

REQUEST FOR PROPOSALS

No. 20-001

For

DATA MANAGEMENT SERVICES AND CUSTOMER CALL CENTER

On Behalf of

SAN DIEGO COMMUNITY POWER (SDCP)

Issue Date: March 11, 2020

Bid Response Deadline: April 1, 2020

San Diego Community Power

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1. GENERAL INFORMATION

A. STATEMENT OF INTENT

This Request for Proposals (RFP) seeks a firm (Contractor) to provide data management services and a customer service center for operation of a Community Choice Aggregation (CCA) program in the San Diego region. The term of the contract will be for 36 months with option to extend for an additional year. SDCP's target Phase 1 start date is March 2021, subject to ongoing discussions with SDG&E and SDCP power service providers.

B. BACKGROUND

San Diego Community Power (SDCP) is the new electricity provider for the cities of Imperial Beach, Encinitas, La Mesa, Chula Vista, and San Diego, within San Diego County. SDCP's JPA Agreement is the first in California to explicitly state that it will reach 100 percent renewable energy availability and usage by no later than 2035 and beyond, in advance of current State targets. The member cities formed SDCP to achieve this and other goals collaboratively and with greater regional impact. SDCP anticipates beginning service in 2021 and serving approximately 930,000 customer accounts and 7,200 GWh.

As further described below, the services requested in this RFP include:

1. Managing SDCP customer account data;
2. Exchanging customer usage, billing and payment data with San Diego Gas & Electric (SDG&E);
3. Responding to SDCP customer service calls; and
4. Addressing SDCP customer service issues.

C. RFP PROCESS

This RFP seeks proposals from qualified service providers to address the full scope of services briefly enumerated in section B (above). By way of this RFP, SDCP intends to procure the aforementioned services in a manner that maximizes the quality of services while also maximizing value to SDCP and, by extension, the customers of SDCP. Proposers must be able to show that they are capable of performing the services requested for a term of three years, with the option to extend. Such evidence includes, but is not limited to the Proposer's demonstrated competency and experience in delivering services of a similar scope as well as the type and local availability of the proposer's personnel and other requisite resources.

2. SCOPE OF WORK

A. DESCRIPTION

The requested services are described below:

(a) Electronic Data Exchange Services:

1. Process CCA Service Requests (CCASRs) from/to SDG&E which specify the changes to a customer's choice of services such as enrollment in CCA programs, customer initiated returns to bundled utility service or customer initiated returns to direct access services (814 Electronic Data Interchange Files).
2. Obtain all customer usage data from SDG&E's Metered Data Management Agent (MDMA) server to allow for timely billing (according to SDG&E requirements) of each customer (867 Electronic Data Interchange Files).
3. Maintain and communicate the amount to be billed by SDG&E for services provided by SDCP (810 Electronic Data Interchange Files).
4. Receive and maintain all data related to payment transactions toward CCA charges from SDG&E after payment is received by SDG&E from customers (820 Electronic Data Interchange Files).
5. Process CCASRs with SDG&E when customer status changes.
6. Contractor shall participate in the Customer Data Acquisition Program (CDA) beta testing for Smart Meter data sharing as SDCP's Data Manager.

(b) Qualified Reporting Entity (QRE) Services:

1. Consistent with terms and conditions included in the Qualified Reporting Entity Services Agreement(s) between SDCP and Contractor, serve as QRE for certain locally situated, small-scale generators or other distributed energy resources supplying electric energy to SDCP through a feed-in tariff (FIT) or other mechanism.
2. Submit a monthly generation extract file to Western Renewable Generation Information System (WREGIS) on SDCP's behalf, which will conform to the characteristics and data requirements set forth in the WREGIS Interface Control Document for Qualified Reporting Entities.
3. Contractor shall receive applicable electric meter data from SDG&E for SDCP distributed energy resource projects, consistent with SDG&E's applicable meter servicing agreement, and shall provide such data to SDCP for purposes of performance tracking and invoice creation.

(c) Customer information System:

1. Maintain an accurate database of all eligible accounts who are located in the SDCP service area and identify each account's enrollment status (opt out, program enrollment), rate tariff election(s), payment history, collection status, on-site generating capacity, if applicable, and any correspondence with customer as well as other information that may become necessary to effectively administer SDCP as mutually agreed by parties from time to time.

