



**REQUEST FOR PROPOSALS  
FOR  
SAN DIEGO COMMUNITY POWER**

**FOR**

**Distributed Energy Resource Management System (DERMS) Software**

**Date of Issuance: June 10, 2024**

**SUBMITTALS DUE: JULY ~~19~~<sup>19</sup>, 2024 at 5:00 PM Pacific Time (PT)**



**SAN DIEGO  
COMMUNITY  
POWER**

**SAN DIEGO COMMUNITY POWER  
REQUEST FOR PROPOSALS**

**No. [24-004]**

**For Distributed Energy Resource Management System (DERMS) Software**

**I. BACKGROUND AND INTRODUCTION**

San Diego Community Power (“SDCP”) is the default electricity provider for the Cities of Chula Vista, Encinitas, Imperial Beach, La Mesa, National City, and San Diego and the County of San Diego which serves the unincorporated areas. SDCP’s Joint Powers Authority (“JPA”) agreement is the first in California with a goal to achieve 100 percent renewable energy availability and usage by no later than 2035, which is in advance of current State targets. For more information, please visit SDCP’s website.<sup>1</sup> Proposers shall review SDCP’s Procurement Policy<sup>2</sup> and Inclusive and Sustainable Workforce<sup>3</sup> to ensure compliance when drafting proposals.

Through this Request for Proposals (“RFP”), San Diego Community Power (“SDCP”) is seeking proposals from qualified firms<sup>4</sup> to provide a hosted solution for Distributed Energy Resource Management System (DERMS) Software services (“Services”). These Services are sought to support SDCP demand side management programs. SDCP expects the work to commence on or about September 30, 2024, through June 30, 2027, with a go live goal of November 15, 2024.

**II. PROPOSAL SCHEDULE**

The estimated timetable for this RFP is as follows:

<b>Description</b>	<b>Date</b>
Release of RFP	6/10/2024
Deadline for Written Questions	6/17/2024 at 9:00 a.m. PT
Responses to Questions Provided	6/21/2024
<b>Deadline for Proposal Submission</b>	7/ <del>19</del> 3/2024 at 5:00 p.m. PT
Interviews (if necessary)	Week of 7/ <del>29</del> 15/2024
Demonstrations	<del>87/1215/2024</del> – <del>87/2831/2024</del>

<sup>1</sup> [www.sdcommunitypower.org](http://www.sdcommunitypower.org)

<sup>2</sup> [https://sdcommunitypower.org/wp-content/uploads/2022/08/SDCP-Procurement-Policy\\_Adopted\\_2022.07.28.pdf](https://sdcommunitypower.org/wp-content/uploads/2022/08/SDCP-Procurement-Policy_Adopted_2022.07.28.pdf)

<sup>3</sup> [https://sdcommunitypower.org/wp-content/uploads/2022/02/SDCP\\_ISWF-Policy.pdf](https://sdcommunitypower.org/wp-content/uploads/2022/02/SDCP_ISWF-Policy.pdf)

<sup>4</sup> Use of the term “firm” throughout this document shall mean individual proprietorship, partnership, limited liability company, corporation (whether for profit or not-for-profit), joint venture, or other public or private entity duly existing and operating under California law or authorized to do business in California.



Execution of Contract	No later than <u>1011/116/2024</u>
Commencement of Work	No later than <u>109/1413/2024</u>

The above scheduled dates are tentative and SDCP retains the sole discretion to adjust the above schedule. Nothing set forth herein shall be deemed to bind SDCP to award a contract for the above-described Services, and SDCP retains the sole discretion to cancel or modify any part of or all of this RFP at any time.

### III. QUESTIONS AND RESPONSES

Proposers may submit questions regarding this RFP using the online Questions Submissions Form. The question form can be accessed by using the following link: <https://forms.monday.com/forms/1645b815f3ec92c899b29af41f292255?r=use1>

All questions must be received by 9:00 a.m. (Pacific Time) on 6/17/2024. When submitting questions, please specify which section of the RFP you are referencing and quote the language that prompted the question. Questions may address issues or concerns that the evaluation criteria and/or business requirements would unfairly disadvantage Proposer or, due to unclear instructions, may result in SDCP not receiving the best possible responses from Proposer.

