a variety of tools to communicate with Small Building Owners. Phone calls and emails shall be the primary form of communications. However, the Resource Hub shall also maintain a calendar where Small Building Owners are allowed to schedule appointments directly for one-on-one help with compliance requirements. Scheduled one-on-one help will be available to building owners with escalated issues that have not been able to be resolved through standard support paths (i.e., support materials, emails, phone).

Scheduled Outreach

The Resource Hub shall support scheduled outreach with Small Building Owners to notify them of upcoming compliance deadlines, using contact information collected in the database. While the City shall be responsible for sending paper mailers to building owners regarding compliance (approximately two times per year), the Resource Hub shall be responsible for pulling mailing lists from existing Microsoft Excel spreadsheets (and the future database solution scoped in Task I) that will be sent to the City, who will use this information to address the paper mailers. Mail lists only contain information for buildings for which the notices are applicable, i.e., only buildings that are still out of compliance. The contractor shall be responsible for checking and ensuring the accuracy of each list that is pulled.

Email compliance notifications shall be sent regularly by Touchstone IQ employees to all out-of-compliance buildings up until their deadline. Each time the City sends a paper mailer to a building owner, the Resource Hub shall send a corresponding email containing the same information. It is anticipated that email communications will be sent more frequently than paper mailers, possibly 4 – 5 times per year, and will include information such as available rebates, financial incentives, links to service providers, tips to comply with the ordinance requirements, etc. Resource Hub employees shall be responsible for making necessary edits to email compliance notices, sending drafts for review to the City, sending test emails for review to the City, and sending out approved notices.

Trained Service Provider List

The Resource Hub shall be responsible for maintaining the list of trained service providers. Service providers for energy audits, lighting upgrades and renewable energy installers/suppliers must name an Trained Service Provider. The Resource Hub shall update this list on at least a weekly basis as Service Providers become approved by the City.

Content Development and Maintenance

The Resource Hub shall assist in the development of content for small building owners to be hosted on the existing Energize Denver website (https://www.denvergov.org/Government/Agencies-Departments-Offices/Agencies-Departments-Offices-Directory/Climate-Action-Sustainability-Resiliency/High-Performance-Buildings-and-Homes/Energize-Denver-Hub/Buildings-5000-24999-sq.-ft). This website shall host information related to small building requirements, resources available to small building owners to support compliance, case studies and a map of all small buildings. The Resource Hub shall also review the small building portion of the Energize Denver website and suggests edits and improvements as and when appropriate.

The City shall be responsible for developing technical guidance and rulemaking for the Energize Denver small building requirements. Once finalized, the Resource Hub shall develop communication and learning materials that describe the policy and communicate its requirements to different building sectors, as well as produce educational materials that communicate the City's technical guidance and rulemaking through a variety of formats and media. Examples of materials to be developed:

- Resources for Building Owners informing them about their compliance options (including potential alternate compliance options), steps to comply (e.g., compliance checklists), frequently asked questions (FAQ), case studies, recorded webinars, and how-to videos. The objective is to translate the City's technical guidance into easy-to-understand education materials. These materials will be developed after the final rules and regulations for the small building requirements are finalized. Example Hub website include:
  - Energize Denver Webpage
  - The Boulder Hub
  - Washington, DC's Building Innovation Hub
  - St. Louis's Benchmarking website
- Available external resources and support for small building owners – information and links to external resources available to small building owners to comply with

requirements, including (but not limited to): financing options available for energy audits/upgrades for small building owners, free/subsidized energy audit and direct install programs for small building owners, and available rebates for LED lighting upgrades and renewable energy products/services. This information shall be organized and disaggregated by building type, building size, type of business housed in the building, or any other way that is easiest for building owners to understand what specific programs for which they may be eligible based upon their building's status. Accuracy of this information is expected to be checked (and updated as necessary) on at least a monthly basis

General Assistance

The Resource Hub shall provide exemplary service to small building owners, property managers and contractors, have a response time of two business day, and be staffed Monday through Friday from 9 AM to 5 PM.

The Resource Hub will be staffed by energy & sustainability customer support staff and/or other knowledgeable commercial building energy efficiency trained resources and have the ability to increase capacity during peak months (generally near compliance deadlines) as needed. To control costs more effectively, the Resource Hub will be staffed with multiple levels of customer support experience. This will allow for the escalation of more complex building owner questions to more seasoned/experienced customers support staff.

The Resource Hub shall provide the following types of assistance to building owners:

- Provide ad hoc compliance support (i.e., answering Building Owners' questions on how to comply with the ordinance, helping them understand the policy, and scheduling time with them to work through problems as they arise).
- Direct Building Owners to appropriate resources available on the webpage and connecting them with community members and qualified service providers where applicable.
- Inform Building Owners of other City and County of Denver energy efficiency requirements affecting their building and direct toward resources. This includes Energize Denver Electrification requirements and resources on the website above. City Staff or contractors will provide this information and resources.
- Direct Building Owners to financial assistance that they qualify for (incentives, resources for planning).
- Light-touch support (e.g., linking building owners to existing documentation and guidance, FAQs, pre-recorded webinars, etc.)
- Development and administration of presentations, workshops, and trainings for general education. Presentations should be focused on the two defined compliance pathways (as well as alternative compliance pathways, to be defined in the final rulemaking in mid-2023) and break down the steps needed to achieve compliance.

One-on-One Consultative Services
A subset of small buildings shall require one-on-one consultative services provided by the Resource Hub to support them in compliance measures from start to finish. This includes support to building owners who are eligible for an alternate compliance option, as well as under-resourced building owners who require additional assistance to understand and implement the ordinance requirements, and building owners who require assistance in completing the required compliance documentation. Based upon the first year of Resource Hub support, it is expected that approximately 15% of building owners shall require some level of support from the Help Desk in 2025, increasing to approximately 20% of building owners requiring some type of support in 2026 and 2027.

Task 2 Evaluation
Touchstone IQ will work in collaboration with the City to establish QA/QC procedures and KPIs for each Sub Task to help evaluate the efficacy of the Energize Denver Small Buildings Resource Hub. The details of the QA/QC and KPIs will be defined within the SOP for each Sub Task and/or sub-component. At a minimum, the Sub Tasks in Task 2 will be held to the standards outlined in the Quality Assurance section.

TASK 3: TOUCHSTONE SUPPORT SYSTEMS
Software System Design Overview
The Touchstone IQ for Governments™ cloud-based SaaS solution automatically integrates with Portfolio Manager providing real-time tracking of building submission data. The system also facilitates communication tracking with building owners, provides marketing tools, and reporting, among other functionalities.

The Touchstone IQ for Governments™ software includes the following system functionalities.

- Tracking all past and current building data including, but not limited to:
    - Address, sq-ft, building ID, parcel number, GIS coordinates, etc.
- Tracking additional building data in custom database fields
- Tracking all past and current building contact info including, but not limited to:
    - Building owner, management company, Portfolio Manager consultant, condo association, designated representative, etc.
- Auto-integration with Portfolio Manager reporting
    - Automatic nightly download of new building report submissions
    - Year-over-year tracking of all Portfolio Manager report data
- Auto-integration with online waiver or exemption and extension request forms
- Auto-integration with an online Claim My Building form
- Automatically scan imported benchmark submissions for 40+ errors beyond Portfolio Manager's checks.

- Examples - EUI outside normal range, abnormal score, non-matching sq-ft, unrealistic # of worker, unusual operating hours, missing utility data, etc.
- Creates customizable errors flags for Help Center staff review
  - Automated email response to building owners based on submission status or error flags
- Online City accessed customizable dashboard to monitor:
  - Percent approved, in-progress, denied, exempt, error flags, etc.
- API integration with City department data, where available (i.e., violation/fines, permitting, finance)
- Customizable reports for all data with a large set of pre-developed reports
- Email and Phone communication tracking
- Direct email generation for customer Help Center management and marketing/outreach
- Record modification tracking by user (i.e., track all changes to a building record)
- Automated building owner scorecards

Requirements Traceability Matrix

The attached Requirements Traceability Matrix (RTM) outlines in detail the needs of the City and Touchstone IQ's response to meeting those needs, the functionality detailed within the RTM is included as part of this scope of work.

Data Management

Data Export

Touchstone IQ for Governments™ will provide system wide Excel export capability, enabling all users with admin granted capability to easily export any or all benchmarking data. The data is also available from the system admin to export data into SQL database formats.

Covered Buildings List Maintenance

Touchstone IQ for Governments™ will provide both mass upload of an Excel based covered buildings list and manual entry of individual building data. The unlimited, relational database will store all building and contact information, link all data to the Denver building ID, and provide for expansion of the program over time, standard building data fields include but are not limited to:

- Building address
- Owner contact information including address
- Building type
- Gross square footage
- Latitude and longitude
- X and Y coordinates

Custom building data fields will be added to store additional data.

Pre-built API integrations will provide fast and easy connections with legacy City department data and systems, where available (i.e., violation/fines, permitting, finance). Integration with the City's finance department mirroring the current Salesforce integration design are included within implementation costs.

While Touchstone includes pre-built API integration capabilities, customization to interact with no API capable City legacy systems (i.e., permitting dept.) may incur additional integration costs.

Collection of Building Performance Data
Touchstone IQ for Governments™ will provide the ability to track building performance requirements. It is anticipated data will be collected through a building owner online submittal form allowing for an unlimited amount and type of documentation tracking. This can include documentation such as energy audit reports, energy product purchases, RECs, etc. that are filed directly to building owner records based on the unique building ID.

Dashboards

Through the Touchstone IQ for Governments customizable dashboard, Help Center and City staff can track building reporting overall progress metrics, dive into the details of specific buildings and easily track communications with building owners.
The dashboard tracks building reporting in real-time and enables users to quickly understand status using a variety of measures including but not limited to:

- Overall benchmarking compliance rate
- Overall building performance requirements compliance rates
- Average Energy Star Score overall or by building type
- Average EUI
- Emission metrics
- Energy use
- Monthly and daily call and email statistics
- Exemption request numbers and statuses

Reporting

Touchstone IQ for Governments™ includes a reporting tool that enables fast, accurate reporting on all aspects of the collected data and features. The system comes with standard reports as well as the ability to create and save custom reports. Report examples include:

- Compliance reports
- Building address & contacts
- Standard building energy & emissions report
- Exemption / extension reports
- Mailing list reports
- Ability to create custom reports with charts and graphics

All reports and data metrics can be exported into Excel or csv.

Grouping Individual Reports into a Portfolio

Touchstone IQ for Governments™ will group buildings into a portfolio using a variety of different criteria. Groups will be created using fully customizable tracking picklist fields. Typical groups include, but are not limited to:

- Use type
- Government type (city, federal, school, postal, etc.)
- Geographic region

The platform also features a parent-child building relationship structure that enables the individual tracking of multiple buildings on a parcel. This enables the reporting of multiple buildings to a single parent building ID.

CRM Capabilities

Touchstone IQ for Governments™ enables functionality such as self-service, standardized email response templates, automatic notifications, and consistent owner outreach. CRM functionality includes but is not limited to:

Customer Self-Service

The platform provides multiple pre-built and custom forms used for data collection as well as the distribution of data. Forms utilized for building data collection include but are not limited to:

- Exemption request online form
- Performance requirements data collection forms (i.e., energy audit, results, third party verification forms, et)
- Confidential data request online form
- EPB support request online form

Tracking Customer Contact Information

Touchstone IQ for Governments™ provides the ability for help desk agents to add or update building and contact information. The system can track multiple addresses for each building including property, owner, property manager, tax address, etc. The system can also track multiple contact types and create custom contact tracking fields.

Contact information is also updated automatically directly from Portfolio Manager submissions. Building owners also have the ability to update their contact information utilizing our online claim my building web form.

Tracking Customer Interactions

Touchstone IQ for Governments™ provides complete customer communication tracking capabilities. This includes tracking building owner inbound / outbound emails and phone interactions.

Inbound emails to the main program email account are displayed within the communications email dashboard. Customer service staff can respond to emails directly from the communication dashboard assigning inbound and corresponding outbound emails to the appropriate building record. Staff can also assign inbound emails to specific customer services staff allowing each staff member to have a set of emails they are personally assigned to manage.

Tracking of outbound calls can also be performed by customer service staff. Outbound call records are assigned to a building. Phone call tracking information includes call type, call contact, duration, and notes.

Customer services staff can also include notes on both a building as well as contacts. Notes records include free form text, attachments, and subject tracking.

A history tracking of all communications and edits made to building records

Customer Service Tickets

Touchstone IQ for Governments™ provides a customer service ticket process that automatically creates a service ticket, enables manual assignment of each ticket to an agent, provides best practice processes for ticket management, and automatically closes tickets upon completion of the process. Automatic ticket creation includes but is not limited to:

- General building owner inquiries
    - Phone
    - Email
- Exemption requests
- EPB support requests
- Confidential data requests
- Performance requirements data collection requests
- QA/QC flagged ESPM report submissions

Targeted Owner Communications

Touchstone IQ for Governments™ provides 30+ standard email templates and the ability to create an unlimited number of custom email templates. All email templates can easily be designed using a built-in email editor that allows the insertion of any field from the database.

Emails with building specific information can be sent to an individual owner, a targeted group of building contacts, or all building contacts depending on the communication type. Email templates and online forms are help desk best practices that improve efficiency, data accuracy, customer satisfaction, and compliance.

- Standard and custom email templates sent directly from the platform
- Automatically generated compliance and status email notifications to building owners
- Track phone interactions with building owners and directly send, receive, and track emails received from building owners

Mass Owner Communications and Marketing

Touchstone IQ for Governments™ includes a mass email communication and marketing campaign tool. This tool includes a built-in email template designer and mass email filter / pick list function

- Mass outbound communications
    - Ability to generate mass and targeted emails for marketing, outreach, and educational purposes
    - Ability to customize who receives the email based on a host of filter types such as
        - Compliance status, contact type, building type, size, government type, PM use type, extension status, etc.
- Track email open, closed, clicked, bounced rates
- Auto-generate and mass email building owner scorecards

Insightful Building Scorecards

Touchstone IQ for Governments™ automatically generates scorecards with building specific information and delivers them to individual building owners, improving customer satisfaction and driving energy efficiency adoption.

These customized scorecards are automatically sent via email as a pdf. attachment to owners upon closing of the annual benchmarking data set.

The scorecard designs are easily built utilizing the built-in scorecard designer tool. This tool allows staff to build custom scorecards utilizing a large set of design template, charts, graphics, metrics, and branding styles.

The scorecard lay-out and the information included is determined by City staff in collaboration with the Touchstone IQ implementation team and fully branded for the City. Scorecard data inputs include but are not limited to:

- Energy Star Score
- EUI
    - How their building Energy Star Score and EUI compares to peers by
        - Building type
        - Size
        - Neighborhood, etc.
- Savings potential (high level cost and payback information)
- Energy efficiency program support materials (rebates, incentive programs, PACE financing, etc.)

Different scorecards can easily be developed for presenting information that is relevant to buildings of different size, type, and score utilizing the built-in score card designer tool.

Real-Time Public Mapping

Touchstone will continue to support delivery of a customized web-based interactive map presenting individual building performance metrics. The interactive map design allows users to view building compliance statistics, Energy Star rating, EUI, as well as compare buildings by size, type, location, and numerous other data points. This data is compiled year-over-year to provide historical comparison ability.

The map integrates directly with the Touchstone IQ for Governments™ solution and updates automatically as new building reports are submitted. The map provides enhanced visuals, comparison capabilities, and reporting.

Maintenance and Technical Support

The annual license fee includes ongoing maintenance of the platform, functionality improvements and upgrades, and technical support. All code is tested on staging platforms prior to release, impact is assessed, and release date is determined. Feature and enhancement code updates are released on Sunday evenings. Bug fixes are applied immediately as needed with little to no disruption. Release notes are provided to all customers prior to the rollout of any new updates or bug fixes.

Workflow Management

Workflows are set up and managed within Touchstone IQ for Governments™ to allow for user customization on a number of process flows within the system. Workflows are managed through five key areas:

1) Submission Process Management
2) Quality Control Flags
3) Exemption, Extension, Claim My Building Processing
4) Ticketing Management
5) Email Communication

Touchstone IQ will provide design and workflow management documentation as part of the software solution implementation and data migration. This will include a system diagram, process flow charts, and data flow diagrams.

Submission Process Management

Submission processing is a user editable setup feature allowing for easy designation of which PM report to download nightly, and the process flow for automated compliance status changes (i.e., In-Compliance, Pending Resubmittal, Missing Building ID, Not Submitted).

Quality Control Flags

The QC flag process flow is also 100% editable by the user with the ability to edit, turn on, turn off, or create new QC flags. Users can create specific workflows by QC checks to initiate the automatic send of custom email templates and change building status.

Exemption Processing
This process utilizes an online form for real-time data collection with automated status changes, creation of tickets for user review, and closing of tickets upon approval/denial. Workflows for sending tickets to specific users when these processes are initiated is also available.

Ticketing Management
The ticket management system allows users to adjust workflows for numerous regular processes such as who received notices of new tickets and who receives specific tickets for various automated processes (i.e., missing building ID, exemption to review, QC flag tripped).

Email Communication
Email communications are also user defined. This includes editing existing and creating new email communication templates and designating each for various manual and automated processes. This includes designating email templates for automated processes such as, in-compliance, pending re-submittal, invalid ID, QC flags, exemption approved/denied, and scheduling mass email communications, among others.