- i. Allow SDCP to have functional access to the online database to add customer interactions and other account notes.
- ii. Allow SDCP to view customer email or written letter correspondence within online database.
- iii. Maintain and provide as-needed historical usage data on all customers from a time period equal to the lesser of either (a) the start of customer service to present or (b) five years. Maintain viewing access, available to appropriate SDCP staff, to view SDG&E bills for SDCP customers, including supporting the intuitive parsing and labeling of SDG&E provided files. Maintain accessible archive of billing records for all SDCP customers from the start of SDCP service or a period of no less than five years.
- iv. Maintain and communicate as needed record of customers who have been offered service with SDCP but have elected to opt out, either before or after starting service with SDCP.
- v. Maintain and communicate as needed records of Net Energy Metering credits and generation data for customers to be posted on bill and settled as per SDCP's Net Energy Metering policy, once developed.
- vi. When requested by SDCP, place program charges on the relevant customer account, referenced by its unique identifier.
- vii. Identify customers participating in various SDCP programs in database.
- viii. Include various program payment information in all relevant reports.
- ix. Perform quarterly SDCP program reviews to assess appropriate customer charge level.
- x. Maintain all customer data according to SDCP's customer privacy policy, once developed, and the requirements of relevant California Public Utilities Commission decisions including D.12-08-045, including a daily backup process.
- xi. Maintain a Data Management Provider Security Breach Policy.

(d) Customer Call Center:

- 1. Provide professional Interactive Voice Response (IVR) recordings for CCA customer call center.
 - i. In the event third party services are required to translate prompts or scripts into languages specified by SDCP, any charges incurred by Contractor as a result of these will be passed by Contractor onto SDCP.
- 2. Provide option for IVR self-service and track how many customer start and complete self-service options without live-agent assistance.
- 3. Staff a call center between the hours of 8 AM and 5 PM PPT Monday through Friday, excluding contract holidays.
 - i. No less than 2 client service representatives will be dedicated to SDCP unless both Parties mutually agree to adjust staffing levels after reviewing call volumes and related call center statistics.

- ii. At SDCP's written request, and subject to prices set to be negotiated between Parties and with three (3) months' notice prior to taking effect, staff a call center between the hours of 7 AM and 8 AM PPT, and 5 PM and 7 PM PPT, Monday through Friday, excluding contract holidays.
- 4. Provide sufficient number of Contractor staff available to manage escalated calls between the hours of 8 AM and 5 PM PPT Monday through Friday, excluding contract holidays.
- 5. Contractor will adhere to the following performance standards during Non-Enrollment Periods:
 - i. Ensure that a minimum of 80% of all calls will be answered within 45 seconds.
 - ii. Ensure that a minimum of 90% of all calls will be answered within 3 minutes.
 - iii. Achieve a no greater than 5% abandon rate for all calls.
 - iv. 100% of voicemail messages answered within one (1) Business Day and provide report to SDCP upon request that substantiates this requirement has been met.
 - v. 100% of emails receive an immediate automated acknowledgement and provide report upon request to SDCP that substantiates this requirement has been met.
 - vi. 95% of emails receive a customized response within one (1) Business Day and provide report to SDCP upon request that substantiates this requirement has been met.
 - vii. 100% of emails receive a customized response within three (3) Business Days and provide report to SDCP upon request that substantiates this requirement has been met.
- 6. Contractor will adhere to the following performance standards during Statutory Enrollment Periods:
 - i. Ensure that a minimum of 75% of all calls will be answered within 60 seconds.
 - ii. 100% of voicemail messages answered within one (1) Business Day and provide report to SDCP upon request that substantiates this requirement has been met.
 - iii. 100% of emails receive an immediate automated acknowledgement and provide report upon request to SDCP that substantiates this requirement has been met.
 - iv. 95% of emails receive a customized response within one (1) Business Day and provide report to SDCP upon request that substantiates this requirement has been met.