SDCP will provide responses to questions on 6/21/2024. SDCP reserves the right to group similar questions when providing answers.

### IV. PROPOSAL SUBMISSION DEADLINE

Proposals should be submitted electronically to SDCP as a single PDF document using the online Proposal Submissions Form, which can be accessed by using the following hyperlink: <https://forms.monday.com/forms/9f084545729d4413c2faa511e0ef3e11?r=use1>.

**The deadline to submit a proposal is 5:00 p.m. (Pacific Time) on July 19, 2024/7/3/2024.** It is the sole responsibility of Proposers to ensure that their proposal is received before the submission deadline. Proposers shall bear all risks associated with delays in delivery. Any proposals received after the scheduled closing date and time for receipt of proposals may not be accepted.

### V. REQUEST FOR PROPOSALS

#### A. Scope of Services

The Services sought under this RFP are set forth in more detail in **Attachment A**, attached hereto and incorporated herein by reference. Notwithstanding the inclusion of such Services in



**Attachment A**, the final scope of Services negotiated between SDCP and the selected Proposer shall be set forth in the Professional Service Agreement (“Agreement”) executed by and between SDCP and the selected Proposer.

## **B. Content and Format of Proposal**

Proposals shall be concise, well organized, and demonstrate qualifications and applicable experience and approach necessary to provide the required scope of contemplated Services. Ideally, proposals should use Calibri 12-point font, be single-spaced with 1-inch margins. Proposals should be submitted in adobe PDF format for narrative sections and Microsoft Excel format for the functional (Attachment C), non-functional (Attachment D) requirements docs, and Pricing Workbook (Attachment E). Proposers should submit their narrative as a single PDF and include the following items shown in this section and in the order listed as a PDF;~~Proposals should be submitted in Adobe PDF format. Proposers should submit their PDF as a single PDF and include the following items shown in this section and in the order listed as a PDF:~~

1. Executive Summary: (No more than 2 pages): Summarize the content of your proposal in a clear and concise manner.
2. Table of Contents: (No more than 1 page)
3. Identification of Proposer: (No more than 1 page)
  - a. Legal name and address of the company.
  - b. Legal form of company (partnership, corporation).
  - c. If company is a wholly owned subsidiary of a “parent company,” identify the “parent company.”
  - d. Name, title, address, and telephone number of the proposed representative to contact concerning the Proposal Submittal.
  - e. California Business License Number
4. Staffing Resources: (No more than 2 pages)
  - a. Staffing and Key Personnel
    - (i) Provide the number of staff to be assigned to perform the Services and the names/discipline/job title of each as well as your firm’s capacity to provide additional personnel as



needed.

- (ii) Identify three (3) people that will be principally responsible for working with SDCP. Indicate the role and responsibility of each individual and their experience providing similar services to those requested. If the Proposer is chosen as a finalist, these principal individuals must attend the interview and in-person presentation.
- (iii) Describe proposed team organization, including identification and responsibilities of key personnel. Please include one-page resumes for the entire proposed team. Please note that proposed team member resumes do not count towards the page total for this section.

b. Subcontractors/Subconsultants

- (i) To the extent that a Proposer lacks specific expertise in any of the areas described in Attachment A, a professional team of subcontractors or associate firms should be assembled by the Proposer to complement their technical expertise. Please include any subcontractors that will support one or more of the service areas described in Attachment A.

5. References

a. Attachment B – References Template

- (i) Provide three (3) references regarding the Proposer’s experience and performance performing similar services. Include the following information: (1) organization name, contact name, phone number, e-mail address; and (2) project size and description, if applicable, and description of services. Please use Attachment B – References Template to complete this section.