System Integrations

Touchstone IQ for Governments™ includes the ability to integrate with outside software applications. This includes user configurable direct integrations and custom integration capabilities as detailed below.

User Configurable Integrations
1) ENERGY STAR data request (automated nightly download)
2) Formsite online forms (real-time)
3) Touchstone online map (real-time)
4) City email account (real-time)

Custom Integrations
1) Accounting systems (data transfer scheduled as needed)
2) Permitting systems (data transfer scheduled as needed)
3) Ad hoc City databases (data transfer scheduled as needed)

Custom integration options include direct API or flat file transfer through SFTP or similar cloud-based storage sites.

Sub Task 1: Touchstone Support Systems – Annual Software Licenses

The following software licenses will be utilized by Touchstone IQ to provide professional services for the management and implementation of the Energize Denver Resource Hub (Hub):

License	Occurrence
Touchstone IQ for Governments Software License	Annual

Touchstone IQ for Buildings Annual Software License (non EPB)	Annual, based on number of licenses used. Flat rate of $150/building
Hub License Fee	Annual

Sub Task 2: Touchstone Support Systems – Software Enhancements

Periodic software enhancements are anticipated as the Energize Denver program develops and evolves. Budget will be allocated to account for these expected software development needs, such as Portal enhancements, Touchstone IQ for Governments/Buildings customizations, MAI modifications, additional ACO options, online tool edits, etc. All software enhancements requested will be funded through this sub task, unless otherwise directed by the City.

Quality Assurance

The purpose of this section is to establish the goals, processes, and responsibilities required to implement effective quality assurance functions for the Energize Denver Benchmarking Help Center, Supporting Systems & Building Resource Hub project (Energize Denver).

This section provides the framework necessary to ensure a consistent approach to program data and software quality assurance throughout the project life cycle. It defines the approach that will be used by the software quality personnel to monitor and assess software development processes and products to provide objective insight into the maturity and quality of the software. This will also include general program data quality assurance for the program management team.

This covers quality assurance activities throughout the migration of the existing Salesforce system to Touchstone CS module, HUB design, implementation, and ongoing management of the Energize Denver Program.

REFERENCE DOCUMENTS

The following documents were used or referenced in the development of this plan:

- IEEE STD 730-2002, IEEE Standard for Software Quality Assurance Plans
- Energize Denver Statement of Work (SOW)
- Energize Denver Service Level Agreement Template

QUALITY GOALS AND EXPECTATIONS

Touchstone IQ Consulting and Touchstone staff are responsible for management and maintenance of all systems, the Help Center, and the Resource Hub. Anytime adjustments are made to these resources, the City will be notified ahead of time. The City will be kept up to date with happenings in the Help Center and issues with the system. Anytime an issue arises the City will be notified of the problem as well as the ETA for resolving the issue.

- The City will see all changes made to public facing systems (Energize Denver Map, Building Owner Portal, Resource Hub website etc.) in a test environment before changes are pushed to the production environment.
- Touchstone IQ will send all changes for public facing systems to the City for approval before implementation.
- Touchstone IQ will fix system errors in a 24-48-hour window.
- The City will be provided reports of Uptime vs Downtown of systems and websites each month.
- Touchstone IQ will ensure accurate data is obtained from Building Owners and that accurate information is always displayed publicly (i.e., scorecards and Energize Denver Map).

PROGRAM DATA QUALITY CONTROL

The following details our plan to ensure accurate program data quality. This plan includes both built-in automated quality control functionalities as well as program quality control steps executed by program management staff throughout the life of the program.

Benchmarking Report Quality Control Activities

Automated Alerts and Flags

Touchstone IQ for Governments™ has an extensive set of fully customizable Alerts & Flags (45+ flags) that are used to ensure accurate data is being reported from building owners and accepted by the City. Touchstone IQ for Governments™ automatically scans imported benchmark submissions for 45+ quality control errors beyond Portfolio Manager's checks and automatically sends email notifications in real-time to building owners with correction guidance, increasing data accuracy and compliance. This functionality completely removes the Help Center's manual review and correspondence time associated with quality control checking activities. The QC data checks include, but are not limited to:

- EUI outside normal range
- abnormal score
- Non-matching sq-ft
- Unrealistic # of workers
- Unusual operating hours
- No or missing utility data

The threshold values identified by each alert and flag can be set by the City of Denver and adjusted at any point. Each alert and flag have a corresponding email template that is automatically generated and sent when a benchmarking report syncs into our system and trips the specified alert or flag. The automated emails allow for real time feedback and transparency with building owners, quickly alerting them to the issue(s) and providing instructions on how to resolve the problem. Flags can also be bypassed on an individual building basis so that they don't trip an incorrect flag in following years (i.e., all electric buildings tripping "No Gas" flag).

QC checks can utilize a variety of logic including but not limited to:

- Confirming valid data in specified fields
- Confirming timing data
- Confirming values fall within boundaries
- Comparing values between time periods
- Comparing values from different fields

Each alert can also initiate a customer service ticket, which can be automatically or manually assigned to a Help Center staff for regular follow up and check in for building data accuracy.

The QC flag process flow is 100% editable by the user with the ability to edit, turn on, turn off, or create new QC flags. Users can create specific workflows by QC checks to initiate the automatic send of custom email templates and change building status.

Pending Revisions Ongoing Support

Building that have submitted to the City's data request and trip one of the systems data quality flags will be automatically moved into the Pending Revisions status. These building's will receive an automated email detailing their issue and corrective action but will also receive follow-up from Help Center staff if the building has not resubmitted in a timely manner. Help Center staff will perform additional email and phone outreach to "Pending Revision" status buildings every two weeks to provide additional compliance support and ensure a high level of data accuracy.

Building Data and Contact Information Update and Quality Control Activities

Automated Contact and Building Data Information Update Activities

Touchstone IQ for Governments™ automates the updating of building owner contact information through multiples activities this includes

1) Contact update from Portfolio Manager
    a. Touchstone IQ for Governments™ automatically adds and/or updates existing contact information as building owners submit to reports to the Portfolio Manager Data Request
    b. This includes building addresses, owner contact, submitter contract, third party verifier contact, building characteristics, and other building contacts.
    c. This process takes place every 24 hours.
2) Contact update through "Claim My Building" portal
    a. Building owners can update their contact information through the online "Claim My Building" portal
        i. Update requests are viewed and verified by help center staff prior to approval
3) Contact update through exemption, extension, claim my building submissions, etc.
    a. Touchstone CS automatically creates a contact from forms submitted if no duplicate is present. This ensures that all contacts are added to Touchstone CS and associated with a property.

Semi-Automated Contact and Building Data Information Update Activities

1) Regular (quarterly or more often as needed) owner information update from Assessor data
    a. The Touchstone CS building and contact uploader tool allows for easy update of building and contact information from standard assessor spreadsheet reports. The information will be compared to the existing data in the system and updated automatically through Touchstone CS spreadsheet upload and data matching tool.
    b. Touchstone CS matches against existing data and only updates when new assessor information is present.

c. This entails adding new owner information and addresses, marking old owner addresses as do not mail or deleted, and updating building characteristics, etc.

Manual Contact and Building Data Information Update Activities

1) Touchstone IQ for Governments™ has a built-in contact generation tool that initiates anytime an email is sent that is associated with a building. This ensure we collect any new contact that would be related to a building during all Help Center email activities.
2) Help Desk staff will confirm all building use details and building contacts when assisting building owners/contacts via phone or email, or when manually reviewing a submission.

Automatic Contact and Building Data Information Quality Control Activities

1) For a correspondence (call or email) to be logged in Touchstone IQ for Governments™, it must be associated with a new or existing contact.
    a. This ensures all email and phone communications result in the creation of a contact.

Semi-Automated Contact and Building Data Quality Control Activities

1) All replies and bounce backs from mass communications sent to groups of contacts from Touchstone IQ for Governments™ are tracked in the system. Touchstone IQ will use this information to update, add, and remove contacts to ensure that only the most recent and up-to-date contacts are being communicated with.
    a. Touchstone's built-in Communications tool provides data on open rates, click rates, bounce backs, emails flagged as spam, and emails sent from Touchstone that have been blocked. This provides greater insights into the quality of the contact information.

Program Communication Quality Control Activities

Throughout the contract duration, Touchstone IQ and the City will collaborate on numerous communication plan cycles and messaging campaigns. These communications will be in the form of physical mailers, emails, phone call outreach, site visits, and mixed multimedia outlets among others.

The quality and effectiveness of communications and outreach support will be assessed by the vendor through qualitative and quantitative KPIs established recommended by the vendor and approved by the City for each contract Task. KPIs will focus on gauging building owner awareness and understanding of the Energize Denver program requirements, with the intent to increase knowledge and compliance overtime. The KPIs, execution, and status deliverables will be further defined in the SOPs created for each Sub Task, when deemed necessary by the City. KPIs will be evaluated monthly to convey the success or failure of the strategy and/or execution and adjusted as needed.

Additional Program Manual Quality Assurance Checks and Reporting

1) Touchstone IQ Staff will perform reoccurring monthly manual data quality control checks in the following key areas. This will be performed using spot check reports and manual spot check reviews of data from both sources.
    a. Database and UBID status accuracy
    b. Portfolio Manager integration accuracy
    c. Map data integration accuracy
2) Reports will be provided monthly to Denver staff detailing any data inconsistencies or functionality problems
3) Building address, contacts, ownership, and general building errors will be manually checked and updated through an annual data cleaning process.
    a. This will be performed prior to the launch of each new program year.
4) Program Management staff will also perform call center staff oversight QA check.
    a. This will include shadowing phone calls and spot-checking building records and how individual call center staff are tracking interactions.

QA/QC Failure Identification and Reconciliation

Touchstone IQ Management staff will perform monthly manual QA/QC checks on the items listed above to confirm our quality control processes are being followed and accurately executed. This will include reviewing sample sets of help center staff work, automated QC workflows and manual QC workflows.

In the event a QA/QC process fails, the management will inform City staff and provide a corrective action solution and recommended process improvement to ensure the issue does not occur again.

SOFTWARE MONITORING & UPDATES

Touchstone IQ will provide the City access to our system status website where the status of each system will be displayed, and real-time uptime data will be provided. City users registered on the website can choose to receive email notifications of all system issues and updates, along with fix details and timing. Touchstone IQ will configure the notification system to send a monthly status report to the City detailing the system status report.

All software updates are thoroughly tested within Touchstone's staging site prior to public launch. This includes both the internal city/state facing systems as well as public facing tools such as maps, building ID lookups, forms, etc. As part of the Touchstone IQ for Governments™ development pipeline and software update program, customers receive notices of all planned software updates. This includes details on what new functionalities are included within the update, bug fixes, time of update and planned service outages. All updates are schedule over the weekend and typically have no user outage impact. Any requested approved updates by the City will be implemented within the planned update schedule or within interim updates if deemed critical to meeting program scope items.

SOFTWARE TESTING & REVIEWS

This section identifies the number and type of tests and engineering peer reviews that Touchstone will perform when updating software code, creating new enhancements and general software product implementations. It describes the artifact types to be reviewed as well as the format of the reviews that will be conducted. Software reviews are performed during the following keys actions.

1) Migration of data or setup of new client system
2) Update releases to existing software code
    a. Bug / issue fixes
    b. New software features or enhancements
    c. General maintenance
    d. Client requested new functionalities or updates

Testing shall include both developmental testing as well as acceptance level testing. For each type, the scope of testing is defined as well as the responsible parties. The objective of the activities in this section is to validate the application meets requirements and ensures errors or incorrect data is identified and corrected.

Unit Testing

Objective

Unit testing is intended to exercise and validate the smallest testable element (units) of the modified software and involves testing the internal structure such as logic and data flow, and the unit's function and observable behaviors. The goal is to ensure the unit (component) implemented by the developer behaves as designed, and through knowledge of the internal structure of the code, that the developer has validated all decision paths through the code.

Benefits

Unit Testing establishes that the selected code operates as designed.

Responsibility

- Developers are responsible for executing unit tests against their developed components
- Unit tests must meet unit testing standards to be developed for the project
- Designers may specify additional unit test requirements for the developers to meet
- Developers will certify that the unit testing was performed according to the standards, guidelines and additional requirements identified

Activities

- Define unit testing to be performed
- Implement the code and conduct unit tests
- Correct defects found

- Certify completion of unit testing

Build and Deployment Staging Site Testing

Objective

The objective of build and deployment testing is to verify the build work functions as designed within a staging environment prior to release to production. Issues identified during this process indicate additional detail being needed in the instructions, updates to code to address bugs / issues, or a need to assess the complexity of the product configuration.

Benefits

Quickly establishes issues related to an update or enhancement without affecting production environment.

Responsibility

- Touchstone will deliver source code through their demo environment at the completion of each construction iteration
- Technical and internal Touchstone execution staff review functionality to ensure it meets desired scope with no issues
- Technical Staff write a brief build and deployment test report documenting any difficulties encountered in the build/deployment procedures.

Activities

- Build and deploy the application in the staging environment
- Execute tests to validate load & performance criteria identified in supplementary specifications.
- Incorporate findings in the Test Evaluation Report.
- Record build or installation defects found.

Business Functional Testing (BFT)

Objective

Ensure the delivered application release meets all the functional requirements as defined in the requirements specification documents within the staging environment

Benefits

This is the final testing cycle performed by Touchstone and customer staff (when applicable) prior to releasing the code to the production environment.

Responsibility

- Touchstone dedicated business functional tester resources will execute the tests for each release.
- Customer identified functional tester execute tests for each release (when applicable)
- Testers log defects identified during BFT.
- Developers analyze and resolve logged defects.
- The program manager manages execution of testing and documents results in the test evaluation summary report.

Activities

- Execute the defined tests.
- Record and work with developers to resolve identified defects
- Recomplete testing steps upon update of correction activities
- Document approval of update or adjustment required prior to release

Production Environment Release

Objective

Release of fully tested build to the production environment with no or minimal impact to customer.

Benefits

This will ensure the final application is of high quality, will not produce any surprises, and will have minimal or no impact to customer experience and product use.

Responsibility

- Touchstone to deliver release notes and details on impact of update to customer
- Update details (enhancement, bug fix, etc.)
- i.e., update time / date
- Any projected service outage during update
- Update user manual
- Touchstone to perform final acceptance testing post production release to ensure not discrepancy between staging and production environment.

Activities

- Provide release notes to customer
- Release build during designed time
- Validate the application meets the established acceptance criteria
- Issue the Acceptance Test report

PROBLEM REPORTING AND CORRECTIVE ACTION

This section defines the problem reporting process and corrective action procedure to be used by the customer when issues have been identified. Touchstone CS includes a built-in customer interaction ticketing systems designed to both answer software functionality questions as well as to report and track software issues.

Reporting and Corrective Action Steps

Issues related to software functionality, requested enhancements or general bugs can be reported through two paths.

- Path 1: Client ticketing system: This allows for tracking of any software issues, requested updates / modifications and resolution tracking.
    - Customer reports issue or request through the Touchstone CS ticketing system. Tickets are classified by priority level and type. Priority levels include:
        - Low, Medium, High, Emergency/Urgent

- Tickets are routed to the following designated Touchstone reviewer depending on the level of priority
  - Customer Program Manager, Help Center Admin, Director of Software Development, etc.
- The designated contact representative provides feedback to the submitter within the defined amount of time detailed within the Service Level Agreement
- Tickets, corrective actions, and status are tracked within the customer accessible ticketing system until resolved

- Path 2:
  - Customer reports issue or request directly to designated program manager. Program manager creates ticket within Touchstone CS system. Tickets are classified by priority level and type. Priority levels include:
    - Low, Medium, High, Emergency/Urgent
  - Tickets are routed to the following designated Touchstone reviewer depending on the level of priority
    - Customer Program Manager, Help Center Admin, Director of Software Development, etc.
  - The designated contact representative provides feedback to the submitter within the defined amount of time detailed within the Service Level Agreement
  - Tickets, corrective actions, and status are tracked within the customer accessible ticketing system until resolved

Service Level Agreement Details

The following details the various service levels and response times for correcting software issues or bugs. This does not include software enhancement requests, which will follow an enhancement scoping and implementation process.

Priority	Response Hours	Time to Initial	Resolution Time
Low	MST Business hours	1 business day	3 business days
Medium	MST Business hours (best effort during off hours)	4 hours during business hours	1 business day
High	24*365	1 hour, 24x365	4 hours, 24x365
Emergency/Urgent	24*365	15 minutes or less, 24x365	As soon as possible (not to

Response Hours refers to the time of day that Touchstone will provide a response to the problem. Business Hours refers to the period of 8AM to 5PM (Mountain Standard Time) Monday through Friday.

Time to Initial Contact refers to the amount of elapsed time after a problem has been logged with Touchstone CS to before contact is made with the City to review and obtain further details of the issue or request.

Target Resolution Time refers to objective for the maximum elapsed time after the problem is logged for Touchstone to provide some sort of problem resolution. Problem resolution can be a response indicating the steps being taken to remediate the problem with an estimated time frame.

Note: A system defect is defined as an issue (commonly known as a “bug”) with the Touchstone CS system requires a change to the underlying programming code and a new version of the solution to be deployed.