- v. 100% of emails receive a customized response within three (3) Business Days and provide report to SDCP upon request that substantiates this requirement has been met.
 - vi. Achieve a no greater than 10% abandon rate for all calls.
- 7. Provide sufficient call center staffing to meet the requirements set forth herein.
- 8. Provide callers with the estimated hold time, if applicable. Provide an automated 'call back' option for callers who will be put on hold for an estimated five minutes or longer.
- 9. Record all inbound calls and make recordings available to SDCP staff upon request. Maintain an archive of such recorded calls for a minimum period of 24 months.
- 10. Track call center contact quality with criteria including:
 - i. Use of appropriate greetings and other call center scripts
 - ii. Courtesy and professionalism
 - iii. Capturing key customer data
 - iv. Providing customers with correct and relevant information
 - v. First-contact resolution
 - vi. Accuracy in data entry and call coding
 - vii. Grammar and spelling in written communications (email and chat)
- 11. Evaluate customer satisfaction through voluntary customer surveys that ask general questions about call quality, call resolution, and how satisfied the customer was with the service received.
- 12. Response to customer emails.
- 13. Receive calls from SDCP customers referred to Contractor by SDG&E and receive calls from SDCP customers choosing to contact Contractor directly without referral from SDG&E.
- 14. Provide the call center number on SDG&E invoice allowing SDCP customers to contact the call center. Collect and/or confirm current email, mailing address and phone number of customers and add to or update database during inbound call.
- 15. Collect permission (via voice recording, email request, or electronic form submittal) from customers to send electronic correspondence instead of printed mail.
- 16. Response to telephone inquiries from SDCP customer using a script developed and updated quarterly by SDCP. For questions not addressed within the script, refer inquiries either back to SDG&E or to SDCP.
- 17. Response to customer inquiries received through telephone calls, email, fax and/or web-portal within the times and guidelines in this RFP and the Agreement.
- 18. Upon request, coordinate with SDG&E and other SDG&E territory CCAs to participate in call center reviews up to twice per calendar year.

19. Ensure monthly statistics reports are provided in a timely and consistent manner as mutually agreed upon by Parties.
20. Provide recurring statistics reports focused on Call Center activities in a timely and consistent manner as mutually agreed upon by Parties.
21. Use commercially reasonable efforts to make Spanish speaking call center staff available to customers during Regular Business Hours.
22. Provide translation services for inbound calls for the following languages:
 - i. Spanish, Tagalog, Cantonese, Mandarin, and Vietnamese.
23. Create and maintain online forms for the SDCP website so the customers may perform program related tasks including, but not limited to, opt-up, opt-down, or opt-out from the SDCP website. These program changes will be integrated into the Customer Relationship Management system on a daily or more frequent basis.
24. Participate in periodic meetings with SDCP to review operations on a schedule mutually agreed upon by Parties.

(e) Billing Administration:

1. Review application of SDCP Rate Schedules to SDG&E accounts to ensure that the proper rates are applied to the accounts.
2. Review application of SDCP Rate Schedules to SDG&E accounts to ensure that the proper rates are applied to the accounts.
3. Timely submit billing information for each customer to SDG&E to meet SDG&E's billing window.
4. Use commercially reasonable efforts to remedy billing errors for any customer in a timely manner, no more than two billing cycles.
5. Assist with annual settlement process for Net Energy Metering customers by identifying eligible customers, providing accrued charges and credits, and providing mailing list to CCA designated printer.
6. Provide customer mailing list to SDCP designated printer for new move-in customer notices and opt out confirmation letters routinely within 7 days of enrollment or opt out.
7. Provide customer mailing list to SDCP designated printer for customers with overdue payments and return customers to SDG&E bundled service in accordance with SDCP's late payment and collections policies.
8. Send certain SDCP program charges for non-SDCP customers, when supported by SDG&E, based on information provided to Contractor by SDCP.
9. Send certain SDCP program charges as a separate line item to SDG&E for placement on monthly bill during term of repayment.
10. Contractor will adhere to the following performance standards for this service:
 - i. 99% of SDCP charges sent to SDG&E will be free of Contractor error and within SDG&E Billing Window, on a rolling 12-month basis (current month and preceding 11 months).