6. Project Experience and Technical Competence: (No more than 3 pages)

a. Proposer Experience



- (i) The Proposer shall provide a description of how their experience, technical and professional skills will meet the goals and fulfill the general functions identified in this RFP.
  - (ii) The Proposer shall state the number of years the Proposer has conducted business. Proposer must have at least 3 years of experience in providing the required scope of Services.
  - (iii) Describe the Proposer’s local experience and knowledge of California Community Choice Aggregation (CCA) operations, knowledge of the CAISO market, as well as its experience optimizing DERs around time varying rates and supporting daily load shifting.
- b. Project Specific Experience
- (i) The Proposer shall provide a description of the three most relevant service contracts held by the Proposer within the last five years, one page per project, to include:
    - (a) Role of the firm
    - (b) Dollar value of the services
    - (c) Dollar value of the fee
    - (d) Description of services
    - (e) Staffing
    - (f) Duration of providing services
    - (g) Relationship to client
    - (h) Contact name, position, entity name, telephone number, fax number and e-mail address for each project.
- c. Technical Competence



- (i) Description of in-house resources (i.e., computer capabilities, software applications, security protocols, modeling programs, etc.)
- (ii) Ability to draw upon multi-disciplinary staff to address the Services requested in this RFP.

7. Proposers Approach (no more than 6 pages)

- a. Solution Architecture: Proposers should describe the proposed architecture for meeting SDCP's DERMS Scope of Work (Attachment A).
  - (i) Describe the Proposed DERMS software solution and include a description of how the product has differentiated itself from others in the marketplace.
  - (ii) Explain how Proposer's solution supports capturing of customer information and mapping of that data to tariff attributes. Explain validations which occur to confirm customer participation in the program.
  - (iii) Identify components to be deployed in support of Daily Load Shifting Use Case and those to be added to support additional use cases/functionality.
  - (iv) Provide a diagram of the interfaces expected for SDCP's requirements. Include all data communication and transfer needs to satisfy the requirements. Please reference Attachment F: Architecture Diagram to complete your response to this section.
  - (v) Explain how Proposer's solution automates the various program notifications and what provisions exist for human validation of steps prior to moving to fully automated processes.
  - (vi) Explain how Proposer's solution would provide a daily forecast of customer program and DER availability managed by SDCP to lower overall peak demand.



- (vii) Explain how proposed solution enables test notification and control signals to a resource to ensure connectivity and responsiveness.
- (viii) Describe how Proposer's solution accepts control signals or dispatch schedules from third party systems.
- (ix) Explain how event parameters may be input as part of triggering a workflow, dispatch, or customer notification.
- (x) Explain how business rules are configured in your solution and how those business rules are applied to solution functions.
- (xi) Describe all third-party DER controller system integrations (current and anticipated integrations) for the proposed solution. Please include integrated platforms on your roadmap and describe the supported communication protocols for each integration.
- (xii) Describe how Proposer's user interface enhances a user's ability to make operational decisions based on load forecasts, weather forecasts, real-time DER monitoring, operational parameters, system constraints, program constraints, etc.
- (xiii) Describe Proposer's solution's ability to report customer participation during events including event start, load start, event duration, load during event in real time or near real time, event end, and load ending value.

b. Solution Roadmap

- (i) Proposers should describe the strategic direction and roadmap as it relates to Proposer's DERMS solution(s) identified in Attachment A.
- (ii) Proposers should include specific core features expected in the first 6 months, 1 year, 2 years, etc., highlighting those which align with SDCP's program goals.





- (iii) Proposers should describe the process for incorporating client requests into the Proposed roadmap (please cite specific examples if applicable).

[The following portions of the proposal should be submitted as three separates .xlsx files:](#)

- 8. Functional Requirements:
  - a. Proposers should provide responses to the Functional Requirements document (Attachment C). Please refer to Attachment C for more information on how to complete this section.
- 9. Non-Functional Requirements:
  - a. Proposers should provide responses to the Non-Functional requirements in Attachment D: Non-Functional Requirements Response. Follow the response instructions indicated in Attachment D.
- 10. Pricing:
  - a. Bidder shall provide pricing to implement the proposed solution. Please use the pricing template in Attachment E: Pricing Workbook for the response.