Issues that are not related to a system defect are issues that can be resolved through system configuration changes that do not require a change to the underlying programming code. System configuration changes can generally be made in very short timeframes and generally require no system downtime. When a system defect is identified and corrected, the new deployment activity falls into one of the three general groupings:

- Scheduled Release – Normal Cycle
- Scheduled Patch Release
  Emergency Patch Release (unscheduled software update to fix a newly identified software bug)

Touchstone will provide status updates on a reported issue based on a mutually agreed upon interval until such time the problem is resolved. Communication frequency (in terms of updates provided from Touchstone to CCD during an incident) shall be determined on a case-by-case basis. The City and County of Denver and Touchstone will mutually agree upon frequency of update and Touchstone shall adhere to such an agreement.

Service Levels will be determined in accordance with the following guidelines:
Emergency
- System down during solution using agency/agencies operating hours

High
- Program errors without workarounds
- Incorrect calculation errors impacting records
- Performance issues of severe nature impacting day to day business processes
- Security breaches and other security issues
- Any impact to revenue generating system components/integrations

Medium
- System errors that have workarounds
- Performance issues not impacting day to day business processes
- Usability issues

Low
- Report formatting
- Aesthetic issues
- Recommendations for enhancements on system changes

Touchstone will make every effort to provide a problem resolution within the stated Service Resolution time goal.

Contingencies and Non-Compliance Penalties

System Functionality Contingencies

Touchstone Benchmarking is committed to providing the following functionalities that are currently not available within the current Touchstone SaaS. These functionalities will be provided within the current scope of work and budget.

1) Email inbox integration
2) Enhanced custom report builder

Both functions are included within our current development pipeline and will be available to Demo Oct. 1st. In the event these functionalities are not available by Oct 1st and/or they do not meet the needs of the City as listed in the RTM, the City reserves the right to continue to utilize the current Salesforce design. In the event the additional functionalities are not available in Touchstone CS by Oct. 1st, the City will go out to RFP for the Task III: Supporting Systems portion of this project.

Non-Compliance Penalties

Touchstone IQ proposes the following quality assurance non-compliance penalties should the software not meet the service levels detailed within the quality assurance plan.

1) Touchstone IQ will rectify any quality assurance or performance related issue as detailed within the Quality Assurance Plan within the designated time frame at no additional cost to the City.
2) In the event Touchstone IQ does not meet the defined service levels or enables reoccurring quality issues, the SaaS fee for the affected time period will be waived.
    a. Waived fees will be prorated based on number of days of non-compliance (The days the system is not available or incorrectly functioning).
    b. The waived fee will be calculated based on the percent of days per year of non-compliance multiplied by the annual Touchstone Benchmarking City and State SaaS licensing fee (currently $30,580 per year).

Separation of Services

As of the date of execution of the Fourth Amendatory Agreement, City contract number CASR-202475978-03, the Vendor shall not directly solicit or entice, in any manner, any building owner in the City and County of Denver that is covered by the Energize Denver performance requirements (D.R.M.C § 10-403, 10-404, or 10-405), for the purpose of offering or providing energy management services that are duplicative or additive of those described in the scope of work herein. The Vendor may provide services to building owners within the City of Denver who are existing clients of the Vendor as of the date of execution of the Fourth Amendatory Agreement, so long as the services provided are not duplicative of those described by the scope of work herein. This prohibition shall remain in effect for the duration of this Agreement.

Project Team

The following details our proposal staff organization and key members that will lead and support the delivery of the program. Various members may be added or removed as the program evolves.

LEAD AND SUPPORT STAFF

Organization	Team Member	Title	Role
Touchstone IQ	Jon Dierking	CEO	Executive Sponsor
	Cat Burge	CFO	Principal
	Jamie Westhoven	Director, Energy & Sustainability Programs	Program Director / Engagement Coordinator
	Matt Klahn	Director of Operations / Engineering	Program Director
	Zack Hart	Associate Director, Energy & Sustainability Programs	Program Director
	Jessica Brown	Program Manager II	Program Manager
	Ellie Hanson	Program Manager I	Program Manager
	Kelsey Thomas	Program Manager I	Project Manager, Help Center Support
	Kasha Malling	Program Manager I	Help Center Support
	Saif Ur Rehman	Project Manager I	EPB Support
	Peter Wharton	Energy & Sustainability Consultant II	Help Center Support
	Gage Schneider	Energy & Sustainability Consultant II	Help Center Support
	Ivan Nunes	Energy & Sustainability Consultant I	Help Center Support
	Andrew Carlson	Director of Web and Database Development	Software Implementation Lead
	Scott Perlitch	Lead Developer	Software Implementation
	Josh Graham	Lead Developer	Web Developer
	Robbie Antenesse	Front End Developer	Web Developer
	Rob Harris	Web & Database Developer	Web Developer
IMT	Marla Thalheimer	Senior Director, Business Engagement	Business Engagement & Outreach
	Ella Wetlesen	Program Associate, Business Engagement	Material Development

	Theresa Backhus	Director of Building Innovation Hub	Hub Administration & Operation
	Alexandra Laney	Senior Communications Manager	Communications
	Lotte Schlegel	Executive Director	Policy Development & Implementation
	Mike Towler	Manager of Finance & Strategy	General Administration
	Kathryn Weeks	Managing Director of Communications & Development	Communications
BE-Ex	Richard Yancy	Executive Director	Hub Administration & Operation
	Helen Chananie	Manager of Projects	Material & Educational Development
	Katie Schwamb	Manager of Programs	Material & Educational Development
Group14	Celeste Cizik	Principal & Existing Buildings Team Leader	Principal in Charge & Quality Control
	Laura Dyas	Senior Energy Project Manager	Project Manager
	Taylor Roberts	Building Performance Engineer	Energy Engineer / Codes & Modeling
	Sade Oduyume	Building Performance Engineer	Energy Engineer
	Michael Levinson	Principal & Affordable Housing Team Leader	Affordable Housing & Non-Profit Principal
	Tom Flanagan	Energy Engineer	Energy Engineer
	Nicole Ilderton	Building Performance Engineer	Affordable Housing & Non-Profit Consultant

TOUCHSTONE IQ TITLES AND RATES

Title	**Rate**			
	Y2	Y3	Y4	Y5
Principal	$202.00	$210.00	$218.00	$227.00
Director of Operations	$202.00	$210.00	$218.00	$227.00
Director, Energy & Sustainability Programs	$177.00	$184.00	$192.00	$192.00
Director, Engineering	$165.00	$171.60	$178.46	$185.60
Engineer II	$150.00	$156.00	$162.24	$168.73
Engineer I	$140.00	$145.60	$151.42	$157.48
Associate Director, Energy & Sustainability Programs	$165.00	$171.60	$178.46	$185.60
Program Manager III	$150.00	$156.00	$162.24	$168.73
Program Manager II	$145.00	$151.00	$157.00	$163.00
Program Manager I	$140.00	$145.60	$151.42	$157.48
Project Manager II	$140.00	$145.60	$151.42	$157.48
Project Manager I	$135.00	$140.40	$146.02	$151.86
Energy & Sustainability Consultant II	$80.00	$83.20	$86.53	$89.99
Energy & Sustainability Consultant I	$62.00	$64.00	$67.00	$70.00
Director of Web and Database Development	$150.00	$156.00	$162.24	$168.73
Lead Developer	$145.00	$150.80	$156.83	$163.11
Front End Developer	$140.00	$145.60	$151.42	$157.48
Web & Database Developer	$130.00	$135.00	$140.00	$146.00

Project Management

During onboarding there will be at a minimum a weekly check in with the City to communicate progress and next steps. Frequency of check ins will be adjusted to meet programming and project needs.

Touchstone IQ will dedicate a program manager that will communicate directly with the City and be the main point of contact for the City. All City interactions will be directly with the program manager with information conveyed to the individual task leads (i.e., benchmarking, HUB, Software solution, equity priority buildings program). Weekly check-ins will include an update on program status and will include progress reports detailing completed tasks and scheduled items for the following week and months.

Regularly scheduled check in meetings will be established for the individual sub-program tasks as well (i.e., benchmarking, HUB, Software solution). Touchstone IQ Task Team leads will meet with the assigned Denver staff member to review project progress and actions for these targeted sub-programs. Frequency of check ins will be adjusted to meet programming and project needs. Help Center employees and other team members will be brought into the meetings as needed.

Touchstone IQ will establish a flow of communications with the City to ensure that the City is informed when there is a problem and the plan to resolve the issue with an estimated timeline of completion.

The contractor will develop a Project Plan prior to work start that describes the approach, techniques, timelines, and technologies that will be utilized.

ATTACHMENT 1: DBID Profile Data Fields

Building Detail
Property Name
Denver Building ID(DBID)
CoStar Property Id
Compliance Status
Parent Property
GIS SQ Ft
COstar Sq Ft
Invalid Building Id
Compliance Notification Sent
Primary Address
Costar Submarket
Costar Building Class
Assessor Sector
Flag Bypass
Government Type
Engineering Review Required
Engineering Review on File
Asked for EE information
Pending resubmittal Counter
Pending Resubmittal End date
Xcel Issues?
Portfolio Manager ID
Parent Property ID
Parent Property Name
Year Built
Parcel
Assessor Sq Ft
Corrected Sq Foot Area
Master Sq Ft
Sq Ft Discrepancy Flag
Single Building Per Parcel
Energy Flag
Portfolio Manager Alerts
Use Type Flags
Year over Year Flag
Activity This Year
All Days in Progress Counter
All Days in Progress Start Date
All Days in Progress End Date
Property Details
Property : Primary Property Type - Self Selected
Property Data Administrator
Service and Product Provider

Property GFA-Self Reported (sq ft)
occupancy
Primary Property Type - EPA Calculated
Property Data Administrator - Email
Property GFA - EPA Calculated (sqft)
number of buildings

Property Use

Property GFA - EPA Calculated Buildings
Largest Property Use Type- Pick
2nd largest property Use type-pick
3rd largest property use type- pick
metered areas (energy)
property GFA - EPA Calculated (parking)
largest property use type - sq ft
2nd largest property use type - sq ft
3rd largest property use type- sq ft

Property Notes

Property notes
neighborhood
council district

Year over Year comparison

Year over Year comparison: Year over Year Gas
Year over Year Electric
Year over Year ENERGY STAR
Year over Year EUI

Submission Info

On behalf of
phone
email
last modified by
organization
generation date
release date

Energy

ENERGY STAR Score
Green Power - Onsite (kWh)
Electricity Use - Grid Purchase (kWh)
Site Energy use (kBtu)
Source Energy Use (kBtu)
National Median Site Energy Use (kBtu)
National Median Source Energy Use (kBtu)
Weather Normalized Site Energy Use (kBtu)
Weather Normalized Source Energy Use (kBtu)
District Chilled Water Use (kBtu)
Natural Gas Use (kBtu)
Pct Difference from national Median EUI
Total GHG emissions (metric tons co2e)

Denver Building ID
Conincidental Grid and Renewable Onsite
Electricity use Grid Purchase and Onsite
Green Power of total electricity grid
Energy star Eligibility
metered areas
reason(s) for no score
ENERGY STAR certification year(s) cert
recent ENERGY STAR certification
green power-offsite(kWh)
electricity use onsite renewable(kWh)
Site EUI (kBtu/sq ft)
Source EUI (kBtu/sq ft)
National Median Site EUI (kBtu/sq ft)
National Median Source EUI (kBtu/sq ft)
Weather Normalized Site EUI (kBtu/sq ft)
Weather Normalized Source EUI
District Steam Use (kBtu)
Pct Electricity from Green Sources
Reported for year
EUI value flag
energy use sq ft flag
natural gas units
no gas flag
energy star score flag
energystar score value flag
weather normalized flag
no electric flag
last modified by
created by

Portfolio Manager Alerts

Property has no uses
meter has less than 12 full months
meter has gaps
meter has overlaps
data center does not have an IT meter
individual monthly meter entry days
meters associated with property
gross floor area is 0 sq ft
Denver building ID

Building Contacts

Contact type
first name
last name
email
phone
contact source

Addresses
Do not mail
address type
address source
street
city
state
zipcode
bounceback
address name
standardized address
Exemption
DBID
first name
last name
email
phone
company
building address
relationship to building
detailed explanation
status
exemption reason
relationship notes
Citations
Citations Name
DBID
Issued
Paid
Citation Status
Building Use Information
Reported Year
Financial Office Weekly Hours
Financial Office Number of Workers
Financial Office Number of Computers
Financial Office pct Cooled
Financial Office pct Heated
Office Weekly operating hours
Office Workers on Main Shift
Office Number of Computers
Office pct cooled
Office pct heated
Hotel Number of Workers
Hotel Cooking Facilities
Hotel Fridge/Freezer Units
Hotel Number of Rooms
Hotel pct Cooled

Hotel pct Heated
Medical Office Weekly Operating Hours
Medical Office Workers on main shift
Medical Office pct cooled
Medical Office pct heated
Multifamily Number of Bedrooms
Multifamily Number of Units
Multifamily low rise units
Multifamily mid rise units
Multifamily high rise units
Submissions
*Copy of original energy report submission
Notes & Attachments
*Ability to save generic notes
*Ability to save attachments
Activity History
*ability to log a call
*ability to log an email
Building History
*autogeneration of saved compliance status history

ID	Requirement Type	Requirement Name	Requirement Description	Requirement Compliance	Vendor Response Comments
1	**Functional**	**Use Case Name, User Story, Standard Requirement Name, etc.**	**Description of the business need**		
1.1	Functional	Building owner case	Building Owners need the ability to submit exemption forms, energy reports, and contact the Help Center by phone and email. Building owners can be responsible for multiple DBIDs. The Denver Building ID(DBID) is a number assigned to all buildings in solution and is the primary identifier for buildings instead of mailing address, building address etc. When a building owner submits a energy report, exemption, or contacts the Help Center, a ticket should be created with the building owner and DBID# associated with it.	**Out-of-the-Box**	Covered Building Import The Touchstone CS platform will provide a built-in CSV and XLS file uploader with field level mapping into the relational database, enabling fast and easy import of data associated with covered buildings. As part of the upload function the platform will identify any existing and new data and updates each building record accordingly. The platform also includes GIS mapping and editing capabilities for tracking building footprints. This data can be utilized to generate Department of Energy Unique Building ID's (UBID). Covered Buildings List Maintenance Touchstone CS will provide both mass upload of an Excel based covered buildings list and manual entry of individual building data. The unlimited, relational database will store all building and contact information, link all data to the Denver building ID, and provide for expansion of the program over time, Standard building data fields include but are not limited to: • Building address • Owner contact information including address • Building type • Gross square footage • Latitude and longitude • X and Y coordinates Custom building data fields will be added to store additional data. Pre-built API integrations will provide fast and easy connections with legacy City department data and systems, where available (i.e. violation/fines, permitting, finance).
1.1.1	Functional	DBID profile	As a Help Center and city staff employee, I need the ability to create a profile in the solution with all of a building's demographics so that all historical energy, characteristic, ownership, communications etc. can be stored on the building level and in one place.	**Out-of-the-Box**	Collecting Annual Benchmarking Reports The Touchstone CS platform provides automatic integration with Portfolio Manager reporting with: • Automatic nightly download of new building data request report submissions • Portfolio Manager Web-services integration • Year-over-year tracking of all Portfolio Manager report data, maintaining historic data • Updating existing records and importing new records preventing duplication The platform also allows for real-time integration with portfolio Manager through their Web Services applications. This API connection allows for increased data collection functionalities from Portfolio Manager. The platform tracks all past and current building contact information including, but not limited to: • Building owner • Management company • Portfolio Manager consultant • Condo association • Designated representative The platform has the ability to track hundreds of data fields including all past and current building data. This includes data fields such as, but not limited to: • Address • Square footage • Building ID • Parcel number
1.1.2	Functional	View a DBID's Profile	As a Help Center and City staff employee, I need the ability to view a DBID's profile to be able to see all historical communications, energy reports, notes, and documents associated with the building.	**Out-of-the-Box**	Program Dashboard Overlay will work with the City to develop dashboard(s) to display information needed to support programming as outlined in the RTM. Touchstone CS will provide an online customizable dashboard that tracks building reporting in real-time and enables users to quickly understand status using a variety of measures including but not limited to: • Overall compliance rate • Compliance with performance standards • Average Energy Star Score overall or by building type • Average EUI • Emission performance • Exemption request averages and types The platform also provides real-time monitoring of: • Energy use • Emission metrics • Percent approved, in-progress, denied, and exempt • Error flags Tracking Customer Interactions Touchstone CS provides complete customer communication tracking and reporting capabilities: • History tracking of all communications and edits made to building records • Robust help desk reporting o Provides robust reporting functionality on all aspects of the collected data o Provides a variety of standard help desk reports including but not limited to: ⍰ Mailing lists
1.1.3	Functional	Building Owner Portal	As a Building Owner, I need the ability to log in to a solution and see detailed information about my property. Including compliance status, energy use trend over time, energy efficiency upgrades specific to my property etc.	**Out-of-the-Box**	Comprehensive Building Owner Portal Overlay's Touchstone Benchmarking for Building Owners (Touchstone BO) module will provide all the required (and key additional) Building Owner Portal functionality as outlined in the RTM. Including but not limited to: • ESPM step by step benchmarking guidance • Automated utility tracking • Compliance status • Exemption / extension status • Energy use stats • Energy use trends over time • Virtual energy audit • Performance dashboard o Goal setting and forecasting o Project status o Predicted and actual energy savings o Predicted and actual ROI • Information on incentives, financing, and implementation contractors
1.2	Functional	Exemption form	As a Building Owner, I need the ability to go online and submit an exemption form using their DBID# so that the exemption is automatically sent to solution and the Help Center for processing.	**Out-of-the-Box**	Customer Self-Service The platform provides multiple pre-built and custom forms used for data collection as well as the distribution of data. Forms utilized for building data collection include: • Claim my building (building owner contact collection) • Exemption request online form • Extension request online form • Performance standard data collection forms (i.e. energy audit, results, third party verification forms, et)