(f) Rate Schedule Maintenance:

1. Maintain a table of Rate Schedules, offered by SDCP to its customers, within Contractor's billing system.
 - i. Complete Value Only Rate Changes within 10 Business Days once Contractor has confirmed it is in receipt of a valid Rate Template.
 - ii. Complete Structural Rate Changes within 40 Business Days once Contractor has confirmed it is in receipt of a valid Rate Template.
 - iii. A Rate Template will be considered valid if it meets the expected formatting requirements as set forth by Contractor and acknowledged by SDCP, and the Rate Schedules it contains align with published SDCP tariffs. Upon receipt of a Rate Template, Contractor will review it per these guidelines and after SDCP has corrected any errors, if present, Contractor will communicate to SDCP that a valid Rate Template has been received and work will commence as per the timelines indicated above.
 - iv. Should SDCP submit updates after Contractor has begun work on a valid Rate Template, SDCP understands this may be considered a new Rate Change.
2. Conduct no more than three Value Only Rate Changes within Contractor's billing system at no additional cost to SDCP within each calendar year.
3. Conduct no more than one Structural Rate Change within Contractor's billing system at no additional cost to SDCP within each calendar year.
4. At SDCP's direction and for the corresponding price set to be negotiated between Parties, conduct additional Value Only or Structural Rate Changes beyond those included as noted above.

(g) Reporting:

Report	Frequency	Delivery Method
Aging	Weekly, Monthly	SFTP
Call Center Stats	Weekly, Monthly	Email
Cash Receipts	Weekly, Monthly	SFTP
SDCP Invoice Summary Reports	Monthly	SFTP
Days To Invoice	Weekly, Monthly	SFTP
Program Opt Up with Address	Weekly, Monthly	SFTP
Utility User Tax (UUT) where applicable	Monthly	Email
Invoice Summary Report	Weekly, Monthly	SFTP
Invoice Summary Report – Mid Month	Monthly	SFTP
Monthly Transaction Summary	Monthly	Email

Opt Out with Rate Class	Weekly, Monthly	SFTP
Retroactive Returns	Monthly	Email
Sent to Collections	Monthly	Email
Snapshot	Weekly	SFTP
Snapshot with Addresses	Weekly	SFTP
Unbilled Usage	Monthly	SFTP
Full Volume Usage by Rate Class	Monthly	SFTP
Performance Standards	Monthly	Email

(h) Settlement Quality Meter Data:

1. Contractor shall provide SDCP or SDCP's designated Scheduling Coordinator (SC) with Settlement Quality Meter Data (SQMD) as required from SC's by the California Independent System Operator (CAISO).
2. Upon SDCP's request, Contractor shall submit the SQMD directly to the CAISO on behalf of SDCP or SDCP's designated SC.
3. Contractor will use, when available, AMI usage data as provided by SDG&E through its Share My Data platform in its SQMD aggregation methodology.

(i) Data Tools:

1. Establish a data warehouse environment comprised of data related to the services provided by Contractor under the contract.
2. Provide access for SDCP staff to query the data warehouse environment.
3. Provide access for other organizations under contract with SDCP to query the data warehouse environment, if a business need is determined by SDCP to ensure seamless communication of data across SDCP operations.
4. Data made available in the data warehouse shall include:
 - i. AMI usage data provided by SDG&E through their Share My Data (SMD) platform
 1. Prior to loading this data into the data warehouse, Contractor will make commercially reasonable efforts to process the raw SMD data and associate usage data with customer accounts in Contractor's CIS.
 2. Contractor will query SDG&E systems for updated usage data and make reasonable efforts to update the data warehouse on a daily basis.
 3. Contractor and SDCP will establish mutually-agreed service level metrics and protocols for daily processing and loading of SMD data.
 - ii. Customer account information and characteristics from the customer list provided by SDG&E and supplemented by the following data from CRM and CIS:

1. SDCP participation history
2. Product elections
3. Opt-out activity
4. SDCP rate schedule
5. Contractor will make reasonable efforts to provide additional characteristics requested by SDCP
- iii. Billing data from Contractor's CIS
- iv. SQMD submission data
5. Contractor may, from time to time and at its sole discretion, update the functionality available in the data warehouse which may include, among others, adding or maintaining data visualizations, self-service reporting tools, self-service analytical tools, and Application Program Interface (API) points.
6. Contractor may, at its sole discretion, engage with SDCP and other Contractor clients to elicit their input on required functionality, data elements, and system design as it pertains to the development, maintenance, and evolution of its data environment.
7. In the absence of the data warehouse or adequate data within the data warehouse for SDCP to Self Service, Contractor shall assist SDCP in compiling Ad Hoc sales, customer, and usage reports from time to time as may be requested by SDCP, with each such request being accompanied by mutually agreed upon requirements and proper notice.
8. Contractor will provide technical support to access the data warehouse and documentation describing the data. SDCP will provide staff with technical database expertise to engage with Contractor in the implementation and use of the data warehouse.
9. Contractor will ensure timely data sharing with SDCP's other vendors, as necessary.
10. Data warehouse environment availability expected by end of Q1 2021.
- (j) Value Added Services:
 1. SDCP is interested in any value-added services that may be beyond what is already described in the scope of work above. These can relate to supporting a successful CCA program launch, providing additional customer account and/or behavior analyses to support improved customer attraction or retention, accessing and utilization of smart meter data, etc.
 2. Contractor should provide a description of any proposed value-added services, their ability to structure and execute the services, and the costs and benefits to SDCP.

3. GENERAL TERMS AND CONDITIONS

1. Confidentiality. All data and information obtained from or on behalf of SDCP by the winning Contractor(s) and its agents in this RFP including reports, specifications and

data shall be treated by the Contractor and its agents as confidential. The contractor and its agents shall not disclose or communicate this information to a third party without written consent from SDCP or use it in advertising, publicity or in another job unless written consent is obtained from SDCP. Generally, each proposal and all documentation, including financial information, submitted by a Proposer to SDCP is confidential until a contract is awarded, when such documents become public record under State and local law, unless exempt under CPRA.

2. California Public Records Act (CPRA). All proposals become the property of SDCP which is a public agency subject to the disclosure requirements of the CPRA. If a Proposer feels that any part of its submission is proprietary information, please identify by section, paragraph and page the information the Proposer believes is proprietary. DO NOT MARK YOUR ENTIRE PROPOSAL AS CONFIDENTIAL. Only mark those elements that you believe contain proprietary information if necessary. In the event of a CPRA request seeking a proposal, this information will be reviewed by SDCP's attorneys for applicability of an exemption under the CPRA. Notwithstanding the above, SDCP provides no guarantee that any part of Proposer's information will be withheld or redacted in response to a CPRA request or other applicable legal requirement or court order.
3. Contract Pricing and Compensation. The total value of this contract is undetermined. The schedule of compensation will be mutually negotiated. Proposers should clearly identify proposed contract duration(s) and associated costs within their proposals. The prices quoted for services must be valid for the entire period indicated unless otherwise conditioned by the Proposer in its proposal. Please provide any assistance with start-up activities your business can provide and flexible invoicing timelines that could minimize initial startup capital requirements.
4. Contractor Invoices. The Contractor shall deliver a monthly invoice to SDCP with detailed expenses so as to ensure that expenditures are not-over extended relative to the agreed upon budget and compensation.
5. Contract Extension. The term of the contract may be extended by mutual consent for an additional period to be negotiated six months prior to the end of the contract.
6. Incurring Cost. This RFP does not commit SDCP to award or pay any cost incurred in the submission of the proposal.
7. At Risk. Proposers should understand that work done in the first quarter of 2020, prior to CPUC certification of the Agency's Implementation Plan and a credit and banking service agreement adopted by the SDCP Board, will be undertaken at the Proposer's risk. If, in the very unlikely event the CCA is not certified or a line of credit approved, SDCP may elect to cease further services at no retroactive or prospective cost to SDCP.
8. Addenda. SDCP reserves the right to revise the RFP documents. Any changes to the requirements will be made by written addenda to this RFP. Any written addenda issued pertaining to this RFP shall be incorporated into the terms and conditions of any contract resulting from this RFP. Addenda will be posted on the SDCP website. It is the

responsibility of the Proposers to check the SDCP website to determine if any addenda have been issued.