**C. Protests**

1. Protest Contents: Proposer may protest a contract award if the Proposer believes that the award was inconsistent with SDCP policy or this RFP is not in compliance with law. A protest must be filed in writing with SDCP (email is not acceptable) within five (5) business days after receipt of notification of the contract award. Any protest submitted after 5:00 p.m. of the fifth business day after notification of the contract award will be rejected by SDCP as invalid and the Proposer’s failure to timely file a protest will waive the Proposer’s right to protest the contract award. The Proposer’s protest must include supporting documentation, legal authorities in support of the grounds for the protest and the name, address and telephone number of the person representing the Proposer for purposes of the protest. Any matters not set forth in the protest shall be deemed waived.



2. SDCP Review: SDCP will review and evaluate the basis of the protest provided the protest is filed in strict conformity with this section. SDCP shall provide the Proposer submitting the protest with a written statement concurring with or denying the protest. Action by SDCP relative to the protest will be final and not subject to appeal or reconsideration. The procedure and time limits set forth in this Section are mandatory and are the Proposer's sole and exclusive remedy in the event of protest. Failure to comply with these procedures will constitute a waiver of any right to further pursue the protest, including filing a Government Code claim or legal proceedings.

#### **D. Submittal Requirements**

1. General: It is strongly recommended that the Proposer submit proposals in the format identified in Section V(B) to allow SDCP to fully evaluate and compare the proposals. All requirements and questions in the RFP should be addressed and all requested information should be supplied. SDCP reserves the right to request additional information which, in SDCP's opinion, is necessary to assure that the Proposer's competence, qualifications, number of qualified employees, business organization and financial resources are adequate to perform the Services according to the terms of the Agreement.

2. Preparation: Proposals should be prepared in such a way as to provide a straightforward, concise delineation of capabilities to satisfy the requirements of this RFP. Responses should emphasize the Proposer's demonstrated capability to perform work of this type. Expensive bindings and promotional materials, etc., are not necessary or desired. However, technical literature that supports the approach to providing the Services and work plan should be forwarded as part of the proposal. Emphasis should be concentrated on completeness, approach to the work, and clarity of the proposal.

3. Authorization: The proposal shall be signed by an individual, partner, officer or officers authorized to execute legal documents on behalf of the Proposer.

#### **E. Miscellaneous**

1. Exceptions Certification to this RFP: In submitting a proposal in response to this RFP, Proposer is certifying that it takes no exceptions to this RFP including. If any exceptions are taken, such exceptions must be clearly noted in the proposal and may be reason for rejection of the proposal.

2. Amendments to Proposals: No amendment, addendum or modification will be accepted after a proposal has been submitted to SDCP. If a change to a proposal that has



been submitted is desired, the submitted proposal must be withdrawn and the replacement proposal must be submitted to SDCP prior to the proposal due date and time.

3. Price Validity: Prices provided by Proposers in response to this RFP are valid for 90 days from the proposal due date. SDCP intends to award the contract within this time but may request an extension from the Proposers to hold pricing, until negotiations are complete and the contract is awarded.

4. Right to Negotiate and/or Reject Proposals: SDCP reserves the right to negotiate any price or provision, task order or service, accept any part or all of any proposals, waive any irregularities, and to reject any and all, or parts of any and all proposals, whenever, in the sole opinion of SDCP, such action shall serve its best interests and those of SDCP ratepayers. Proposers are encouraged to submit their best prices in their proposals, and SDCP intends to negotiate only with the Proposer(s) whose proposal most closely meets SDCP’s requirements at the lowest estimated cost. The contract award, if any is awarded, will go to the Proposer whose proposal best meets SDCP’s requirements.

5. Prevailing Wages: Proposers shall take cognizance of the requirements of California Labor Code Sections 1720 et seq., as well as California Code of Regulations, Title 8, Section 16000 et seq. (“Prevailing Wage Laws”), which require the payment of prevailing wage rates and the performance of other requirements on certain “public work” and “maintenance” projects. To the extent applicable, the Proposer must agree to fully comply with and to require its subcontractors/subconsultants to fully comply with such Prevailing Wage Laws. If the Services are funded in whole or in part by federal funds or otherwise require compliance with the Davis-Bacon Fair Labor Standards Act, the successful Proposer and all its subcontractors/subconsultants shall pay the higher of the state or federal prevailing wage rates.