ID	Requirement Type	Requirement Name	Requirement Description	Requirement Compliance	Vendor Response Comments
1.3	Functional	Email with DBID #	As a Building Owner, I need the ability to receive an automatic email confirming the receipt of my exemption with my DBID# and building address for future reference.	**Out-of-the-Box**	Customer Self-Service The platform provides multiple pre-built and custom forms used for data collection as well as the distribution of data. Forms utilized for building data collection include: • Claim my building (building owner contact collection) • Exemption request online form • Extension request online form • Performance standard data collection forms (i.e. energy audit, results, third party verification forms, et) Building Owners receive an automated email verifying the system has received their online form request. Upon approval or deniel the building owner also received an email detailing the results of their request
1.4	Functional	Dashboard	The solution should have the ability to show multiple dashboards that track compliance, program, and Help Center metrics. The dashboards should be easily customizable and allow for tracking and monitoring of a variety of metrics. All data in dashboards should be easily exportable.	**With Configuration**	Setting up individual dashboard by user is performed during the setup process. This does not require any custom code and city staff can be taught to create their own dashboards.
1.4.1	Functional	Dashboard - Help Center Staff	As an Employee, I want the ability to view a Dashboard which shows all tickets separating the assigned versus unassigned and my open assigned tickets.	**Out-of-the-Box**	The Touchstone City and State Module is an "out-of-the-box" system that meets the requested system functions with no need for custom coding.
1.4.2	Functional	Dashboard - Program Metrics	As a Help Center and City staff employee, I need a dashboard to track program metrics of success, including: compliance metrics, number of calls an emails etc. ・ Track number of inquiries (phone, email, and if incorporated general inquiry forms) coming in over time. Show trend line of how inquiries fluctuate week to week or month to month. Be able to break these metrics down by different groups (building size, building type, and other distinguishing data fields). ・Show overall compliance metrics. For benchmarking this includes in compliance, in progress, pending resubmittal, not submitted, citation issued, citation paid statuses. Building Performance Policy metrics will need to be incorporated after the final policy has been developed. Examples of potential metrics include which buildings are in compliance, which are and aren't on track, overall progress of buildings portfolio's progress towards meeting compliance standards. (Should also be able to see this information on the building level) ・Show time trend of compliance with biweekly or Monthly check points that shows how compliance changes over time, i.e. graph out compliance on March 1st, March 14th, March 30th, April 7th etc. Be able to show multiple years' time trend against each other i.e. line graph with different lines for each year and monthly or biweekly data points. This should be shown for Benchmarking and BPS compliance metrics, most likely BPS compliance metrics will not need to be seen at the biweekly level, monthly should suffice. ・Metrics on compliance trends should be able to be narrowed down to how many buildings submitted on x day, how many came into compliance on x day, how many were one time submittals, how many needed resubmittals and how much time did it take for a building to come into compliance after their first submittal. Purpose is to have the ability to take a deeper dive into the program and evaluate how we are doing and how building owners are doing.	**With Configuration**	Dashboards and Reporting Program Dashboard Overlay will work with the City to develop dashboard(s) to display information needed to support programming as outlined in the RTM. Touchstone CS will provide an online customizable dashboard that tracks building reporting in real-time and enables users to quickly understand status using a variety of measures including but not limited to: • Overall compliance rate • Compliance with performance standards • Average Energy Star Score overall or by building type • Average EUI • Emission performance • Exemption request averages and types The platform also provides real-time monitoring of: • Energy use • Emission metrics • Percent approved, in-progress, denied, and exempt • Error flags Reporting Touchstone CS includes a reporting tool that enables fast, accurate reporting on all aspects of the collected data and features. The system comes with standard reports as well as the ability to create and save custom reports. There are no limitations on the type and data included within the report. Report examples include: • Compliance reports
1.4.3	Functional	Dashboard - Goal Metrics	As a City staff employee, I need a dashboard to track and measure the progress of the building portfolio so that I can measure if we are on track for our climate goals. I.e. Show progress of all buildings in portfolio towards meeting goals of energy efficiency reduction, heating emission reductions, ES scores and Average EUIs by building type. Show data points for current year and their progress over time. Be able to narrow down this information by neighborhood and council district.	**With Configuration**	Dashboards and Reporting Program Dashboard Overlay will work with the City to develop dashboard(s) to display information needed to support programming as outlined in the RTM. Touchstone CS will provide an online customizable dashboard that tracks building reporting in real-time and enables users to quickly understand status using a variety of measures including but not limited to: • Overall compliance rate • Compliance with performance standards • Average Energy Star Score overall or by building type • Average EUI • Emission performance • Exemption request averages and types The platform also provides real-time monitoring of: • Energy use • Emission metrics • Percent approved, in-progress, denied, and exempt • Error flags Reporting Touchstone CS includes a reporting tool that enables fast, accurate reporting on all aspects of the collected data and features. The system comes with standard reports as well as the ability to create and save custom reports. There are no limitations on the type and data included within the report. Report examples include: • Compliance reports
1.5	Functional	Change status of workflow of a Ticket	As a Help Center employee, I need the ability to change the status of a ticket in the solution to one of the 3 status so that the Help Center knows where the ticket is in the workflow. 3 status: Unassigned In progress Complete	**Out-of-the-Box**	Customer Service Tickets Touchstone CS provides a customer service ticket process that automatically creates a service ticket, enables manual assignment of each ticket to an agent, provides best practice processes for ticket management, and automatically closes tickets upon completion of the process. Automatic ticket creation includes but is not limited to: • General building owner inquiries o Phone o Email • Exemption and extension requests • QA/QC flagged ESPM report submissions Staff can define and change ticket status based that includes the requested ticket status. Standard reports track ticket status for the different business processes, enabling fast and accurate insights on help desk volume, compliance, and customer satisfaction.
1.6	Functional	Change status for a DBID#	As a Help Center employee, I need the ability to change the status of a DBID# so that I know what phase of compliance the building is in. There are 6 DBID statuses: exempt, in compliance, in progress, not submitted, pending resubmittal, citation issued, citation paid, lien filed.	**Out-of-the-Box**	Submission Processing Submission processing is a user editable setup feature allowing for easy designation of which PM report to download nightly, and the process flow for automated compliance status changes (i.e. In-Compliance, Pending Resubmittal, Missing Building ID, Not Submitted, etc.). Exemption, Extension and Claim My Building These processes utilize online forms for real-time data collection with automated status changes, creation of tickets for user review, and closing of tickets upon approval/denial. Workflows for sending tickets to specific users when these processes are initiated is also available.
1.7	Functional	Uploading documents	As a Help Center employee, I need the ability to log into the solution and attach or link electronic documents to a DBID profile so that the document(s) can easily be referenced in the future. (Associate it to a ticket if needed) i.e. scanned documents, .doc, .pdf, emails, pictures	**Out-of-the-Box**	Touchstone City & State module allows users to attached files to building records through multiple options including, notes section, tickets, emails, performance tracking, & fines/fees.
1.8	Functional	Downloading and viewing documents	As a Help Center employee, I need the ability to view and/or download any case document under a DBID profile.	**Out-of-the-Box**	Case documents uploaded to the system can also be downloaded within the Notes, ticket, fine/fee, exemption and email sections

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1.9	Functional	Saved Communication	As a Help Center employee, I need the ability to save any communication that occurs via phone call under ticket so that all communication is stored and can be referenced to in the future. (Need to be able to be logged as a "phone call")	**Out-of-the-Box**	Customer Service Tickets Touchstone CS provides a customer service ticket process that automatically creates a service ticket, enables manual assignment of each ticket to an agent, provides best practice processes for ticket management, and automatically closes tickets upon completion of the process. Automatic ticket creation includes but is not limited to: • General building owner inquiries o Phone o Email • Exemption and extension requests • QA/QC flagged ESPM report submissions Standard reports track ticket status for the different business processes, enabling fast and accurate insights on help desk volume, compliance, and customer satisfaction.
1.10	Functional	Emails	As a Help Center employee, I need the ability to send and receive emails directly from the solution so that there is not a need to use Outlook to communicate with the BO and all communication aka emails are saved in one location under the DBID#.	**Future Release**	Touchstone CS currently sends emails directly from the system emulating a city email address. Receiving emails with the abilty to asign to a ticket and DBID is scheduled for our next major release in September 2021. Email integration with the City's email system is required to provide this functionality. This requires both send and receiving security access from the City IT department. This functionality is configured during the setup process.
1.11	Functional	Scorecards	As a Help Center employee, I need the ability to send scorecards to every DBID that was in compliance for a given year. Scorecards show each DBIDs energy performance, potential cost savings for achieving energy savings, and compares buildings of similar type.	**Out-of-the-Box**	Insightful Building Scorecards The Touchstone CS platform automatically generates scorecards with building specific information and delivers them to individual building owners, improving customer satisfaction and driving energy efficiency adoption. These customized scorecards are automatically sent via email as a pdf attachment to owners upon closing of the annual benchmarking data set. The scorecard designs are easily built utilizing the built-in scorecard designer tool. This tool allows staff to build custom scorecards utilizing a large set of design template, charts, graphics, metrics and branding styles. The scorecard lay-out and the information included is determined by city staff in collaboration with the Overlay implementation team and fully branded for the City. Scorecard data inputs include but are not limited to: • Energy Star Score • EUI o How their building Energy Star Score and EUI compares to peers by ▯ Building type ▯ Size ▯ Neighborhood, etc. • Savings potential (high level cost and payback information) • Energy efficiency program support materials (rebates, incentive programs, PACE financing, etc.) Different scorecards can easily be developed for presenting information that is relevant to buildings of different size, type, and score utilizing the built-in score card
1.12	Functional	Energize Denver Map	As a Building Owner, I need the ability to at any point view energy performance data from other buildings and compare my energy performance to theirs.	**Out-of-the-Box**	Energize Denver Mapping Overlay will work with the City during implementation to determine whether the City will keep the current Energize Denver Map or migrate to the Touchstone CS map. The City reserves the right to keep the functionality of the existing Energize Denver Map. Real-Time Public Mapping The Touchstone CS platform provides an integrated, customized, web-based, and interactive public map presenting individual building performance metrics. The map design allows members of the public to view building compliance statistics, Energy Star rating, EUI, as well as compare buildings by metrics such as: • Size • Type • Location The platform displays year-over-year data to provide historical comparison ability with enhanced visuals, comparison functions, and reporting capabilities. The platform also features automatic, real-time updates as new building reports are submitted, reducing help desk call volumes and improving customer satisfaction. The Touchstone CS mapping tool is designed and updated on our staging site and only made public upon completing of internal testing and approval from the City. This staging site allows for updates to occur without impacting the live site.
1.13	Functional	Citations	As City Staff, I need the ability to export data on DBIDs and their citation numbers directly from the solution. In order to be able official City citations.	**Out-of-the-Box**	Reporting Touchstone CS includes a reporting tool that enables fast, accurate reporting on all aspects of the collected data and features. The system comes with standard reports as well as the ability to create and save custom reports. There are no limitations on the type and data included within the report. Report examples include: • Compliance reports • Building address & contacts • Standard building energy & emissions report • Exemption / extension reports • Mailing list reports • Ability to create custom reports All reports can be exported into Excel or csv.
2	**Non-Functional**	**Extensibility**	**Extensibility defines the capability for the solution to alter functionality generally without the need for recompiling and typically via mechanisms accessible to the customer/user.**		
2.1	Non-Functional	Workflow Management	Automation of processes executed manually in a business. It will provide an infrastructure to setup, execute, and monitor workflows.	**Out-of-the-Box**	Workflow Management Workflows are setup and managed within the Touchstone CS system to allow for user customization on a number of process flows within the system. Workflows are managed through five key areas 1) Portfolio Manager Submission Process Management 2) Quality Control Flags 3) Exemption, Extension, Claim My Building Processing 4) Ticketing Management 5) Email Communication Overlay will provide design and workflow management documentation as part of the software solution implementation and data migration. This will include a system diagram, process flow charts, and data flow diagrams.

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2.1.1	Non-Functional	Ticket Created	The solution shall have the ability to automatically create a ticket # that is attached to the DBID# .	**Out-of-the-Box**	Touchstone CS provides a customer service ticket process that automatically creates a service ticket, enables manual assignment of each ticket to an agent, provides best practice processes for ticket management, and automatically closes tickets upon completion of the process. Automatic ticket creation includes but is not limited to: • General building owner inquiries o Phone o Email • Exemption and extension requests • QA/QC flagged ESPM report submissions Standard reports track ticket status for the different business processes, enabling fast and accurate insights on help desk volume, compliance, and customer satisfaction.
2.1.2	Non-Functional	Exception log	The solution shall have the ability to automatically save an exemption form created in Formsite to a DBID#. (If Formsite is replaced by another solution it is important that the exemption form is saved and attached to a DBID# AND the solution does not require Business Owners to log into a system in order to fill in the exemption form.)	**Out-of-the-Box**	The platform provides multiple pre-built and custom forms used for data collection as well as the distribution of data. Forms utilized for building data collection include: • Claim my building (building owner contact collection) • Exemption request online form • Extension request online form • Performance standard data collection forms (i.e. energy audit, results, third party verification forms, et)
2.1.3	Non-Functional	Additional Forms (like exception)	The solution shall have the ability to add forms like the exemption form in the future, if needed. Ability to see all forms submitted for a DBID (i.e. exemption) within the DBID's profile.	**Out-of-the-Box**	The platform provides multiple pre-built and custom forms used for data collection as well as the distribution of data. Forms utilized for building data collection include: • Claim my building (building owner contact collection) • Exemption request online form • Extension request online form • Performance standard data collection forms (i.e. energy audit, results, third party verification forms, et)
2.1.4	Non-Functional	Assign a task	The solution shall have the ability to manually assign a ticket to a Help Center staff employee.	**Out-of-the-Box**	Touchstone CS provides a customer service ticket process that automatically creates a service ticket, enables manual assignment of each ticket to an agent, provides best practice processes for ticket management, and automatically closes tickets upon completion of the process. Automatic ticket creation includes but is not limited to: • General building owner inquiries o Phone o Email • Exemption and extension requests • QA/QC flagged ESPM report submissions Standard reports track ticket status for the different business processes, enabling fast and accurate insights on help desk volume, compliance, and customer satisfaction.
2.1.5	Non-Functional	Auto route based on ticket	The solution should have the ability to automatically route tickets based on ticket type or role. (i.e. If an exemption status is marked as "approved" then the ticket automatically closes.)	**Out-of-the-Box**	Touchstone CS provides a customer service ticket process that automatically creates a service ticket, enables manual assignment of each ticket to an agent, provides best practice processes for ticket management, and automatically closes tickets upon completion of the process. Automatic ticket creation includes but is not limited to: • General building owner inquiries o Phone o Email • Exemption and extension requests • QA/QC flagged ESPM report submissions Standard reports track ticket status for the different business processes, enabling fast and accurate insights on help desk volume, compliance, and customer satisfaction.
2.1.6	Non-Functional	Change status of Ticket workflow	The solution shall have the ability to select a workflow status from the following 3: "unassigned", "in progress", "complete"	**Out-of-the-Box**	Touchstone CS provides a customer service ticket process that automatically creates a service ticket, enables manual assignment of each ticket to an agent, provides best practice processes for ticket management, and automatically closes tickets upon completion of the process. Automatic ticket creation includes but is not limited to: • General building owner inquiries o Phone o Email • Exemption and extension requests • QA/QC flagged ESPM report submissions Standard reports track ticket status for the different business processes, enabling fast and accurate insights on help desk volume, compliance, and customer satisfaction.
2.1.7	Non-Functional	Change Status of DBID#	The solution shall have the ability to select a workflow status from the following 6: exempt, in compliance, in progress, not submitted, pending resubmittal, citation issued, citation paid, lien filed.	**Out-of-the-Box**	Program Dashboard Overlay will work with the City to develop dashboard(s) to display information needed to support programming as outlined in the RTM. Touchstone CS will provide an online customizable dashboard that tracks building reporting in real-time and enables users to quickly understand status using a variety of measures including but not limited to: • Overall compliance rate • Compliance with performance standards • Average Energy Star Score overall or by building type • Average EUI • Emission performance • Exemption request averages and types The platform also provides real-time monitoring of: • Energy use • Emission metrics • Percent approved, in-progress, denied, and exempt • Error flags Reporting Touchstone CS includes a reporting tool that enables fast, accurate reporting on all aspects of the collected data and features. The system comes with standard reports as well as the ability to create and save custom reports. There are no limitations on the type and data included within the report. Report examples include: • Compliance reports • Building address & contacts • Standard building energy & emissions report