9. Insurance. Proposers should be prepared to satisfy SDCP's insurance requirements specified under the contract. A certificate of insurance and other applicable proof of required insurance must be provided by the successful Proposer(s) prior to contract execution in accordance with the executed contract.
10. Ownership of Materials. All original plan documents and other materials prepared by or in possession of the Contractor as part of the work or services under the contract shall become the permanent property of SDCP and shall be delivered to upon demand.
11. Release of Reports and Information. Any reports, information, data, or other material given to, prepared by or assembled by the Contractor as part of the work or services under the contract shall be the property of SDCP and shall not be made available to any individual or organization by the Contractor without the prior written approval of SDCP.
12. Copies of Reports and Information. If SDCP requests additional copies of reports, specifications, or any other material in addition to what the Contractor is required to furnish in limited quantities as part of the work or services under these specifications, the Contractor shall provide such additional copies as are requested, and SDCP shall compensate the Contractor for the costs of duplicating of such copies at the Contractor's direct expense.
13. Termination. A termination provision will be negotiated between the parties that includes provisions on termination for cause and termination for convenience.

4. REQUEST FOR PROPOSALS PROCEDURE

A. TENTATIVE SCHEDULE OF EVENTS

Event	Date
Release Request for Proposals	March 11, 2020
Questions Submitted to San Diego Community Power via PlanetBids	March 16, 2020
SDCP Posts Response to Questions	March 19, 2020
Proposal Deadline	April 1, 2020
Short Listing and Notification for Interview(s)	April 3, 2020
Interviews (if necessary)	April 8 or 9
Final Selection and Recommendation to Board	Week of April 13
Board Approval	April 23, 2020
Contract Execution	May 1, 2020

B. SUBMISSION OF PROPOSALS

All proposals must be electronically submitted by 5:00 pm (PST) April 1, 2020 to the PlanetBids website: <https://www.planetbids.com/portal/portal.cfm?companyID=17950>

Questions about this RFP must be received by 5:00 pm March 16, 2020 to the PlanetBids website. SDCP staff will post responses to PlanetBids no later than March 19, 2020.

All proposals must be received by the stated date and time above in order to be considered for award. SDCP will not be responsible for and may not accept late proposals due to slow internet connection, or for any other electronic failure (including but not limited to information transmission and internet connectivity failures).

By submitting a proposal, each Proposer certifies that its submission is not the result of collusion or any other activity which would tend to directly or indirectly influence the selection process. The proposal will be used to determine the Proposer's capability of rendering the services to be provided. The failure of a Proposer to comply fully with the instructions in this RFP may eliminate its proposal from further evaluation as determined in the sole discretion of SDCP. SDCP reserves the sole right to evaluate the contents of proposals submitted in response to this RFP and to select a Contractor, if any.

a. Special Procurement Preferences

SDCP has identified the following additional contract preferences which shall receive a 3%-6% bonus out of a 100-point scoring system. If Proposers are interested in receiving a bonus for one or more of the following preferences, please provide pertinent information supporting your request.

San Diego County Preference. SDCP desires to support businesses operating in San Diego County where possible. Businesses in this category are described as those with office(s) located in San Diego County and including at least 25% San Diego County residents under their employment.

Diversity Preference. SDCP desires to support diversity among its contractors and vendors by working with women, minority, disabled veteran, and lesbian, gay, bi-sexual and transgender-owned businesses. Please specify if your business or pertinent subcontracted businesses are owned by a person in one or more of these categories. Please also describe diversity and inclusion goals and/or statistics about your business.

C. PROPOSER EVALUATION

Evaluations will be based upon the information provided in the proposals and such other information requested by SDCP as deemed appropriate by SDCP. Proposals must provide clear, concise information and sufficient detail to enable reviewers/evaluators to evaluate the responsiveness and quality of the proposals to all RFP requirements. Proposals that fail to meet the RFP requirements may be rejected; however, SDCP may waive minor irregularities in proposals if so doing would be in the best interest of SDCP. SDCP reserves the right to request additional information from any/all Proposers as part of the selection process.

Proposals will be evaluated based on the following non-exhaustive factors using a 100-point maximum plus any bonus points that may be awarded.

