

CPUC Energy Efficiency Business Plan Application Development Support Services RFP No. 23-002 Questions & Answers

January 31, 2023

San Diego Community Power (SDCP) received the following questions by the deadline stipulated in the RFP.

Question 1: Will the successful bidder be ineligible to bid on future opportunities to provide implementation services?

Answer: SDCP anticipates the successful bidder will be able to bid on future opportunities to provide implementation services of programs designed and described in the Business Plan Application because SDCP does not intend for the successful bidder to develop the RFP or any other procurement documents related to the implementation services, or to otherwise engage in or advise SDCP on public contracting. Please note that this response is subject to potential future changes in the law which are unforeseen at this time.

Question 2: Can you elaborate on what the scope of work (Scope Item 1 and 3) will entail regarding contractor designing programs?

Answer: Contractor will work with SDCP staff to develop portfolio strategies, program descriptions, intervention strategies, metrics, and savings forecast. The programs designed will be informed by the Community Power Plan (CPP) and the results of contractor's research necessary to identify programs and strategies that meet requirements of the business plan.

Scope of Work items for Tasks 1, 2, 3 and 4 may include but are not limited to the following:

Task 1 Business Plan Development

- Create Business Plan outline (exhibits 1 and 2)¹ and identify other required documents
- Recommend governance and territory structure
- Develop and execute plan to obtain letters of support
- Determine unique value in achieving state goals
- Complete market and needs assessment to determine market sectors
- Gather publicly available data and research to assist with market assessment and decision making

¹ Exhibit 1 is a document to be developed describing the Strategic Business Plan. Exhibit 2 will also need to be developed and will describe the Portfolio Plan. Both documents will be submitted to the CPUC as part of the Business Plan Application. See CPUC decisions for specific Business Plan Application requirements and other PA Business Plan applications for reference.

- Meet with at least 5 community-based organizations (CBOs) and/or recommend and implement other strategies to ensure communities' voices are heard, considered, and incorporated
- Recommend portfolio strategy
- Present initial program ideas in each sector that meet CPUC guidelines, include program segmentation recommendations
- Determine with SDCP which programs to move forward with further detailing
- Determine cost effectiveness using CPUC approved sources, methodology and platforms (i.e., CEDARS, etc.)
- Develop summary for each program to be included in the business plan and which may be used for staff reports or presentations
- Present proposed programs to SD REN stakeholders for feedback
- Finalize proposed programs and overall portfolio cost effectiveness
- Develop style guide and color palette for business plan narrative
- Develop content for each chapter of business plan (exhibits 1 and 2)²
- Develop graphics and visuals to be included in narrative
- Iterate on several draft revisions with SDCP prior to finalizing plan
- Prepare documents for final submittal
- Provide support to SDCP to submit final documents including drafting cover letters, preparing CEDARS outputs or confirmation pages, or communications and any additional documents required to finalize submittal
- Be available to support SDCP to respond to any comments that may arise

Task 2 CPUC ED support

- Identify all required documents to be filed with Business Plan application
- Recommend strategies
- Submit drafts to SDCP
- Participate in recurring and ad hoc meetings pertaining to REN development

Task 3 Data Analysis / Market Analysis

- Complete market and needs assessment to inform business plan
- Develop program metrics, goals, and savings targets
- Calculate cost benefit analysis of proposed portfolio and programs

Task 4 CAEECC Stakeholder support

- Assist with coordination, presentation, and follow-up with CAEECC to present proposed portfolio and programs
- Assist with addressing and incorporating feedback into business plan

² Exhibit 1 is a document to be developed describing the Strategic Business Plan. Exhibit 2 will also need to be developed and will describe the Portfolio Plan. Both documents will be submitted to the CPUC as part of the Business Plan Application. See CPUC decisions for specific Business Plan Application requirements and other PA Business Plan applications for reference.

Question 3: Does SDCP expect contractor will prepare Implementation Plans for recommended programs, and if so would Implementation Plans be filed with the Business Plan or after CPUC approval of the Business Plan?

Answer: Implementation Plans will be filed after CPUC approval of the Business Plan. Contractor support may be needed to finalize Implementation Plans, but SDCP staff resources will be utilized for large part of this work.

Question 4: Does SDCP anticipate it will self-implement the programs in the CPUC-approved Business Plan or will it outsource implementation of the programs to third parties?

Answer: SDCP anticipates it will outsource implementation for majority of selected programs to third parties, although it may choose to implement certain programs.

Question 5: Will contractor have any role or scope beyond CPUC approval of SDCP's Application to become a REN or is the contract expected to end around January 2024 regardless of the status of the CPUC Application review and approval process?

Answer: SDCP anticipates contractor's workload to significantly decrease after the business plan is submitted. SDCP has dedicated staff resources to support this effort including a senior-level staff member with REN administration and implementation experience that will be nearly fully dedicated to the REN formation process. Contractor support may be needed until CPUC approval to support such tasks as responding to any comments that may arise and participating in any stakeholder meetings.