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2.1.8	Non-Functional	Comments/Notes	The solution shall have the ability to make notations, comments, etc., during the workflow process and saved with a time stamp under a DBID#.	Out-of-the-Box	Tracking Customer Interactions Touchstone CS provides complete customer communication tracking and reporting capabilities: • Ability to create notes at a building level • History tracking of all communications and edits made to building records • Robust help desk reporting o Provides robust reporting functionality on all aspects of the collected data o Provides a variety of standard help desk reports including but not limited to: ▯ Mailing lists ▯ Building and contacts ▯ Call and email count o Ability to create custom reports with charts and graphics ▯ Ability to export specific data metrics in Xcel or csv
2.1.9	Non-Functional	Create/modify workflow	The solution shall provide the capability for an end-user to create/modify multi- key workflow processes with parallel branches. (For example, this would include the capability to modify the order of tickets, the firing of triggers based on events, alerts, the transmission of notifications via email, the updates to the status of tasks, etc.)	With Configuration	Work flows can be updated, but do require configuration. Work flows are setup during the implmeentation phase and can be regularly modify as needed.
2.1.10	Non-Functional	Escalation	The solution shall have the capability to automatically escalate to next person for review based on time limitations.	With Configuration	Ticket work flows can be updated, but do require configuration. Work flows are setup during the implmeentation phase and can be regularly modify as needed.
2.1.11	Non-Functional	Process flows	The Process Flows attached on a Visio document were designed to show the objective/idea of the future process. The solution does not have to be designed exactly. If there is a better solution, we would like to discuss. Can the solution meet all the features and capabilities illustrated in the Process Flows? If not, explain in notes.	Out-of-the-Box	Workflows are setup and managed within the Touchstone CS system to allow for user customization on a number of process flows within the system. Workflows are managed through five key areas 1) Portfolio Manager Submission Process Management 2) Quality Control Flags 3) Exemption, Extension, Claim My Building Processing 4) Ticketing Management 5) Email Communication Overlay will provide design and workflow management documentation as part of the software solution implementation and data migration. This will include a system diagram, process flow charts, and data flow diagrams.
2.1.12	Non-Functional	Timers	Ability to create conditions such as timers to a workflow process. I.e. Ability to track time spent by building owner fixing report errors. Ability to track time between DBID status change from "pending resubmittal" to "in compliance" and "in progress" to "in compliance". Ability to track time spent resolving ticket.	Out-of-the-Box	Workflows are setup and managed within the Touchstone CS system to allow for user customization on a number of process flows within the system. Workflows are managed through five key areas 1) Portfolio Manager Submission Process Management 2) Quality Control Flags 3) Exemption, Extension, Claim My Building Processing 4) Ticketing Management 5) Email Communication Overlay will provide design and workflow management documentation as part of the software solution implementation and data migration. This will include a system diagram, process flow charts, and data flow diagrams.
2.1.13	Non-Functional	Data Quality Triggers	The solution shall have the ability to create, customize and add/subtract data quality triggers within the Report Process (see workflow). If a data quality trigger is identified then a ticket will be created and the status will be marked as "unassigned" and the DBID# will be marked as "in progress". There are several Data Quality Checks in solution that will flag if a report is received with errors. The flags are separated into three categories: Building use type, Portfolio Manager, and Energy Flags. The Flags were generated to prevent common errors from going undetected on reports and ensuring the City, as well as the building owner, has accurate data. An outline of the flags by category is listed below, additional info on each flag can be found in the "Help Center Manual" attachment of the RFP.	Out-of-the-Box	The Touchstone CS platform automatically scans imported benchmark submissions for 50+ quality control errors beyond Portfolio Manager's checks and automatically sends email notifications in real-time to building owners with correction guidance, increasing data accuracy and compliance. This functionality completely removes the help center's manual review and correspondence time associated with quality control checking activities. The QC data checks include, but are not limited to: • EUI outside normal range • abnormal score • Non-matching sq-ft • Unrealistic # of workers • Unusual operating hours • No or missing utility data The platform also automatically creates customizable errors flags for help center staff review. Standard QC checks can easily be modified or turned off, and custom QC checks can easily be created and added to the automatic PM report scan process. QC checks can utilize a variety of logic including but not limited to: • Confirming valid data in specified fields • Confirming timing data • Confirming values fall within boundaries • Comparing values between time periods • Comparing values from different fields
2.2	Non-Functional	Uploading documents	The solution shall have the ability to upload documents and pictures (.doc, .pdf, .jpeg, etc.) files and save them under the DBID#.	Out-of-the-Box	Touchstone City & State module allows users to attached files to building records through multiple options including, notes section, tickets, emails, performance tracking, & fines/fees.
2.3	Non-Functional	Email	The solution shall have the ability to auto-generate or manually email the Building Owner at any point in the process. The emails should always be saved/record under the DBID# with a time stamp and the name of the person who sent the email.	Out-of-the-Box	The Touchstone CS platform provides a robust CRM toolkit that enables customer service best practices reducing help desk labor costs while improving customer satisfaction. The CRM toolkit enables functionality such as self-service, standardized email response templates, automatic notifications, and consistent owner outreach. CRM functionality includes but is not limited to:
2.3.1	Non-Functional	Email Templates	The solution shall have the ability to create and save different types of email templates in the system for reuse. Should have the ability to edit the template prior to sending.	Out-of-the-Box	The Touchstone CS system allow users to create, save and use email templates. Emails sent using these email template can be tracking and recorded by UBID
2.3.2	Non-Functional	Mass Email	The solution shall have the ability to send mass groups of emails to customizable groups of contacts and DBIDs. (i.e. I want to send 1 mass email to 10 Building Owners. Once the email is sent that 1 email will be saved under all 10 DBID#'s) (i.e.: only needing it send to buildings that are in compliance, or ability to make a customized group.)	Out-of-the-Box	The Touchstone CS platform includes and mass email communication and marketing campaign tool. This tools includes a built-in email template designer and mass email filter / pick list function • Mass outbound communications o Ability to generate mass and targeted emails for marketing, outreach, and educational purposes o Ability to customize who receives the email based on a host of filter types such as ▯ Compliance status, contact type, building type, size, government type, PM use type, extension status, etc. • Track email open, closed, clicked, bounced rates • Auto-generate and mass email building owner scorecards
2.3.3	Non-Functional	Email attachments	The solution shall have the ability to send emails with attachments within the system.	Out-of-the-Box	Touchstone CS can send emails with attachment on a single email or mass email function
2.4	Non-Functional	Common library	The solution shall have the ability to maintain common library of reusable objects, templates, workflows and code.	Out-of-the-Box	The Touchstone CS allows users to save templates for reuse related to email, QA/QC fields, and process flows
2.5	Non-Functional	Dashboard	The solution shall provide the ability to create and customize dashboards based on user profile settings.	With Configuration	Custom dashboards require configuration and will be setup based on user during the implementation process.

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2.6	Non-Functional	Monitor process	The solution shall have the ability to instantly check the status of any item to see where the bottlenecks are forming and get an estimated completion time.	Out-of-the-Box	Overlay will work with the City to develop dashboard(s) to display information needed to support programming as outlined in the RTM. Touchstone CS will provide an online customizable dashboard that tracks building reporting in real-time and enables users to quickly understand status using a variety of measures including but not limited to: • Overall compliance rate • Compliance with performance standards • Average Energy Star Score overall or by building type • Average EUI • Emission performance • Exemption request averages and types The platform also provides real-time monitoring of: • Energy use • Emission metrics • Percent approved, in-progress, denied, and exempt • Error flags
2.7	Non-Functional	Algorithm	The solution shall have the ability to auto calculate fees based on an algorithm if needed for a BPS. (This may be needed in the future: Calculate fees based on DBID square footage.)	With Configuration	The system does provide fee calculation, but custom fee calculations may require configuration depending on the complexity of the fee strucuture.
2.8	Non-Functional	Business Rules Management	The solution shall have the ability to support user-configurable business rules management features and capabilities. (Don't need to do live but will need the ability for someone to make changes.)	With Configuration	Workflows are setup and managed within the Touchstone CS system to allow for user customization on a number of process flows within the system. Workflows are managed through five key areas 1) Portfolio Manager Submission Process Management 2) Quality Control Flags 3) Exemption, Extension, Claim My Building Processing 4) Ticketing Management 5) Email Communication Overlay will provide design and workflow management documentation as part of the software solution implementation and data migration. This will include a system diagram, process flow charts, and data flow diagrams.
2.9	Non-Functional	Attributes	The solution shall have the ability to support user-configurable attributes that can be used in business rules, screens, and reporting. (Don't need to do live but will need the ability for someone to make changes.)	With Configuration	Workflows are setup and managed within the Touchstone CS system to allow for user customization on a number of process flows within the system. Workflows are managed through five key areas 1) Portfolio Manager Submission Process Management 2) Quality Control Flags 3) Exemption, Extension, Claim My Building Processing 4) Ticketing Management 5) Email Communication Overlay will provide design and workflow management documentation as part of the software solution implementation and data migration. This will include a system diagram, process flow charts, and data flow diagrams.
2.10	Non-Functional	Fields	They solution shall provide the ability to make fields editable, required, locked, read-only, and/or hidden.	Out-of-the-Box	The Touchstone CS system allows users to create custom fields and set permission around which users can assess specific areas via permissions
2.11	Non-Functional	Auto-populate fields	The solution shall provide the ability to auto-populate fields based on a rule.	With Configuration	The system can autopopulate fields based on custom rules. This setup does require configuration by the Touchstone CS team
2.12	Non-Functional	Personalized Correspondence	The solution shall provide the capability to customize and generate personalized customer correspondence with account information. (For example, this would include the capability to generate informational letters and create customized letters for reach-out campaigns.)	Out-of-the-Box	Email communications are also user defined. This includes editing existing and creating new email communication templates and designating each for various manual and automated processes. This includes designating email templates for automated processes such as, in-compliance, pending re-submittal, invalid ID, QC flags, exemption approved/denied, extension approved/denied, and scheduling mass email communications, among others.
2.13	Non-Functional	Reports	The City must have the ability to export all data collected in the solution to report on program success, progress towards meeting the City's energy goals, and to inform other areas of work for the City.	Out-of-the-Box	Touchstone CS includes a reporting tool that enables fast, accurate reporting on all aspects of the collected data and features. The system comes with standard reports as well as the ability to create and save custom reports. There are no limitations on the type and data included within the report. Report examples include: • Compliance reports • Building address & contacts • Standard building energy & emissions report • Exemption / extension reports • Mailing list reports • Ability to create custom reports All reports can be exported into Excel or csv.
2.13.1	Non-Functional	Auto-generate reports	The solution should have the ability to build and schedule reports on any of the data to automatically generate and be distributed via email on a daily, weekly, or monthly bases.	Out-of-the-Box	Touchstone CS includes a reporting tool that enables fast, accurate reporting on all aspects of the collected data and features. The system comes with standard reports as well as the ability to create and save custom reports. There are no limitations on the type and data included within the report. Report examples include: • Compliance reports • Building address & contacts • Standard building energy & emissions report • Exemption / extension reports • Mailing list reports • Ability to create custom reports All reports can be exported into Excel or csv.
2.13.2	Non-Functional	Filtering in reports/searches	The solution shall provide the ability to filter columns/rows on all data field collected in any search or report.	Out-of-the-Box	Touchstone CS includes a reporting tool that enables fast, accurate reporting on all aspects of the collected data and features. The system comes with standard reports as well as the ability to create and save custom reports. There are no limitations on the type and data included within the report. Report examples include: • Compliance reports • Building address & contacts • Standard building energy & emissions report • Exemption / extension reports • Mailing list reports • Ability to create custom reports All reports can be exported into Excel or csv.
2.13.3	Non-Functional	Reporting formats	The solution shall provide the ability to export reports in multiple formats including Excel, .PDF, Word, etc.	Out-of-the-Box	Touchstone CS includes a reporting tool that enables fast, accurate reporting on all aspects of the collected data and features. The system comes with standard reports as well as the ability to create and save custom reports. There are no limitations on the type and data included within the report. Report examples include: • Compliance reports • Building address & contacts • Standard building energy & emissions report • Exemption / extension reports • Mailing list reports • Ability to create custom reports All reports can be exported into Excel or csv.
2.13.4	Non-Functional	Standard and Ad-Hoc Reporting	Standard and Ad Hoc report writer which allows reporting and/or searches on any data field collected with the ability to customize reports by selecting which fields are needed.	With Configuration	The current report builder allows for filtering and customization by field types. Additional custom reports are available with configuration. An fully customizable report building is scheduled for release September, 2021.

ID	Requirement Type	Requirement Name	Requirement Description	Requirement Compliance	Vendor Response Comments
2.14	Non-Functional	DBID Profile	They solution shall allow users to create client-based cases that will include building demographics, communication (calls, emails), contacts, owners, etc..	Out-of-the-Box	Touchstone CS will provide both mass upload of an Excel based covered buildings list and manual entry of individual building data. The unlimited, relational database will store all building and contact information, link all data to the Denver building ID, and provide for expansion of the program over time, Standard building data fields include but are not limited to: • Building address • Owner contact information including address • Building type • Gross square footage • Latitude and longitude • X and Y coordinates Custom building data fields will be added to store additional data. Pre-built API integrations will provide fast and easy connections with legacy City department data and systems, where available (i.e. violation/fines, permitting, finance).
2.14.1	Non-Functional	Tickets linked to DBID Profile	The solution shall allow profiles to be able to have tickets associated that may be assigned to people.	Out-of-the-Box	Touchstone CS provides a customer service ticket process that automatically creates a service ticket, enables manual assignment of each ticket to an agent, provides best practice processes for ticket management, and automatically closes tickets upon completion of the process. Automatic ticket creation includes but is not limited to: • General building owner inquiries o Phone o Email • Exemption and extension requests • QA/QC flagged ESPM report submissions Standard reports track ticket status for the different business processes, enabling fast and accurate insights on help desk volume, compliance, and customer satisfaction.
2.14.2	Non-Functional	Contacts associated with multiple DBID Profiles	The solution shall allow to add and edit contacts under a DBID profile. Should be able to have multiple DBID profiles associated. Ratios: 1:1, 1:many Ability to have multiple building owners saved to each DBID profile. Ability to edit relationships between building owners and DBIDs.	Out-of-the-Box	Touchstone CS provides the ability for help desk agents to add or update building and contact information. The system can track multiple addresses for each building including property, owner, property manager, tax address, etc. This is also true for tracing contacts my unlimited types. Contact information is also update automatically directly from Portfolio Manager submission. Building owners also have the ability to update their contact information utilizing our online claim my building web form.
2.14.3	Non-Functional	Head of household	The solution shall have the ability to associate multiple contacts (families) with a head of household to a profile. Ability to organize contacts into customized lists and stakeholder groups.	Out-of-the-Box	Touchstone CS provides the ability for help desk agents to add or update building and contact information. The system can track multiple addresses for each building including property, owner, property manager, tax address, etc. This is also true for tracing contacts my unlimited types. Contact information is also update automatically directly from Portfolio Manager submission. Building owners also have the ability to update their contact information utilizing our online claim my building web form.
2.14.4	Non-Functional	Parent and Child DBID Profiles	The solution shall have the ability to associate multiple DBID profiles (campuses) with a parent property. (ability to have parent and child DBID profiles) i.e. when one DBID is used to submit for multiple DBIDs, all the DBIDs need to be associated with each other within the solution.	Out-of-the-Box	The Touchstone CS platform will group buildings into a portfolio using a variety of different criteria. Groups will be created using fully customizable tracking picklist fields. Typical groups include, but are not limited to: • Use type • Government type (city, federal, school, postal, etc.) • Geographic region The platform also features a parent-child building relationship structure that enables the individual tracking of multiple buildings on a parcel. This enables the reporting of multiple buildings to a single parent building ID.
2.14.5	Non-Functional	DBID Data Fields	The solution shall have the ability to accommodate and collect all current data fields and additional data fields in the DBID profile. i.e. ability to incorporate additional data fields from energy reports, ability to mark a building as invalid	Out-of-the-Box	The Touchstone CS platform provides automatic integration with Portfolio Manager reporting with: • Automatic nightly download of new building data request report submissions • Portfolio Manager Web-services integration • Year-over-year tracking of all Portfolio Manager report data, maintaining historic data • Updating existing records and importing new records preventing duplication The platform also allows for real-time integration with portfolio Manager through their Web Services applications. This API connection allows for increased data collection functionalities from Portfolio Manager. The platform tracks all past and current building contact information including, but not limited to: • Building owner • Management company • Portfolio Manager consultant • Condo association • Designated representative The platform has the ability to track hundreds of data fields including all past and current building data. This includes data fields such as, but not limited to: • Address • Square footage • Building ID • Parcel number • GIS coordinates
2.14.6	Non-Functional	Identify duplicates	The solution shall be able to flag duplicate DBID profiles and consolidate them. Help Center staff can review before system consolidates.	Out-of-the-Box	The system does not allow for the create of duplicate building ID's. For quality checks, reports can be run to verify no duplicate building ID's exist
2.15	Non-Functional	Equity Data Fields	The City will be developing an Equity Index that will be used to identify under resourced buildings in priority service areas. The solution must have the ability to incorporate equity metrics in DBID profiles. These fields should be able to be updated through an auto upload (automatically not manually). The solution must have an Equity Index data field, census tract data field, neighborhood data field, and a data field to indicate if a building is considered high priority. Ability to track which services a DBID is participating in through the future Buildings Resource hub. Additional Equity Fields may be desired at a later date.	Out-of-the-Box	Touchstone CS allows users to create custom field at the building level for tracking items such as a Equity Index
2.16	Non-Functional	BPS Data Fields	The solution must have the ability to track and calculate additional fields (such as targets, progress toward targets, other indicators, fine amounts) as necessary for the Building Performance Policy and interpret these fields into compliance statuses and notifications.	With Configuration	Due to the potential variations in the performance metrics and requirements we expect that this functionality will require configuration and performed during the software setup.