	BID EVALUATION CRITERIA	POINTS POSSIBLE
1.	Proposer's qualifications and experience	30
2.	Approach to scope of work	35
3.	Additional services not requested but that may offer additional value	10
4.	Cost	25
5.	Bonus points	3-6% of points earned

As reflected in the evaluation criteria, contract award will not be based solely on cost, but on a combination of factors as determined to be in the best interest of SDCP. After evaluating the proposals and any oral interviews, SDCP reserves the right to further negotiate the proposed work and/or method and amount of compensation.

6. **PROPOSAL SUBMISSION REQUIREMENTS**

A. COVER LETTER

The cover letter should be brief (two pages maximum) and provide a short synopsis of the Proposer's approach to completing tasks and delivering project products and services. Describe how the delivery of services will be provided. If a team arrangement is proposed, SDCP will recognize the integrity and validity of Proposer's team provided that:

- The arrangements are clearly identified, and relationships are fully disclosed; **and** a primary (Lead) Proposer is designated who will be responsible for all contract performance.
- The signature of the individual authorized/obligated to commit the Proposer to this project is included.
- In signing proposal, statement that the Proposer agrees that the terms of proposal and the costs as submitted are firm for a period of 120 days from proposal due date, unless otherwise negotiated with SDCP.

The cover letter should also include:

- The RFP number and title
- Name and address of proposing firms and/or individuals
- Phone and email address of sole or lead proposer
- Primary contact person

B. TABLE OF CONTENTS

This section should include a clear identification of the materials by section and page numbers.

C. QUALIFICATIONS AND EXPERIENCE

- 1) Provide a statement of qualifications for your organization, including an organization chart, a statement of the size of firm, a description of services provided by your organization, and a statement of the extent of experience/history providing the services requested by this RFP.
- 2) How many full-time employees (FTEs) do you plan to assign to this project if you are selected?
- 3) How many people in total are employed by your company? Delineate between employees and consultants.
- 4) If applicable, list the professional qualifications for each individual that would be assigned to provide services requested by this RFP, including date and educational institutions of any applicable degrees, additional applicable training, and any professional certifications and/or licensing. In lieu of listing this information, you may submit a resume or curriculum vitae for each such individual if the resume/CV includes all the requested information.
- 5) Ethical vendor practices. SDCP is committed to the highest standards of responsible behavior and integrity in all its business relationships. If applicable, please include information about your company's business practices, environmental track record, and commitment to fair employment practices and compensation.

D. PHILOSOPHY AND SERVICE MODEL

This section describes your philosophy and service model for meeting the services required by this RFP. Relevant considerations include the quality and feasibility of your approach to meeting these needs, the manner in which you plan to provide adequate staffing (including planning for absences and back-up coverage, training, background checks, and staff monitoring, etc.), and equipment or other resources provided by you (if applicable). Keep these considerations in mind as you respond to the following:

- a. Describe how you will fulfill the needs of SDCP described in this RFP. Attach a project plan, if appropriate.

- b. Identify how you will meet all other aspects of the scope of work and related requirements. List any items that you cannot provide.
- c. Describe the measurements/metrics/deliverables/assessments that you will provide on at least an annual basis to SDCP to assess the services you will provide.
- d. Provide information on any other pertinent services, if any, that you will offer that will reduce cost or enhance revenue for SDCP.

E. CUSTOMER SERVICE

- a. How will your services meet the needs of SDCP customers and/or the public?
- b. In the event of a routine problem, who is to be contacted within your organization?
- c. In the event of the identification of a problem by SDCP, its customers, and/or other applicable constituents, describe how you will address such problems and the timeframe for addressing them.

F. CONTRACT TERM, COST ANALYSIS AND BUDGET FOR PRIMARY SERVICES:

- a. Clearly identify proposed options for three-year contract duration with option to extend one year, plus cost information associated with such options.
- b. Provide a detailed explanation for all costs associated with your providing the requested services if you are selected.
- c. Is travel time to SDCP expected to be billable? If so, how will travel time invoices be calculated? Generally, proposals that do not include travel time or expenses are preferred unless the services requested require travel as part of the service.
- d. Include start-up costs if any.