**F. Proposal Evaluations & Criteria**

Proposals will be evaluated in accordance with the following evaluation criteria:

	<b>Evaluation Criteria</b>
1.	Proposer’s qualifications and experience, including demonstration of past success
2.	Proposer’s approach to the services ( <b>Attachment A</b> ), including Solution Architecture and Solution Roadmap
3.	Prospective Proposer References ( <b>Attachment B</b> )
4.	Functional ( <b>Attachment C</b> ) and Non-Functional ( <b>Attachment D</b> ) Requirements
5.	Commercial Terms/Price ( <b>Attachment E</b> )



<b>Total</b>
--------------

For a list of bonus points/special preferences, please visit SDCP’s procurement policy [here](#). Following the initial evaluation, SDCP may select one particular Proposer or select a number of Proposers (with or without interviews); or conduct interviews with a “short list” of Proposers, consisting of those Proposers reasonably likely, in the opinion of SDCP, to be awarded the contract. Any interview may include discussions about services offered, conflicts of interests with other clients, or fees/compensation amount or structure. Interviews may take place through written correspondence, telephone or video conference, and/or face-to-face interviews, at SDCP’s sole discretion.

SDCP reserves the right to not convene interviews or discussions, and to make an award on the basis of initial proposals received. References may be contacted at any point in the evaluation process.

After a Proposer(s) has been selected, SDCP will negotiate a contract for execution. If a satisfactory contract cannot be negotiated, SDCP may, at its sole discretion, begin contract negotiations with the next qualified Proposer who submitted a proposal, as determined by SDCP. Proposers are further notified that SDCP may disqualify any Proposer with whom SDCP cannot satisfactorily negotiate a contract.

**VI. RESERVATION OF RIGHTS**

This RFP is a solicitation for proposals only and is not intended as an offer to enter into a contract or as a promise to engage in any formal competitive bidding or negotiations. SDCP may, at its sole discretion, accept or reject any or all proposals submitted in response to this RFP. In addition, SDCP may, at its sole discretion, only elect to proceed with contract negotiations for some of the services included in the proposal. SDCP further reserves the right to cancel this RFP at any time prior to contract award without obligation in any manner for proposal preparation, interview, fee negotiation or other marketing costs associated with this RFP. SDCP also reserves the right to waive minor errors and omissions or inconsequential disparities in proposals, request additional information or revisions to offers, and to negotiate with any or all Proposers.

SDCP shall not be liable for any costs incurred by the Proposer in connection with the preparation and submission of any proposal. SDCP has the right to amend the RFP, in whole or in part, by written addendum, at any time. SDCP is responsible only for that which is expressly stated in the solicitation document and any authorized written addenda. Such addendum shall be made available to each person or organization which SDCP records indicate has received this RFP. Should such addendum require additional information not previously requested, failure to address the requirements of such addendum may result in the proposal being found non-



responsive and not being considered, as determined in the sole discretion of SDCP. SDCP is not responsible for and shall not be bound by any representations otherwise made by any individual acting or purporting to act on its behalf prior to an award of contract by SDCP. SDCP has the right to reissue the RFP at a future date.

## **VII. CONFIDENTIALITY AND PUBLIC RECORDS**

Proposals submitted in response to this RFP shall become the exclusive property of SDCP. SDCP is subject to the California Public Records Act (“CPRA”). The proposal will become a matter of public record when contract negotiations are complete and when an agreement is executed by SDCP. Exceptions to disclosure may be available to those parts or portions of proposals that are justifiably and reasonably exempted under the CPRA, such as trade secrets. If a Proposer desires to exclude a portion of its proposal from disclosure under the California Public Records Act, the Proposer must prominently mark it “confidential” and state the specific provision in the California Public Records Act that provides the exemption as well as the factual basis for claiming the exemption. A blanket statement of confidentiality or the marking of each page of the proposal as confidential shall not be deemed sufficient notice of a CPRA exemption. A Proposer who indiscriminately and without justification identifies most or all of its proposal as exempt from disclosure or submits a redacted copy may be deemed non-responsive.