ID	Requirement Type	Requirement Name	Requirement Description	Requirement Compliance	Vendor Response Comments
2.17	Non-Functional	Scorecards	The solution must have the ability to autogenerate scorecards for all DBIDs that submit energy reports each year.	**Out-of-the-Box**	The Touchstone CS platform automatically generates scorecards with building specific information and delivers them to individual building owners, improving customer satisfaction and driving energy efficiency adoption. These customized scorecards are automatically sent via email as a pdf attachment to owners upon closing of the annual benchmarking data set. The scorecard designs are easily built utilizing the built-in scorecard designer tool. This tool allows staff to build custom scorecards utilizing a large set of design template, charts, graphics, metrics and branding styles. The scorecard lay-out and the information included is determined by city staff in collaboration with the Overlay implementation team and fully branded for the City. Scorecard data inputs include but are not limited to: • Energy Star Score • EUI o How their building Energy Star Score and EUI compares to peers by ▯ Building type ▯ Size ▯ Neighborhood, etc. • Savings potential (high level cost and payback information) • Energy efficiency program support materials (rebates, incentive programs, PACE financing, etc.) Different scorecards can easily be developed for presenting information that is relevant to buildings of different size, type, and score utilizing the built-in score card designer tool.
2.18	Non-Functional	Citations	The solution must have the ability to generate citation numbers for all DBIDs that are not in compliance after the deadline. The solution should also have the ability to auto update DBID statuses to "Citation Issued" when citation numbers are generated. The solution must store the citation number on each DBID profile.	**Out-of-the-Box**	The Touchstone CS system allows users to create citations at the building level and track citation status (initiated, paid, not-paid)
2.19	Non-Functional	Energize Denver Map	The solution must have a map that is integrated and displays energy information for all DBIDs. The map must be filterable by building size, ES score, EUI, building type etc.	**Out-of-the-Box**	The Touchstone CS platform provides an integrated, customized, web-based, and interactive public map presenting individual building performance metrics. The map design allows members of the public to view building compliance statistics, Energy Star rating, EUI, as well as compare buildings by metrics such as: • Size • Type • Location The platform displays year-over-year data to provide historical comparison ability with enhanced visuals, comparison functions, and reporting capabilities. The platform also features automatic, real-time updates as new building reports are submitted, reducing help desk call volumes and improving customer satisfaction. The Touchstone CS mapping tool is designed and updated on our staging site and only made public upon completing of internal testing and approval from the City. This staging site allows for updates to occur without impacting the live site.
2.19	Non-Functional	Open Source	A solution with code that can be provided on open source platforms are preferred but not required.	**Cannot Meet**	The Touchstone Benchmarking SaaS is a proprietary solution and cannot be provided open source to other entities.
2.19	Non-Functional	Quality Assurance	The solution shall have the ability to put in place and prioritize quality assurance in the data that is collected by the solution.	**Out-of-the-Box**	The Touchstone CS platform automatically scans imported benchmark submissions for 50+ quality control errors beyond Portfolio Manager's checks and automatically sends email notifications in real-time to building owners with correction guidance, increasing data accuracy and compliance. This functionality completely removes the help center's manual review and correspondence time associated with quality control checking activities. The QC data checks include, but are not limited to: • EUI outside normal range • abnormal score • Non-matching sq-ft • Unrealistic # of workers • Unusual operating hours • No or missing utility data The platform also automatically creates customizable errors flags for help center staff review. Standard QC checks can easily be modified or turned off, and custom QC checks can easily be created and added to the automatic PM report scan process. QC checks can utilize a variety of logic including but not limited to: • Confirming valid data in specified fields • Confirming timing data • Confirming values fall within boundaries • Comparing values between time periods • Comparing values from different fields
3	**Non-Functional**	**Security**	**Security is the capability of a solution to prevent malicious or accidental actions outside of the designed usage, and to prevent disclosure or loss of information. A secure solution aims to protect assets and prevent unauthorized modification of information.**		
3.1	Non-Functional	Role-Based Security	The solution shall have the ability to limit access to data, screens, and critical functions based on roles.	**Out-of-the-Box**	Overlay will setup user accounts for all City staff approved for access to the software platform. Overlay will work with the City's project manager to identify and configure the access and security level of each individual user. The City will have an unlimited number of users that can access the system. Users access is configurable to allow for various user permissions and access to specific areas.
3.2	Non-Functional	Identity Management	The solution shall have the ability to provision users, assign them into role/groups, and manage their access rights to specific areas of the solution.	**Out-of-the-Box**	Overlay will setup user accounts for all City staff approved for access to the software platform. Overlay will work with the City's project manager to identify and configure the access and security level of each individual user. The City will have an unlimited number of users that can access the system. Users access is configurable to allow for various user permissions and access to specific areas.
3.3	Non-Functional	Access Management	The solution shall have Access Management: This includes the features and capabilities to support Single Sign On (SSO), authentication, authorization, auditing, policy administration.	**With Configuration**	Touchstone provides both mutli-factor authentication and SSO access management. SSO does require configuration with the city IT department
3.4	Non-Functional	Auditing Trail	User activity must be recorded for security and auditing purposes. The solution shall have the ability to track changes made in the system such as who, what, and when the change was made.	**Out-of-the-Box**	Within the Touchsotne CS system, changes are tracked down to the building level. Users can view all changes to a building record and communications made directly within the system.
4	**Non-Functional**	**Privacy/Data Protection**	**Privacy and data protection relates to how PII is used throughout the information lifecycle (creating, accessing, using, modifying, storing, and archiving/destroying). Privacy and data protection standards require the implementation of physical, technical and administrative safeguards to protect data throughout the information lifecycle. Compliance to standards, regulations (state and federal), and best practices must be validated and verified.**		

ID	Requirement Type	Requirement Name	Requirement Description	Requirement Compliance	Vendor Response Comments
4.1	Non-Functional	Personal Identifiable Information (PII)	NIST Special Publication 800-122 defines PII as "any information about an individual maintained by an agency, including (1) any information that can be used to distinguish or trace an individual's identity, such as name, social security number, date and place of birth, mother's maiden name, or biometric records; and (2) any other information that is linked or linkable to an individual, such as medical, educational, financial, and employment information."	Out-of-the-Box	We consider the data within Touchstone Benchmarking to be of low risk as all data is public via alternative sources. However we do implement industry standards for security all the same. Primarily we use a WAF (Web Application Firewall) to protect the servers/infrastructure. Additionally, server level firewalls and IP address restrictions are in place limiting direct server access to our office IP exclusively. We use WAF tools and AWS tools for monitoring and alerting. The SaaS application sits behind a WAF (Web Application Firewall) that recognizes access attempts including DDOS and other malicious actions and will react to block by IP those actions. Additionally, we can manually block at a low level any specific IP address, or by entire geo location such as by country and currently block several known bad actor regions.
4.2	Non-Functional	National Institute of Standards and Technology (NIST) SP 800-53R4	The solution complies with the National Institute of Standards and Technology (NIST) SP 800-53R4.	Out-of-the-Box	The Touchstone Benchmarking SaaS meets this requirement as detailed below. Touchstone Benchmarking has a primary goal of simplifying the aspects of collecting and managing benchmarking data. To that end account ACL or access control lists are intentionally simplified to Viewer, Collaborator, and Administrator. These are similar to Google Analytics ACL rules. There are no actions for non-authenticated users. Only Administrator users can adjust system settings, invite users, and "delete" data. Upon receiving an invitation a user must acknowledge terms and conditions pertaining to their account type. Unsuccessful attempts as well as all connections to Touchstone Benchmarking servers use throttling to prevent excessive access attempts. A WAF (Web Application Firewall) is also employed to automatically block IP addresses guilty of exceeding these attempts. Since Touchstone Benchmarking is considered a SaaS (Software as a Service) application, all access is via the web and would therefore be considered remote. Some content is considered public such as public facing map with energy consumption data. This data is available in real time and sanitized prior to access. A built in help system and training/user guide is provided. An audit log of building, contact, address, and energy consumption data is maintained within TouchstoneBenchmarking. All actions including automated or performed by users are recorded and visible at the building level by whom, what changed, from what to what, and when. Timestamps are stored in UTC. All data possesses it's own created, updated, and deleted timestamp as well. No data is deleted but only marked as deleted and 'hidden' from view. There is no ability to edit or delete audit information. What's visible on the page is limited in scope, but full records can be exported as needed. There is unlimited time and storage capabilities for event logging.
5	**Non-Functional**	**Availability**	**Availability defines the proportion of time that the solution is functional and working. It can be measured as a percentage of the total solution downtime over a predefined period. Availability will be affected by solution errors, infrastructure problems, malicious attacks, and solution load.**		
5.1	Non-Functional	Downtime	Ability to meet the SLA provided as one of the attachments. If not you are unable to meet, please provide your own detailed SLA following the example.	Out-of-the-Box	The Touchstone CS system meets the requested SLA. Priority Response Hours Time to Initial Contact Resolution Time Low MST Business hours 1 business day 3 business days Medium MST Business hours (best effort during off hours) 4 hours during business hours 1 business day High 24*365 1 hour, 24x365 4 hours, 24x365 Emergency/Urgent 24*365 15 minutes or less, 24x365 As soon as possible (not to exceed 4 hours), 24x365
5.2	Non-Functional	Uptime	Solution shall be functional and working 24 hours a day and 7 days a week.	Out-of-the-Box	The Touchstone CS system meets the requested SLA. Priority Response Hours Time to Initial Contact Resolution Time Low MST Business hours 1 business day 3 business days Medium MST Business hours (best effort during off hours) 4 hours during business hours 1 business day High 24*365 1 hour, 24x365 4 hours, 24x365 Emergency/Urgent 24*365 15 minutes or less, 24x365 As soon as possible (not to exceed 4 hours), 24x365
6	**Non-Functional**	**Interoperability**	**Interoperability is the capability of a solution or different solutions to operate successfully by communicating and exchanging information with other external solutions written and run by external parties. An interoperable solution makes it easier to exchange and reuse information internally as well as externally.**		
6.1	Non-Functional	Formsite	A one-way integration from Formsite to the solution in real time. Approximate average volume is 15 forms per day, with high volume days seeing 40 or more submissions (forms). (Form sent to solution and attached to a DBID#)	Out-of-the-Box	The platform provides multiple pre-built and custom forms, using FormSite, used for data collection as well as the distribution of data. Forms utilized for building data collection include: • Claim my building (building owner contact collection) • Exemption request online form • Extension request online form • Performance standard data collection forms (i.e. energy audit, results, third party verification forms, et)
6.2	Non-Functional	ESPM	Integration which data flows one-way from ESPM to the solution. This should be an automatic nightly download with the ability to manually kickoff the download. Approximate average volume is 40 Energy reports per day with maximum volume being greater than 200 per day. (Energy report sent to solution and attached to a DBID#)	Out-of-the-Box	The Touchstone CS platform provides automatic integration with Portfolio Manager reporting with: • Automatic nightly download of new building data request report submissions • Portfolio Manager Web-services integration • Year-over-year tracking of all Portfolio Manager report data, maintaining historic data • Updating existing records and importing new records preventing duplication The platform also allows for real-time integration with portfolio Manager through their Web Services applications. This API connection allows for increased data collection functionalities from Portfolio Manager. The platform tracks all past and current building contact information including, but not limited to: • Building owner • Management company • Portfolio Manager consultant • Condo association • Designated representative The platform has the ability to track hundreds of data fields including all past and current building data. This includes data fields such as, but not limited to: • Address • Square footage • Building ID • Parcel number • GIS coordinates

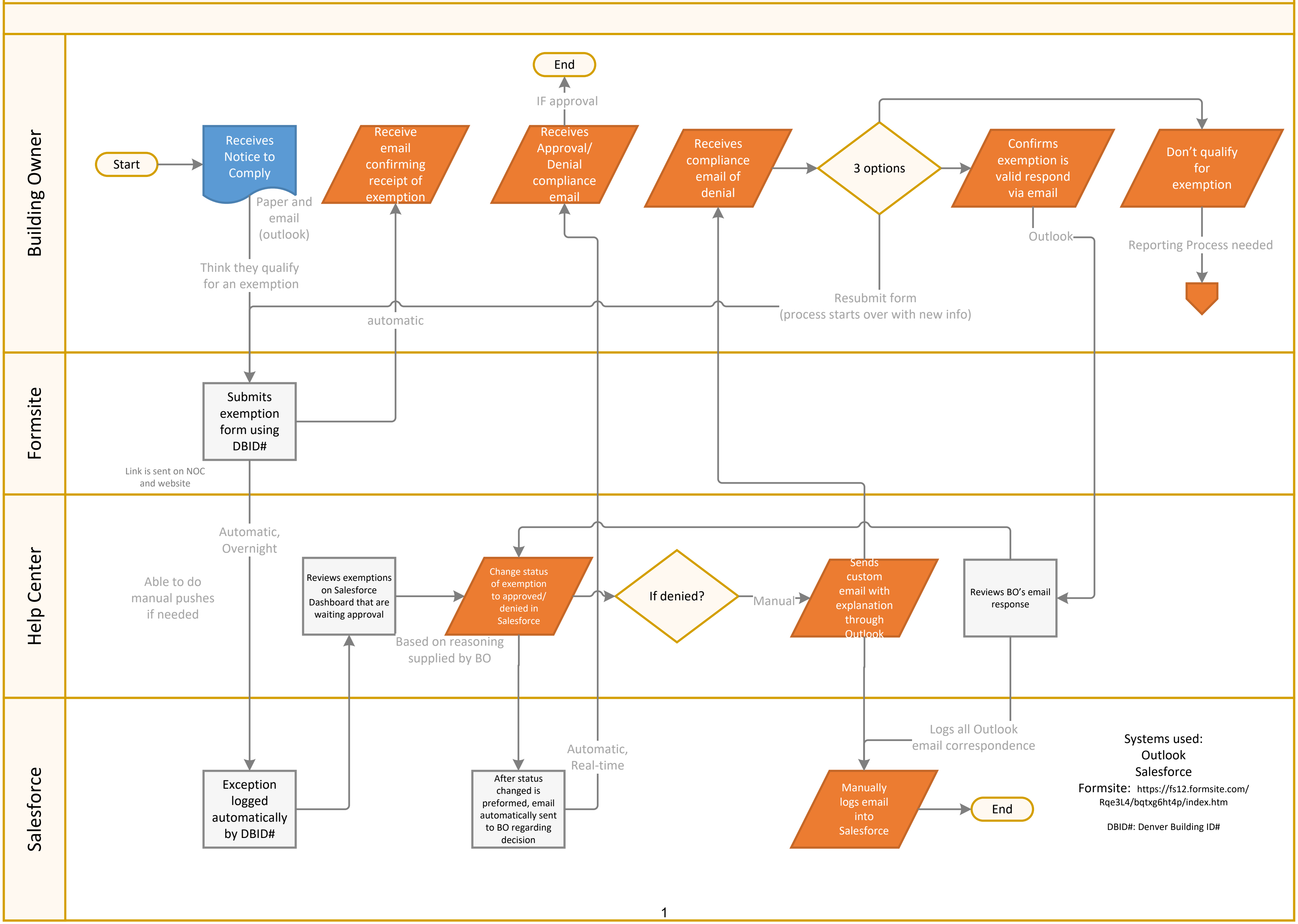
ID	Requirement Type	Requirement Name	Requirement Description	Requirement Compliance	Vendor Response Comments
6.3	Non-Functional	Energize Denver Map	Integration with data flowing from the solution to Energize Denver Map. This should be an automatic upload twice per year (June 1st, and ~August 15th). All DBIDs are updated at the same time on the map (>3000 buildings). (Data (about 8 data fields) under a DBID# sent from the solution to Energize Denver map)	Out-of-the-Box	The Touchstone CS platform provides an integrated, customized, web-based, and interactive public map presenting individual building performance metrics. The map design allows members of the public to view building compliance statistics, Energy Star rating, EUI, as well as compare buildings by metrics such as: • Size • Type • Location The platform displays year-over-year data to provide historical comparison ability with enhanced visuals, comparison functions, and reporting capabilities. The platform also features automatic, real-time updates as new building reports are submitted, reducing help desk call volumes and improving customer satisfaction. The Touchstone CS mapping tool is designed and updated on our staging site and only made public upon completing of internal testing and approval from the City. This staging site allows for updates to occur without impacting the live site.
6.4	Non-Functional	To be determined by the State	The solution must have the ability to integrate data with the State's system if the State passes a benchmarking policy, so that building owners can submit energy reports and exemptions to either the state or the City to be in compliance with both policies. Only data collected through ESPM for a given year would need to be integrated with the state, all DBID profiles in solution would need to be integrated (>3000 DBID profiles).	With Configuration	The system includes full API integration capabilities for importing/exporting of all data fields. Depending on the requested integration, some configuration and coordination with the outside entity to where data will be transfered is requered.
7	**Non-Functional**	**Manageability**	**Manageability defines how easy it is for solution administrators to manage the application, usually through sufficient and useful instrumentation exposed for use in monitoring solutions and for debugging and performance tuning.**		
7.1	Non-Functional	Test Environment	The solution must have a test environment for making adjustments prior to pushing through final updates. It is important that the Energize Denver Map and Building owner portal have test environments, the City will need to approve all updates before pushing out changes that the public will see.	Out-of-the-Box	A replica staging site is utilized for all Touchstone modules and is available for testing purposes prior to pushing updates to the production system. A demo of the stating "test" environment is available to view prior to contract signing.
8	**Non-Functional**	**Performance**	**Performance is an indication of the responsiveness of a solution to execute any action within a given time interval. It can be measured in terms of latency or throughput. Latency is the time taken to respond to any event. Throughput is the number of events that take place within a given amount of time.**		
8.1	Non-Functional	Response time	The solution shall have a response time of no longer than 2 seconds.	Out-of-the-Box	The system response time is tracked in the miliseconds and performance metrics can be provided upon request.
9	**Non-Functional**	**Scalability**	**Scalability is capability of a solution to either handle increases in load without impact on the performance of the solution, or the capability to be readily enlarged.**		
9.1	Non-Functional	Licenses	The solution shall accommodate a minimum of 2 licenses with the flexibility of +/- 1. This does not include the Help Center staff.	Out-of-the-Box	The Touchstone Benchmarking - City & State Module includes unlimited licenses for city and help center staff.
9.2	Non-Functional	Profiles	The solution shall accommodate minimum of 3500 DBID profiles with an increase of 2% per year. If a policy passes in early 2022, the solution must have the ability to accommodate 17,000 DBID profiles with an increase of 2% per year. (The City's current solution holds >3000 DBID profiles.)	Out-of-the-Box	The Touchstone Benchmarking - City & State Module utilizes a cloud-based expandable server design that increases capacity in real-time as-needed. This allows for an unlimited number of building profiles and data points
9.3	Non-Functional	Document Management	The solution shall accommodate a minimum of 28,000 documents per year with an increase of 10% per year. Avg document attachment for each DBID# is 8.	Out-of-the-Box	The Touchstone Benchmarking - City & State Module utilizes a cloud-based expandable server design that increases capacity in real-time as-needed. This allows for an unlimited number of building profiles and data points
10	**Non-Functional**	**Recoverability**	**Recoverability refers to the capability to restore your deployment to the point at which a failure occurred. The capability to recover quickly from a solution failure or disaster depends not only on having current backups of your data, but also on having a predefined plan for recovering that data on new hardware.**		
10.1	Non-Functional	Fail Safe	The solution shall have a fail safe which will prohibit the system from ever going down.	Out-of-the-Box	Touchstone uses Amazon Web Services (AWS) for infrastructure needs. AWS is a cloud computing system, a decentralized network of data centers. Servers within the data center use virtualization to provide containerized abstractions of physical hardware, which securely isolates instances from each other. We utilize a Web Application Firewall (WAF) to dynamically compile a list of unfavorable IPs and automatically block repeat offenders. AWS provides 99.9% uptime with no single point of failure throughout the network. While no software system can claim they will never go down, Touchstone Benchmarking utilizesa best-in-class solution to ensure a 99.9% uptime
11	**Non-Functional**	**Usability**	**Usability defines how well the application meets the requirements of the user and consumer by being intuitive, easy to localize and globalize, providing good access to users with a variety of skills, and resulting in a good overall user experience.**		
11.1	Non-Functional	Building Owner Portal	The solution shall have a Building Owner portal that can be modified to follow the look-and-feel standard of the City of Denver. The portal must be customizable and adjustable at City Staff employee discretion. The portal must allow building owners to log in and see key metrics for the DBID(s) they are responsible for. The City is open to discussion on what the portal should display, the following are potential metrics that could be displayed: •DBID(s) compliance status. •Display DBID(s) energy use and emissions trend over time. (potential to break out by steam, chilled water, natural gas, electricity, and renewables) •Display upgrade options for DBID(s) and what upgrades other DBIDs have selected •highlight which options have greater returns •identify potential easiest path to compliance for DBID(s) •display which upgrades have greater returns, display expected savings of upgrade options in energy and cost savings. Identify upgrades by cost (ex: most to least expensive) •Display time left for compliance and expected timeline of various upgrades •Display if DBID(s) are on target to be in compliance with BPS •Display energy performance comparison of their DBID(s) to other similar DBID(s). Point to Energize Denver Map. •Ability to link to external webpages i.e. Resource Hub webpage. •Ability for building owners to create an inquiry to get access to their customized portal. •Ability to have multiple DBIDs under one login if a building owner manages multiple properties. •Ability to have more than one portal account per DBID. •Ability for City Staff employee to have access to all dashboards at any time.	With Configuration	The Touchstone Benchmarking - Building Owner module has been proposed to provide this functionality and service to the portion of the under serviced makerting defined within the RFP. The current building owner modules provide the funcationality for the requested items, but will require configuration to provide Denver specific details (funding sources, links to external pages, paths to meeet performance requirements, etc.)
11.2	Non-Functional	Portal via desktop web	The solution shall provide a user and customer portal that can be utilized via standard desktop web browsers.	Out-of-the-Box	Both the Touchstone Benchmarking - City & State and Building Owner Modules are access through standard desktop web browsers. The system has also be optimized to operate on mobile devices with the same funcatinality as desktop browsers.
11.3	Non-Functional	Portal via smartphone/tablets	The solution shall provide a customer portal that can be utilized via standard smartphone mobile/tablet e device web browsers.	Out-of-the-Box	The Touchstone Benchmarking - Building Owner Module is accessable through standard mobile device web browsers
12	**Non-Functional**	**Data Retention**	**Data Retention encompasses the retention of digital and hardcopy artifacts and media. This would include the policies that define how much historical information will be available in the solution and in what conditions this information will be archived/removed.**		
12.1	Non-Functional	Retention	No limit on the number of years that the account history is retained. Information needs to be retained forever at this time.	Out-of-the-Box	Account history is never deleted
12.2	Non-Functional	Delete/Archive	The ability to delete or archive data in accordance to city standards.	Out-of-the-Box	The city has the ability to direct when data is deleted or archived.