G. QUALITY/PROGRAM EVALUATION

Each program may have specific quality/evaluation issues, below are some examples:

- a. Describe the Quality Improvement plan. The plan should include a description of utilization review, co-occurring capability development, case documentation, peer review, and other issues pertaining to quality improvement mandates and policies.
- b. Describe a contingency emergency plan.
- c. Describe credentialing/licensing.

H. REFERENCES

List at least three business references for which you have recently provided similar services. Include contact names, titles, phone numbers and e-mail addresses for all references provided.

Provide at least three client references, if applicable and appropriate, for whom you have provided more than occasional services. Include names, titles, e- mail addresses and phone numbers for these individuals.

I. ADDITIONAL QUESTIONS

Proposers must provide a response to all of the following questions.

Data Management

1. Has your firm previously received large volumes of energy use data from an investor owned utility (IOU), applied CCA rates, and returned CCA billing data to that IOU? If yes, which IOU(s)?
2. Where are the offices that will handle SDCP's data management needs?
3. How many staff will serve SDCP's data management needs full time? Part time? What is their level of experience?
4. What analytical tools do proposer's staff have to integrate upstream reporting (e.g., to the California ISO and WREGIS) with downstream (customer) program design?

Call Center

5. Where is the call center(s) location that will serve SDCP's customers (or where will it be located)?
6. Will or does your firm own and operate these call centers or are they outsourced?
7. How many call center employees will serve SDCP's customers full-time during start-up? During normal operations?
8. How many will be partially assigned to serving SDCP's customers during start-up? During normal operations?

Staffing and Scale Up

9. How many new CCA or DA customer accounts will your firm begin serving in 2021?
10. How will your organization scale-up to accommodate the increased workload associated with the above-mentioned accounts as well as SDCP?
11. How many additional staff will your organization hire to handle SDCP's needs?
12. What staff member will SDCP's managers reach out to for advice, or with questions and concerns?
13. Provide an assessment of the potential risks and impacts of SDG&E's billing system transition on the ability to deliver the requested services and describe the steps to be taken to mitigate those risks and impacts.

Cyber Security

14. What is the proposer's approach to ensuring security of data systems and platforms, customer information, and other sensitive data?
15. What are the relevant protocols and certifications that the proposer has or uses to ensure cyber security?
16. What types and how often are proposer's cyber security systems audited and by whom?
17. What is proposer's approach or protocol to addressing a breach of proposer's systems or release of sensitive information?

7. SDCP RIGHTS

Any award of a contract resulting from this RFP will be based upon the most responsive Proposal whose offer will be the most advantageous to SDCP in terms of cost, functionality, effectiveness in meeting goals and objectives, and other factors as specified elsewhere in this RFP, as determined solely by SDCP decision makers. SDCP reserves the right to:

- a. Disqualify any and all proposals that are not submitted in accordance with the required format described in this RFP
- b. Reject any and all proposals submitted
- c. Request additional information
- d. Issue Addenda to this RFP, including changes to the requirements
- e. Change due date(s)
- f. Award all, part, or none of the work contemplated in this RFP
- g. Remedy errors in the RFP
- h. Cancel the entire RFP
- i. Issue a subsequent RFP
- j. Approve or reject the use of a particular subcontractor/supplier
- k. Negotiate with any, all or none of the Proposers. If SDCP is unable to negotiate a final contract terms and conditions that are acceptable to SDCP, SDCP reserves the right to award the contract to another Proposer
- l. Accept other than the lowest priced proposal
- m. Award a contract without interviews, discussions or negotiations
- n. Award a contract to one or more Proposers

San Diego Community Power
Cody Hooven, Interim Executive Officer
c/o City of San Diego Sustainability Department
1200 Third Ave. Suite 1800
San Diego, CA 92101

ADDENDUM A
Issued on March 19, 2020

RFP No. 20-001

Closing Date: April 1, 2020
@ 5:00 pm

Request for Proposal for **Data Management Services and Customer Call Center.**

The following changes to the Request for Proposal documents are hereby made effective as though they were originally shown and/or written:

1. *Add* a twenty (20) page “Questions and Answers”. (**Note:** This is for informational purposes only and is not part of any resulting contract.)