Although the CPRA recognizes that certain confidential information or other exempt records may be protected from disclosure, SDCP is not in a position to establish that the information that a Proposer submits is exempt. If a request is made for information marked “Confidential,” SDCP will provide Proposers who submitted the information with reasonable notice to seek protection from disclosure by a court of competent jurisdiction.

SDCP shall not, in any way, be liable or responsible for any resulting disclosure of any such record or any parts thereof pursuant to the CPRA or otherwise by law.

## **VIII. CONFLICTS OF INTEREST**

SDCP is governed by the Political Reform Act, Government Code Section 1090, Government Code Section 84308, and other requirements governing conflicts of interest, campaign contributions, and gifts. Proposers are required to review all applicable conflict of interest laws. In addition, SDCP has adopted policies governing procurement. Proposers are advised to review all policies, including the Procurement Policy, available at: <https://sdcommunitypower.org/resources/key-documents/>.

The Proposer may not contact or receive information outside of this RFP process. If it is discovered that the Proposer contacted SDCP and received information outside of the process



specified herein regarding this solicitation, SDCP may, in its sole discretion, disqualify the proposal from further consideration.

All contact regarding this RFP or any matter relating thereto must be submitted using the online questions submissions form: <https://forms.monday.com/forms/1645b815f3ec92c899b29af41f292255?r=use1>.

#### **IX. REPORTING OF SUPPLIER DIVERSITY INFORMATION**

Public Utilities Code Section 366.2(m) requires certain community choice aggregators, including SDCP, to annually submit to the California Public Utility Commission (“CPUC”): (1) a detailed and verifiable plan for increasing procurement from small, local, and diverse business enterprises; and (2) a report regarding its procurement from women, minority, disabled veteran, persons with disabilities, and LGBT business enterprises.

General Order (GO) 156, adopted by the CPUC, requires certain California public utilities to engage in outreach activities and meet specific procurement goals from women, minority, disabled veteran, persons with disabilities, and LGBT business enterprises. Qualified businesses become GO 156 certified through the CPUC and are then added to the GO 156 Supplier Clearinghouse database ([www.thesupplierclearinghouse.com](http://www.thesupplierclearinghouse.com)).

To assist SDCP with its reporting obligations under Public Utilities Code Section 366.2(m) and with evaluating its supplier outreach and other activities, proposers that are awarded the contract will be asked to voluntarily disclose their certification status with the CPUC Clearinghouse, as well as their efforts to work with diverse business enterprises, including women business enterprises (WBEs), minority business enterprises (MBEs), disabled veteran business enterprises (DVBES), and lesbian gay bisexual transgender business enterprises (LGBTBES).

Except as otherwise expressly provided under this Policy and/or required by applicable state or federal law or funding requirements (including, without limitation, any grant or loan conditions), SDCP shall not use any demographic information received from potential vendors in any way as part of its decision-making or selection process. Rather, SDCP will use such information solely for compliance with its reporting obligations to the CPUC and evaluation of SDCP’s outreach and other activities consistent with applicable law. Pursuant to Article I, Section 31 of the California Constitution, SDCP shall not discriminate against or give preferential treatment to any individual or group on the basis of race, sex, color, ethnicity, or national origin except as otherwise allowed therein.

#### **X. NON-DISCRIMINATION**



SDCP will not discriminate and will require its contractors to not discriminate on the basis of race, gender expression, gender identity, religion, national origin, ethnicity, sexual orientation, age, or disability in the solicitation, selection, hiring, or treatment of contractors, subcontractors, vendors, or suppliers. The successful Proposer shall provide equal opportunity for subcontractors to participate in subcontracting opportunities.

