

CT Evaluation Committee Contracting Timeline 2019
(abbreviated list; many interim individual emails to /from contractors, etc.)

	Lisa	Eversource	UI	Comments
May 2019	5/1-5/3:	Lisa sent score sheets, memo scopes, and budgets for contracts to UI and Eversource		
		5/2 ES sent forms for GTC and NA; Lisa distributed	5/2: UI sent PSA and SOW templates; Lisa sent to all firms; Skumatz asked if any other forms.	
		May: W9 and Exceptions emails sent back and forth		
		5/29: ES sent new form-New Vendor forms-to be filled out; distributed.	5/31: no word from UI.	
	Sent	5/31: Update with specific gaps by firm. Firms completed forms and sent in.	5/31: Taren sent email entitled "Evaluation Roadblock"; asked for meeting with Taren, Lano, Riddle, Skumatz.	ES responsive; UI no progress; special call needed
June 2019			6/11, 10:30 special meeting held on (lack of) UI Contracting progress to try to avoid problem from last year's UI Delays. Among questions asked was about contracting dollar max - Taren and Skumatz wanted to be proactive. Riddle didn't want to address up front. Cautious - told not to worry.	
			6/28 from TT: "Working on setting up New awardees in system. Lacking vendor forms for SCS". Only had W-9... followed up by request for insurance for SCS	Contracting status asked in EC monthly
		Firms submitted missing forms	6/28: 10 emails from TT on contracting - 1-2 firms. Lack of interim progress - "was working on prioritized projects. Has the morning to review information for CT studies". One email notes possible contracting dollar max issue (\$1.14 vs. 1.06 m). If higher, must go to IOC and can't approve until Sept. Asked what phasing / prioritization code meant.	UI - No word for 2.5 weeks after special call; noted gap from time working on prioritized projects; dollar max issue raised.
July 2019			7/1: email but recalled / on dollar max issue	
			7/2: Evergreen forms gap	
	LAS sent		7/3 Lisa to UI: Sent note saying we could delay part of budget for 1906 to get under total; confusion about 30%/70%, several emails (one 7/17)	
		7/3 ES progress enough for most firms to start		Contracting status asked in EC monthly
		7/18: ES clear status report with gaps; communication every few days to weekly on any remaining gaps.	7/11: asked again about w9 for 1 firm	One-off issues only.
			7/22 question about SEM dollar amount	
Aug 2019		Committee determined to bill ES first then catch up UI (look at notes for exact month)	8/7: TT asked for more contracting process backup information (date, invited, participated, qualified, evaluation, clarifications, B&F, award, what sent to non-awardees);	Contracting status asked in EC monthly
	LAS sent		8/7: Skumatz replied with memo sent May; would look for any remaining gaps; noted it shouldn't stop requests for forms from firms.	
			8/8: TT says she needs my documentation so things can be finalized. "I believe I have everything I need from the awarded vendors so they can be set up in our system".	Noted nearly done; asked if anything else needed.
			8/15: Lisa sent documents with info including list of vendors, short answers to embedded questions in email. "Let me know if you need anything else".	
Sept 2019			9/5: TT sent email entitled "Finishing Up - Evaluation Studies" with follow-up question - were there bid changes from B&F; Skumatz responded.	Email called "finishing up". New form sent and distributed and returned.
	LAS sent		9/5: TT sent bid form; Skumatz forwarded; sent in 9/5-9/20	Contracting status asked in EC monthly
			9/20: 2 firms left for bid form (Evergreen and SCS); both sent 9/23	
Oct 2019		10/29 asked several contracting process documentation questions. Skumatz responded 10/29, 11/15, finished one harder question 12/12.	10/1: TT "Thanks, I've added to my documentation."	No word from UI all month
				Contracting status asked in EC monthly
Nov 2019		11/21 - After hearing nothing more for many weeks, and requests at each Eval Cmte meeting, Lisa sent email to UI (incl. Riddle and Taren) requesting specific status update <u>by project</u> , asking for X's and dates. I noted no emails received while I'd been on vacation; searched emails for TT and RO. Requested response.		No word from UI all month (2nd month). Sent request for specific status.

	Lisa	Eversource	UI	Comments
			11/21: auto email from TT - gone on vacation	Contracting status asked in EC monthly
		In Nov, ES asked for COI forms to be completed and forwarded form; distributed and responded.	11/21: Oswald response "Contracts are going to our budget management committee next week. We are hoping we can get them executed by the following week (week of 12/2)." NO response on status / forms by project.	said will be done week of 12/2
Dec 2019	12/10 -	Waited until after week of 12/2 and re-sent request to UI asking for progress by EACH PROJECT. No response.		Contracting status asked in EC monthly
			12/16: Oswald and TT: Need SOW and special signature block.	
			12/16: Skumatz responded this is a new request / first word on this need and reminded SOWs sent in May.	NEW Forms requested after 'nearly done'; 'expect to be done week of 12/2', etc.
	LAS sent		12/16 - Skumatz resent all SOWs; cc'd Taren on status	
			12/17 TT: gives status on PSAs and a few other documents by firm. Says "If you have previously sent, please resend. I'm sorry for additional / possibly duplicative work but we had an outlook migration a short time ago and I'm just realizing I'm missing some files..." Skumatz forwarded requests to firms.	Week of 12/2 supposed to be done, but now finding forms missing / bad transfer?
	LAS sent		12/17: Skumatz sent back questions: are the 3 firms with PSAs good to go; asked for blank PSA for questions, clarified SCS / NMR relationship again, and winner / loser memo sent earlier	Questions / no response.
	12/17-18 LAS Informed contractors of the status of UI contracting and sent UI info requests.			
			12/18-12/30 contractors sent forms into UI	
			12/23-12/30 : Received 19 emails from TT to firms on contracting / SOW, etc.	Attempt to hurry up / catch up during Holidays; many on vacation. No comprehensive status report. Other forms needed? Unknown. Unknown dollar max problem also?