ID	Requirement Type	Requirement Name	Requirement Description	Requirement Compliance	Vendor Response Comments
13	**Non-Functional**	**Compliance**	**Compliance includes conforming to rules, such as a specification, policy, standard or law. This includes standards and guidelines as set by City and County of Denver Technology Services. You will need to fill out a questionnaire from our Security department.**		
14	**Transition**	**Data Migration**	**Captures the data migration requirements necessary to transition from the current solution to the new solution. This could include requirements such as data mapping, data cleanup/verification, data transfer (extraction/loading), and any other testing to ensure for a successful data migration.**		
14.1	Transition	Salesforce	If a new solution is proposed, the data from Salesforce will need to be migrated into the new system. The data goes back 5 years. All DBID profiles and contacts and corresponding data fields will need to be migrated over.	With Configuration	Database Configuration Based on the discovery session input from the City's team, Overlay's web / database development staff will configure the core Touchstone CS platform. This will include, but is not limited to: • Building data tracked • Dashboard configurations • Building contact information • Portfolio Manager automated report download configuration • Direct APIs and automated webforms o i.e. online exemption request forms, API's to city data (when available) • Building Communication tracking configurations (email/phone) • Building performance metrics (audits, EE retrofit data)
15	**Transition**	**System Migration**	**Captures the solution migration requirements necessary to transition from the current solution to the new solution. This could include requirements such as orchestrating the cutover, special testing/validation, and any other requirements necessary to ensure a successful solution migration.**		
16	**Transition**	**Support**	**Captures the requirements necessary so that there is adequate resources and processes in place for ongoing support (e.g. help desk, etc.).**		
16.1	Transition	Online support	24*7 Self service online support center (FAQs, Log incident, etc.)	Out-of-the-Box	The System includes an online resource manual, FAQ and online ticket requesting system.
16.2	Transition	Email support	24*7 email support	Out-of-the-Box	General email support is provided during standard 9-5 working hours. Emergeny and disastor recovery support is provided 24/7 through our online ticket system and emergency support contact protocols.
16.3	Transition	Phone support	Standard business day telephone support	Out-of-the-Box	Standard business day telephone support is provided from 9-5 Monday through Friday.
17	**Transition**	**Training**	**Captures the training requirements necessary to use and maintain the new solution. This would include training requirements such as onsite, online, "train-the-trainer", and any other training as deemed necessary by the stakeholders.**		
17.1	Transition	Online tutorial	Please explain your online tutorial offered	Out-of-the-Box	Once all building data, automated email, and scorecard language have been uploaded and tested within the system, Overlay will provide one video recorded in-person training as well as additional web-based training session with City staff. The team will also provide Train the trainer services so that City staff can train new employees in the future. We will also provide digital training manuals for both use of the system as well as help center process flows. As new functionalities are provided in the future, additional online trainings will be provided. Upon completion of testing and city staff training, Overlay and the City staff will execute the final system acceptance and begin accepting building owner reporting and help center administration use of the system.
17.2	Transition	Train the trainer	The solution should include a train the trainer	Out-of-the-Box	Once all building data, automated email, and scorecard language have been uploaded and tested within the system, Overlay will provide one video recorded in-person training as well as additional web-based training session with City staff. The team will also provide Train the trainer services so that City staff can train new employees in the future. We will also provide digital training manuals for both use of the system as well as help center process flows. As new functionalities are provided in the future, additional online trainings will be provided. Upon completion of testing and city staff training, Overlay and the City staff will execute the final system acceptance and begin accepting building owner reporting and help center administration use of the system.
17.3	Transition	Live webinar training	Live online (webinar) training/refresher available	Out-of-the-Box	Once all building data, automated email, and scorecard language have been uploaded and tested within the system, Overlay will provide one video recorded in-person training as well as additional web-based training session with City staff. The team will also provide Train the trainer services so that City staff can train new employees in the future. We will also provide digital training manuals for both use of the system as well as help center process flows. As new functionalities are provided in the future, additional online trainings will be provided. Upon completion of testing and city staff training, Overlay and the City staff will execute the final system acceptance and begin accepting building owner reporting and help center administration use of the system.
17.4	Transition	Internal training procedures	Integrates local procedural considerations	Out-of-the-Box	Once all building data, automated email, and scorecard language have been uploaded and tested within the system, Overlay will provide one video recorded in-person training as well as additional web-based training session with City staff. The team will also provide Train the trainer services so that City staff can train new employees in the future. We will also provide digital training manuals for both use of the system as well as help center process flows. As new functionalities are provided in the future, additional online trainings will be provided. Upon completion of testing and city staff training, Overlay and the City staff will execute the final system acceptance and begin accepting building owner reporting and help center administration use of the system.
18	**Transition**	**Documentation**	**Captures the documentation requirements necessary to use and maintain the new solution. This would include document requirements such as user and administrative documentation, hardcopy and electronic artifacts, knowledge base, and other documentation as deemed necessary by the stakeholders.**		
18.1	Transition	Manuals	Online user manuals for future reference	Out-of-the-Box	We will also provide digital training manuals for both use of the system as well as help center process flows. As new functionalities are provided in the future, additional online trainings will be provided.
18.2	Transition	Upgrades	Supply electronic documentation instructions for upgrades	Out-of-the-Box	We will also provide digital training manuals for both use of the system as well as help center process flows. As new functionalities are provided in the future, additional online trainings will be provided.
19	**Transition**	**Warranty**	**Captures requirements on warranties (e.g. Hardware, Software, Services) and the remediation related to the warranty (e.g. hardware replacement, monetary reimbursement, etc.)**		

ID	Requirement Type	Requirement Name	Requirement Description	Requirement Compliance	Vendor Response Comments
19.1	Transition	Accurate Reports	The solution shall guarantee that all reports are available to run at all times, accurate and meet the specifications desired from within the system.	**Out-of-the-Box**	Touchstone CS includes a reporting tool that enables fast, accurate reporting on all aspects of the collected data and features. The system comes with standard reports as well as the ability to create and save custom reports. There are no limitations on the type and data included within the report. Report examples include: • Compliance reports • Building address & contacts • Standard building energy & emissions report • Exemption / extension reports • Mailing list reports • Ability to create custom reports All reports can be exported into Excel or csv.
19.2	Transition	Security Issues	The solution shall guarantee that all security issues be identified, addressed and resolved with who the City Staff Program Manager.	**Out-of-the-Box**	Touchstone will provide status updates on an identified security issues based on a mutually agreed upon interval until such time the problem is resolved. Communication frequency (in terms of updates provided from Touchstone to CCD during an incident) shall be determined on a case-by-case basis. The City and County of Denver and Touchstone will mutually agree upon frequency of update and Touchstone shall adhere to such an agreement.