## **XI. ATTACHMENTS**

**Attachment A** – Scope of Services

**Attachment B** – Prospective Proposer References

**Attachment C** – Functional Requirements Response

**Attachment D** – Non-Functional Requirements Response

**Attachment E** – Pricing Workbook

**Attachment F** – Architecture Diagram



**ATTACHMENT A  
SCOPE OF SERVICES**



# Table of Contents

TABLE OF CONTENTS.....	ii
1 INTRODUCTION .....	1
2 DERMS FUNCTIONS .....	1
2.1 DER Integration .....	2
2.2 DER Registration.....	2
2.3 Security and Architecture .....	2
2.4 Data Access .....	2
2.5 Optimization.....	2
2.6 Monitoring .....	2
2.7 Forecasting.....	2
2.8 Visualization .....	2
2.9 Control .....	3
2.10 Program Management .....	3
2.11 Constraint Management.....	3
2.12 Communication .....	3
2.13 Reporting & Settlement.....	3
2.14 Markets .....	3
3 BIDDER RESPONSE.....	3

# 1 Introduction

San Diego Community Power (SDCP) provides affordable clean energy to its customers and re-invests in the community to create an equitable and sustainable future for the San Diego region. To support this effort, SDCP is developing a suite of distributed energy resources (DER) programs targeting energy efficiency, electrification, energy storage, and renewable generation. These programs will be designed and delivered to, among other things, maximize the size and value of SDCP's flexible load resource base. Targeting flexibility will enable customer load optimization and deliver direct bill savings to program participants, reduce procurement risks and costs, and enable lower rates for the broader community. Moreover, this approach will align SDCP's efforts with the broader policy goals of the state.

SDCP plans to integrate all DERs deployed through its programs under a single Distributed Energy Resource Management System (DERMS) platform. This platform will unify both residential and commercial customer classes, as well as various DER asset types into a single resource that can be operationalized across a range of use cases. The initial use case for this DERMS deployment is to support daily load shifting, which aims to manage customers' on-peak consumption, to optimize usage around Time-of-Use (TOU) rates, while at the same time reducing SDCP's costs related to wholesale energy and Resource Adequacy (RA) procurement. Over time, the use of the platform will evolve with market opportunities, which may include participating in the California Independent System Operator (CAISO) markets and California Public Utilities Commission (CPUC) supply side programs (e.g., Proxy Demand Response and the Demand Response Auction Mechanism) and/or location-based dispatch of DERs to support a yet to be established Distribution System Operator model.

This Scope of Services is requesting detailed responses from Bidders for their DERMS solution and how the proposed product meets SDCP's DERMS functionality.

## 2 DERMS Functions

SDCP's goal is to identify and deploy a cost-effective solution to meet the use cases and requirements specified for implementation of a DERMS.

Functional DERMS Requirements are grouped into fourteen (14) categories as listed below. Additionally, SDCP requests that Proposers address these DERMS requirements by submitting a completed **Attachment E-Functional Requirements Response (Attachment E)**; Attachment E should be included as part of the RFP response package and completed by the vendor as instructed in the Information and Instructions tab.

Key functional requirements for each category grouping are detailed in the following sections.

- DER Integration
- DER Registration
- Security and Architecture
- Data Access
- Optimization
- Monitoring
- Forecasting
- Visualization
- Control
- Program Management
- Constraint Management
- Communication

- Reporting & Settlements
- Markets

## 2.1 DER Integration

DER Integration is focused on bringing LSE assets into the DERMS system and ensuring that both the assets and the LSE systems are aligned.

## 2.2 DER Registration

DER registration requires that the proposed solution be able to support and maintain information related to the individual DER assets as well as any aggregations of DER assets by type and/or location. This ensures alignment for the operation and dispatch of DERs in support of the proposed SDCP use cases.

## 2.3 Security and Architecture

This section is focused on Bidder's current solution security and structure. Cyber security is a paramount concern when dealing with third party systems and assets directly connected to the grid. This section is to showcase Bidder's security, architecture, and maintenance.

## 2.4 Data Access

Data access focuses on the ability of the DERMS system to provide SDCP with the ability to utilize the system as a system of record for event management.