Question 6: Are the support tasks (Scope Items 2 and 4) to be performed during and after submittal of the Application to become a REN, and up to the CPUC approval of the Application, or will they continue beyond the CPUC's approval of the Application?

Answer: SDCP anticipates majority of contractor's work to occur up to business plan submittal and limited support may be needed after submittal and until CPUC approval. See answer 5 for more detail.

Question 7: Do you expect Scope Item 2 to include contractor preparing regulatory and legal filings, including Applications, Pleadings, Comments, Reply Comments, Etc. to the CPUC?

Answer: Yes.

Question 8: To what extent will SDCP personnel be involved in each element of the scope of work?

Answer: SDCP personnel will be involved in each element of the scope of work to collaborate, advise, edit, and review as necessary. SDCP will have a dedicated staff member for the REN formation project throughout the business plan development, submittal, and approval process.

Question 9: What stakeholders will be involved in decision making regarding mix of programs and regulatory strategy and direction?



Answer: At a minimum, SDCP staff with collaboration and advisement from regional partners, the SDCP Community Advisory Committee and the SDCP Board of Directors. The governance structure has yet to be determined for the proposed REN and will influence stakeholders involved in decision making regarding programs and strategy.

Question 10: How is the stakeholder group managed and how are issues brought to consensus or decision?

Answer: Issues and resolutions will be addressed on a case-by-case basis. SDCP will continue to be transparent and utilize the public process and make decisions aligned with its goals, mission, and values. The final governance structure will impact decision making. See answer 9 for more detail.

Question 11: What will be the extent of the contractor's involvement in stakeholder discussions, deliberations and decision making?

Answer: SDCP anticipates the contractor will be involved in stakeholder discussions and may provide recommendations on decision making.

Question 12: Section IV. PROPOSAL SUBMISSION DEADLINE refers to an "online RFP Submissions Form". Can you please provide a link to, or copy of, that form?

Answer: The Response Submissions Form can be found on SDCP's Solicitations page. Link to form [here](#).

Question 13: Do resumes count against the page limit? May they be included in an appendix? (This is referencing the Content and Format of Proposal, Section 4a (iii) – Staffing Resources, Staffing and Key Personnel: "Describe proposed team organization, including identification and responsibilities of key personnel. Please include one- page resumes.")

Answer: Resumes do not count against the page limit and can be include in an appendix.

Question 14: Does SDCP have any type of timeline or milestone date in mind for how soon they want to file their business plan?

Answer: SDCP has drafted an initial timeline that includes filing the business plan by the end of calendar year 2023.

Question 15: Has SDCP conducted any stakeholder outreach to inform the business plan?

Answer: Yes. Community needs and program types identified and recommended through the Community Power Plan (CPP) process will be considered when developing the business plan.

Question 16: Does SDCP have any market sectors in mind already where they want to offer programs?



Answer: Yes, sectors may include but are not limited to residential, public, workforce education and training, and commercial. However, SDCP anticipates the data analysis and market analysis included in this RFP's scope #3 will inform the market sectors that are included in the business plan.

Question 17: Will the Community Power Plan draft be released in advance of the RFP submission deadline?

Answer: Yes, a draft of the Community Power Plan (CPP) is expected to be available early March 2023 for a public comment period. It is expected that a draft of initial strategies will be presented to the Board of Directors in February 2023. The CPP is a high-level 5-year program strategy and will not include in-depth program delivery or design recommendations. Additional effort beyond what has been conducted for the CPP will be required to identify appropriate REN programs.

Question 18: What is the proposed REN service territory?

Answer: At a minimum, SDCP service territory will be the proposed REN service territory. Territory outside of SDCP territory may be included and will be dependent on regional discussions to take place in Q1-Q2 2023 and influenced by the governance structure. See answer 9 for more detail.

Question 19: In "Attachment A related to Scope 3: Data Analysis / Market Analysis" on page 15 – "The Contractor will work with all parties to identify Programs." Could SDCP clarify who is included in "all parties"?

Answer: SDCP anticipates contractor will work closely with SDCP staff to identify all parties necessary to complete the data analysis and market analysis which may include but not limited to SDCP personnel and SDCP identified regional partners (e.g., San Diego Gas & Electric (SDG&E), community-based organizations (CBOs), SDCP's Community Advisory Committee (CAC), SDCP's Board of Directors).

Question 20: Under "Proposal Submission Deadline" on page 3, the RFP references electronically submitting "a single PDF document to SDCP using the online RFP Submissions Form." Could SDCP clarify if the submission is by email or via an alternate platform?

Answer: The submission form can be found on SDCP's website on the solicitation page. Link to form [here](#).