Current Exemption Process

Attachment A - Current & Future Process Flows



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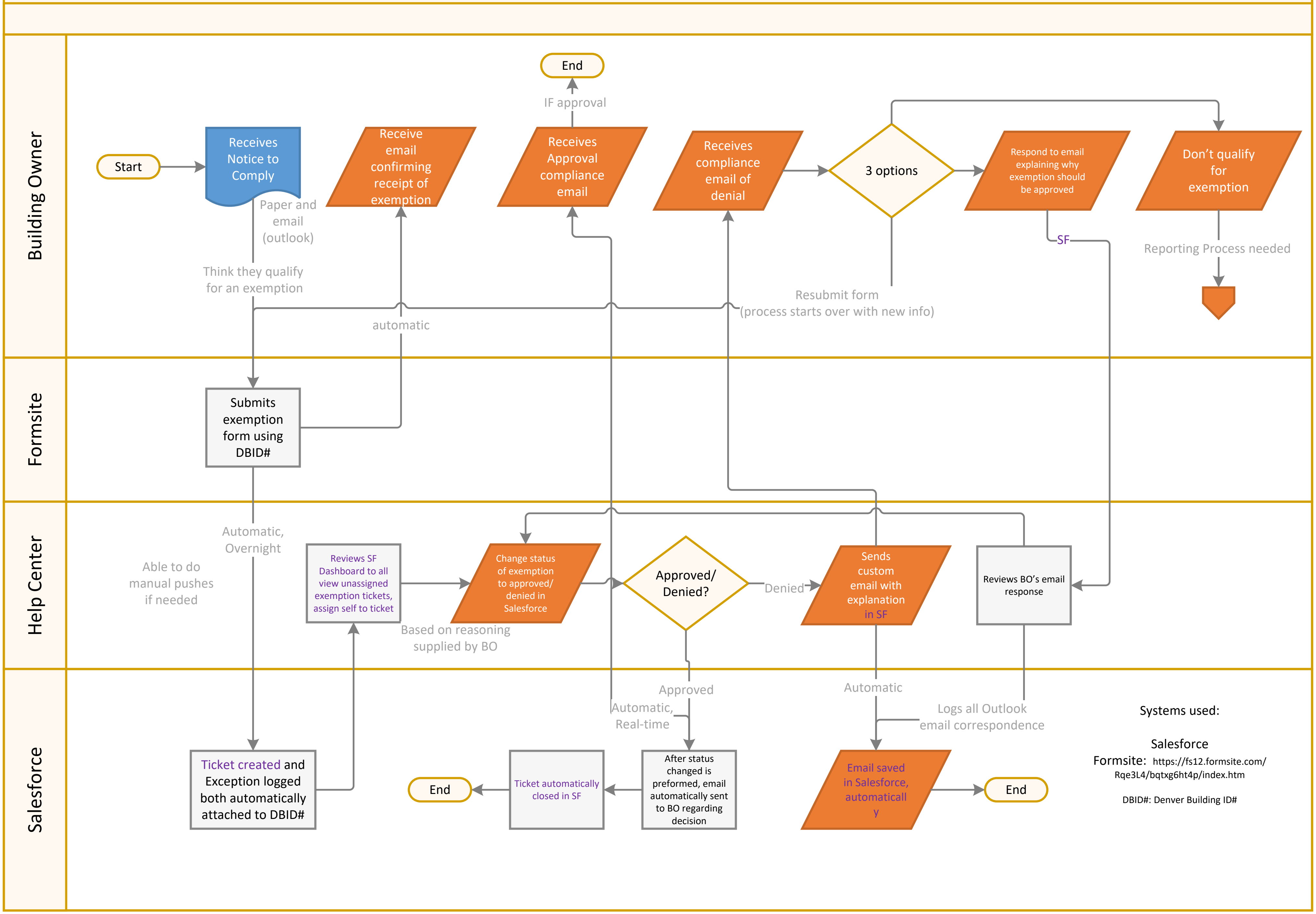
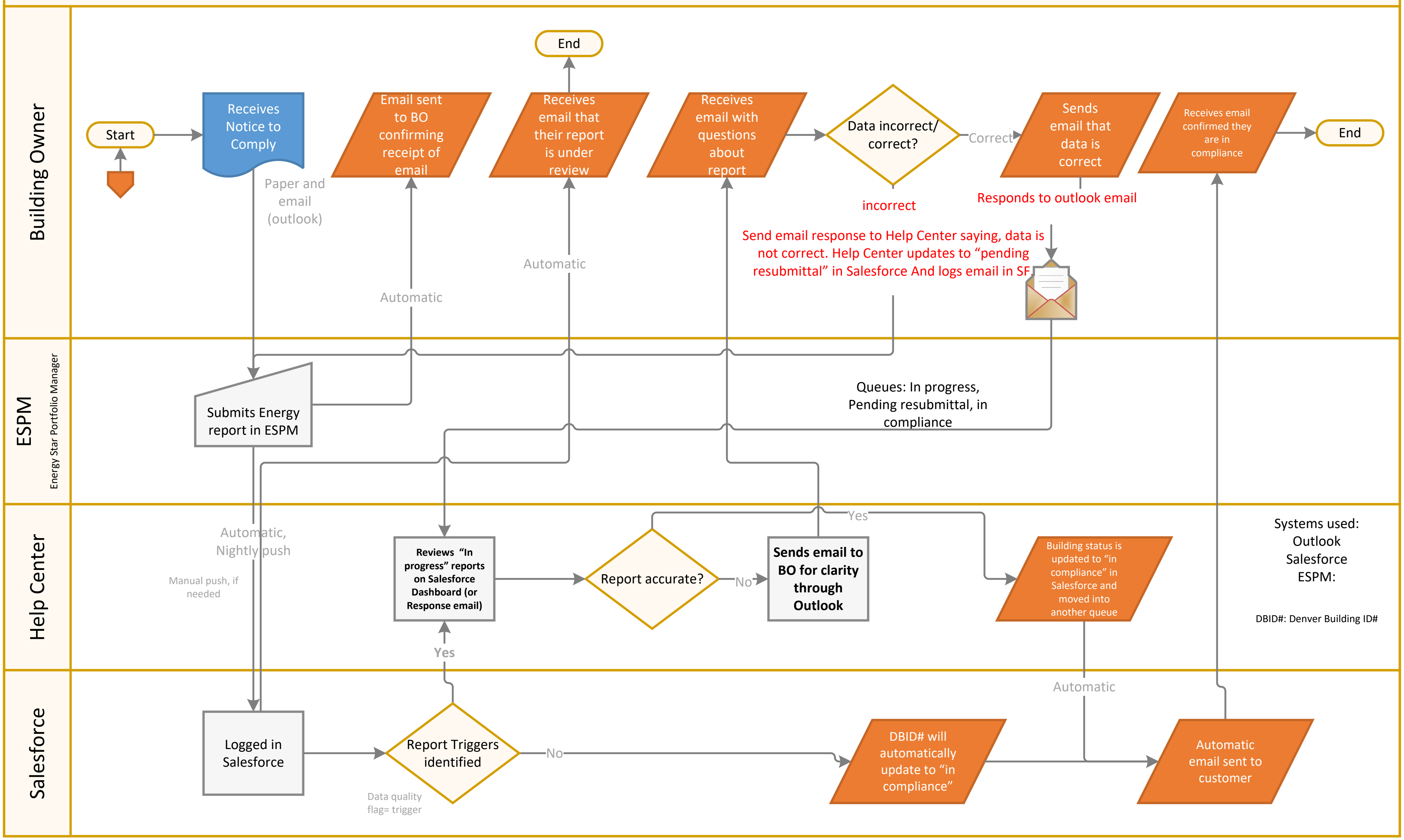
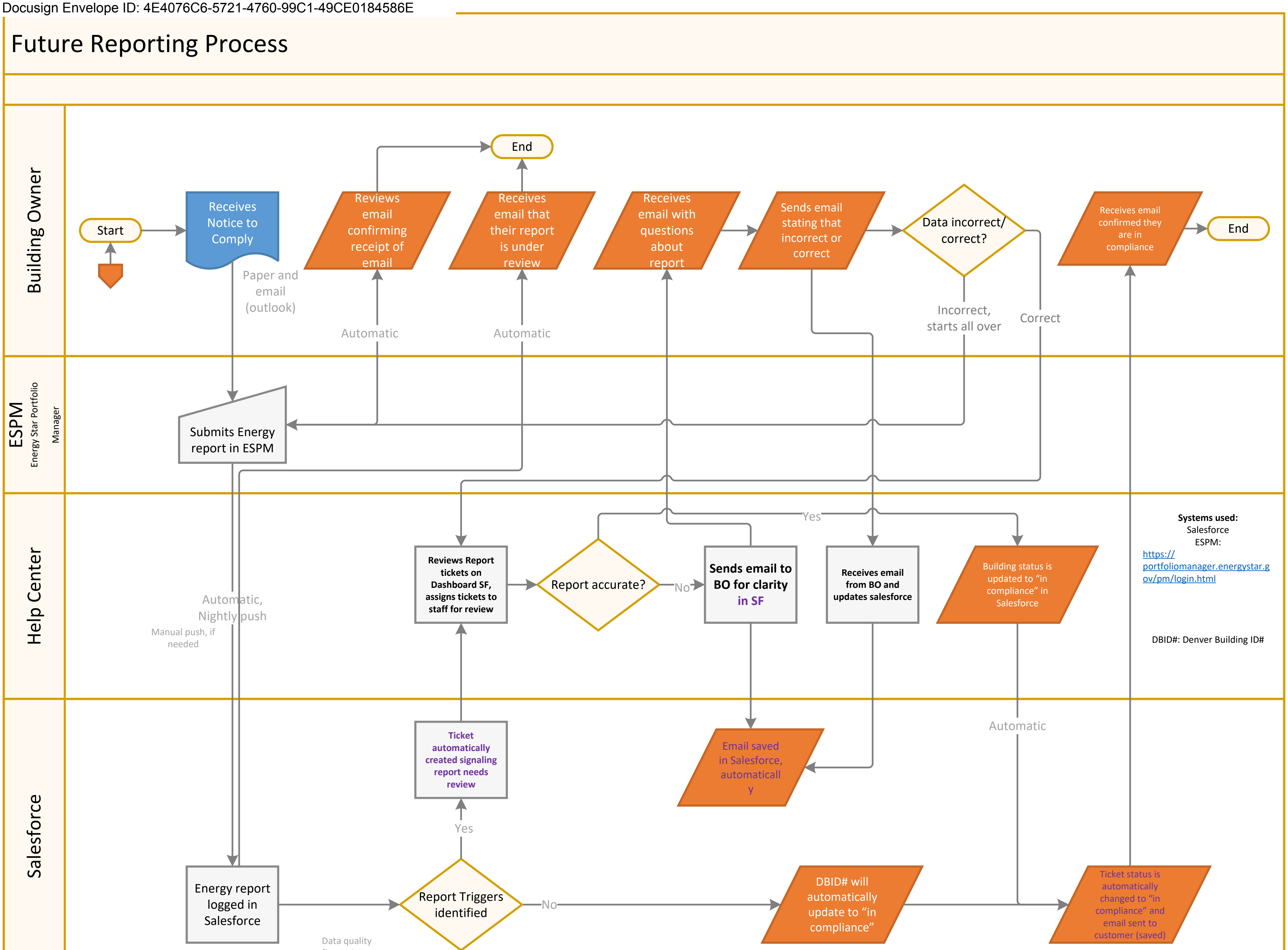
Future Exemption Process

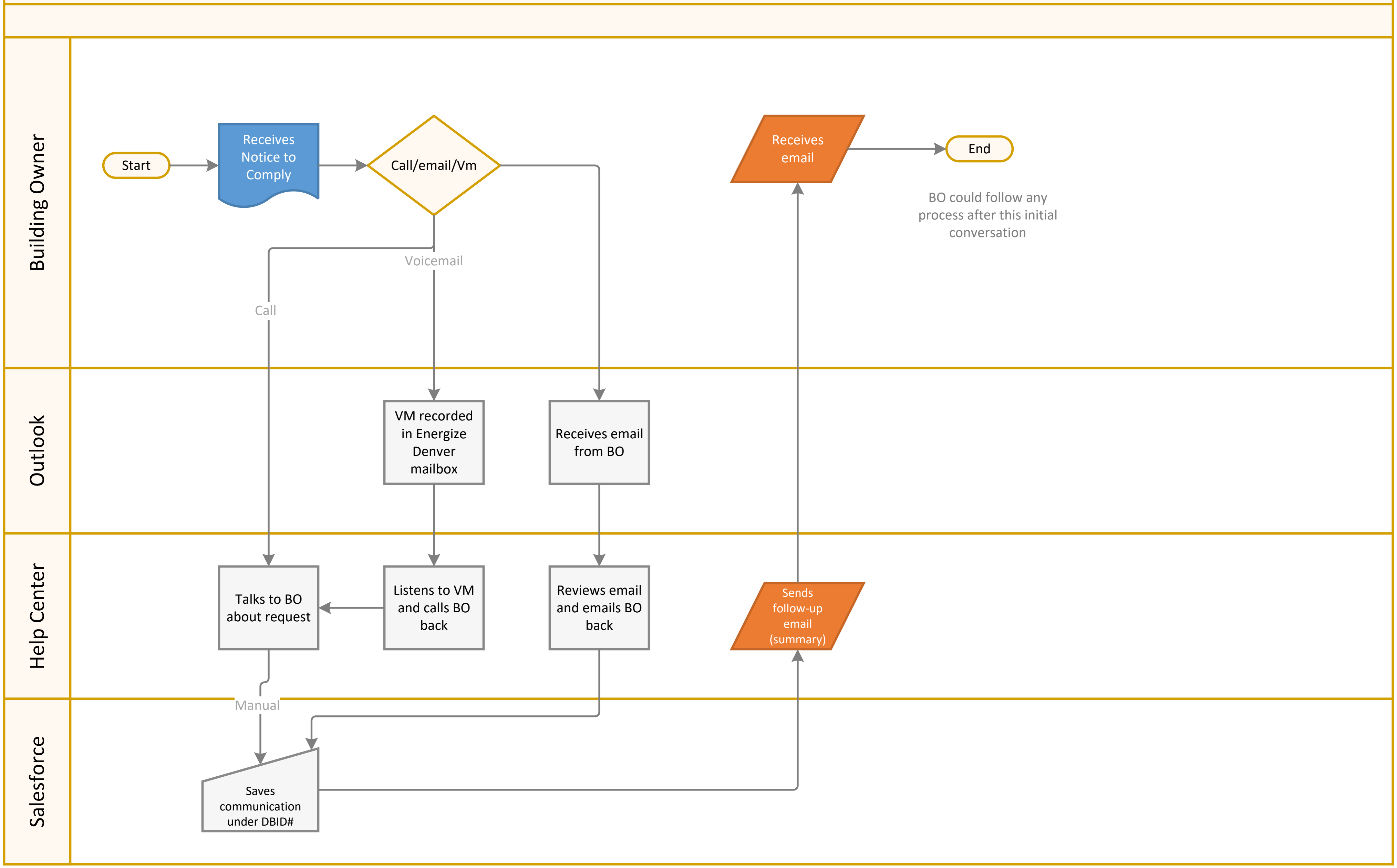


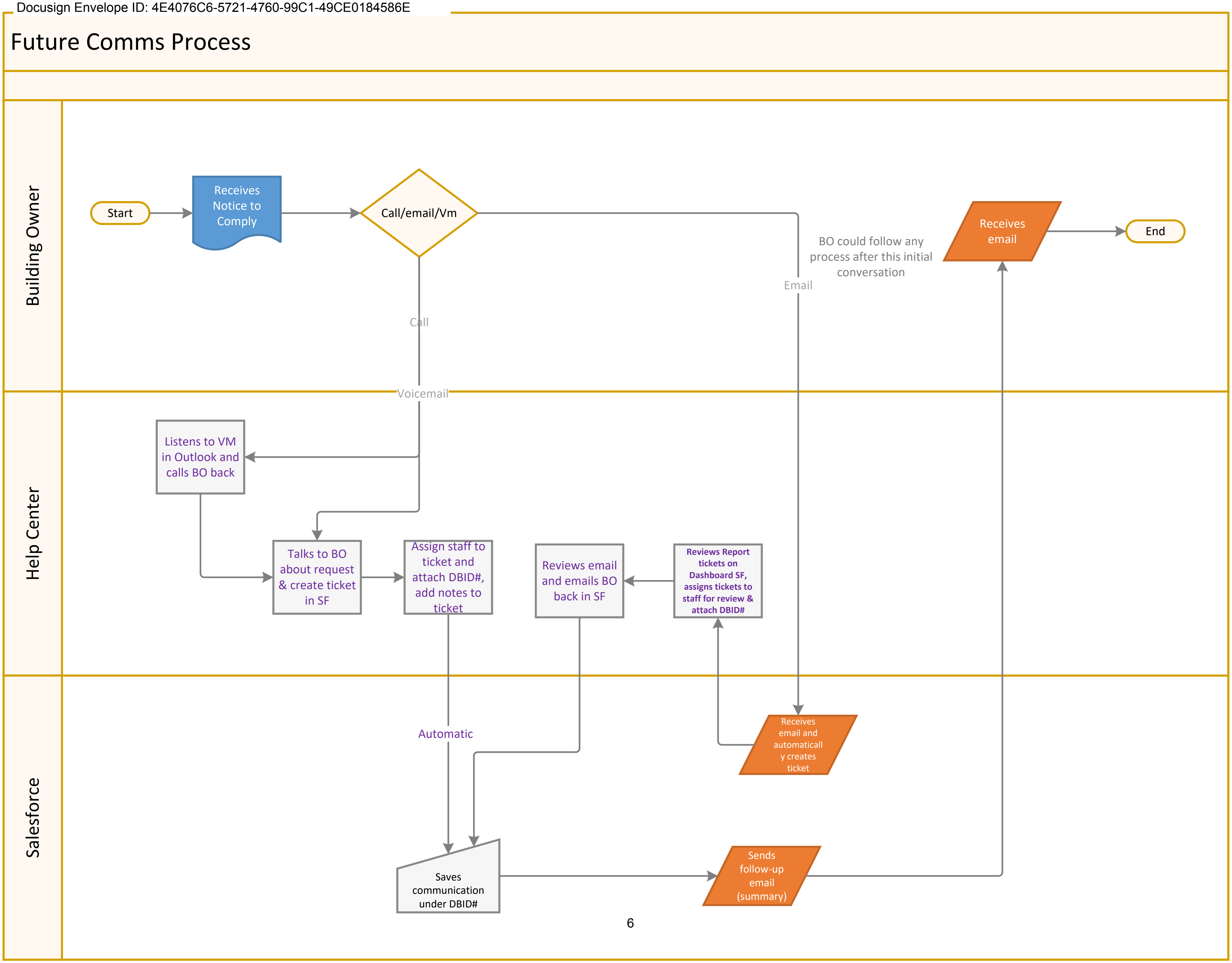
Current Reporting Process




Future Reporting Process
Building Owner
ESPM
Energy Star Portfolio Manager
Help Center
Salesforce
Start
Receives Notice to Comply
Paper and email (outlook)
Reviews email confirming receipt of email
Automatic
End
Receives email that their report is under review
Automatic
Receives email with questions about report
Sends email stating that incorrect or correct
Data incorrect/ correct?
Incorrect, starts all over
Correct
Receives email confirmed they are in compliance
End
Submits Energy report in ESPM
Automatic, Nightly push
Manual push, if needed
Reviews Report tickets on Dashboard SF, assigns tickets to staff for review
Report accurate?
No
Yes
Sends email to BO for clarity in SF
Receives email from BO and updates salesforce
Building status is updated to "in compliance" in Salesforce
Systems used:
Salesforce
ESPM:
https://portfoliomanager.energystar.gov/pm/login.html
DBID#: Denver Building ID#
Ticket automatically created signaling report needs review
Yes
Email saved in Salesforce, automatically
Automatic
Energy report logged in Salesforce
Data quality flag= trigger
Report Triggers identified
No
DBID# will automatically update to "in compliance"
Ticket status is automatically changed to "in compliance" and email sent to customer (saved)

Current Comms Process





Future Comms Process
Building Owner
Help Center
Salesforce
Start
Receives Notice to Comply
Call/email/Vm
Call
Voicemail
Email
BO could follow any process after this initial conversation
Receives email
End
Listens to VM in Outlook and calls BO back
Talks to BO about request & create ticket in SF
Assign staff to ticket and attach DBID#, add notes to ticket
Reviews email and emails BO back in SF
Reviews Report tickets on Dashboard SF, assigns tickets to staff for review & attach DBID#
Automatic
Receives email and automaticall y creates ticket
Saves communication under DBID#
Sends follow-up email (summary)

Budget – Exhibit B-3

The following pricing is based on the tasks set forth in the scope of work, available appropriations, and estimated number of buildings and building owners participating in the program.

Subject to the Maximum Contract Amount stated in the Agreement, the Executive Director is authorized to make adjustments to the budget to reallocate funds from one line item to another or from one budget year to the following year, if required due to a change in the number of buildings or building owners requesting services or if the City adjusts the eligibility criteria to expand services to additional buildings or in additional circumstances. Each adjustment to the budget must be made in writing, must document the circumstances justifying the adjustment, and must be signed by the Executive Director. Any other modifications to the Scope of Work, the Budget, or the Maximum Contract Amount shall be made by an amendment duly executed by the Parties.

Item/Description	**2022 Budget**	**2023 Budget**	**2024 Budget**	**2025 Budget**	**2026 Budget**
Task 1: Energize Denver Resource Hub					
Sub Task 1: Help Center Management: Benchmarking and Building Performance Requirements	$313,370	$528,370	$942,370	$1,148,370	$988,370
Sub Task 2: Material and Content Development for Benchmarking and Building Performance Policy	$61,050	$102,000	$332,000	$142,000	$112,000
Sub Task 3: Equity Priority Building Services	$80,000	$456,000	$545,360	$1,656,120	$2,039,320
Sub Task 4: Equity Priority Building Services Audits	$0	-	$897,180	$2,990,600	$1,839,219
Task 2: Energize Denver Small Buildings Resource Hub					
Sub Task 1: Development and Administration	$0	$75,000	$120,000	$70,000	$70,000

Sub Task 2: Help Center Services	$0	$25,000	$175,000	$225,000	$225,000
Task 3: Touchstone Support Systems					
Sub Task 1: Annual Software Licenses*	$30,580	$30,580	$141,880	$464,480	$464,480
Sub Task 2: Software Enhancements	$0	-	$320,000	$70,000	$50,000
Total	**$485,000**	**$1,216,950**	**$3,473,790**	**$6,766,570**	**$5,788,389**
Total 5-year budget					**$17,730,699**

*License costs for Touchstone IQ for Buildings will be billed per building annually in license increments of 500. Any unused licenses will be credited in the following year.