## 2.5 Optimization

Requirements focused on allowing for the DERMS system to understand and dispatch DER assets on an economic basis. In addition to event-based dispatch, the DERMS shall be able to optimize against a utility rate structure, such as a Time of Use rate, and/or other market-based signals.

## 2.6 Monitoring

The ability for SDCP operations and customer programs groups to monitor customer loads is the focus of this section. The DERMS will need to be able to track DERs and customer loads in real time and is critical for understanding compliance to control signals.

## 2.7 Forecasting

This section is used to enable the DERMS to make operational decisions based on load forecasts, weather forecasts, real-time DER monitoring, operational parameters, system constraints, program constraints, etc. SDCP will utilize the forecasting capabilities of the DERMS to support the dispatch of customer programs and DER assets in support of lowering demand and resource adequacy impacts.

## 2.8 Visualization

SDCP is looking for a DERMS solution that would provide a single screen for understanding any DER asset management. SDCP will utilize this section to identify what DERs or programs may be available and when they have been activated.

## 2.9 Control

The control category covers requirements and capabilities for DERMS to call and manage events, control singular or grouped assets, and alleviate constraints through triggered options or self-optimization.

## 2.10 Program Management

Program Management functionality covers how DER asset, customer, and program information is modeled in the DERMS platform and how customers can be aggregated by program elements.

## 2.11 Constraint Management

Constraint Management functionality is focused on capturing tariff rules and contract terms associated with SDCP's demand side management program designs, tariffs, and interactions with CAISO.

## 2.12 Communication

The communication section is focused on the protocols and methodologies within the DERMS system to be able to dispatch, monitor, and control DERs and customer programs.

## 2.13 Reporting & Settlement

The reporting section focuses on the tracking and reporting of items needed to support customer, SDCP, and CAISO reporting needs.

## 2.14 Markets

Markets is focused on the interactions with the CAISO market and the ability of the DERMS system to support SDCP's interactions and bidding within the CAISO protocols. This section also includes the DERMS ability to integrate with and take dispatch signals from emerging rates databases, such as MIDAS.

# 3 Proposer Response

Proposers shall address the items below by crafting a detailed response and including the information within the RFP package. Responses should not include information that is not relevant to the Proposer's approach to addressing the information requested below.

### Solution Architecture

Describe Proposer's recommended solution architecture for meeting SDCP's DERMS approach. Identify components to be deployed to support the Daily Load Shifting Use Case and those to be added to support additional functionality. Provide an indication of the interfaces expected for SDCP's requirements. Include all data communication and transfer needs to satisfy the requirements.

Refer to **Attachment F: Architecture Diagram** for the systems currently in use at SDCP.

### Solution Roadmap

Describe Proposer's strategic direction and roadmap as it relates to Proposer's DERMS solution(s). Include specific core features expected in the 6 months, 1 year, 2 years...etc., highlighting those which align with SDCP's

program goals. Describe Proposer’s process for incorporating client’s requests into Proposer’s roadmap (please cite specific examples if applicable).

### **Functional Requirements**

As identified above, include all answers to functional requirements in **Attachment C - Functional Requirements Response**. Follow the response instructions indicated in Attachment C.

### **Non-Functional Requirements**

Include answers to all non-functional requirements in **Attachment D: Non-Functional Requirements Response**. Follow the response instructions indicated in Attachment D.

### **Pricing**

Bidder shall provide pricing to implement the proposed solution. Please use the pricing template in **Attachment E: Pricing Workbook** for your response.



**ATTACHMENT B  
PROSPECTIVE PROPOSER REFERENCES**

**Proposer's Name:** \_\_\_\_\_

List three (3) References where the same or similar scope of services were provided in order to meet the Minimum Requirements stated in this solicitation.

<b>1. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> ( )	<b>Fax #</b> ( )
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.
<b>2. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> ( )	<b>Fax #</b> ( )
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.
<b>3. Name of Firm</b>	<b>Address of Firm</b>	<b>Contact Person</b>	<b>Telephone #</b> ( )	<b>Fax #</b> ( )
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.