

#24-003
ETRM RFP
SDCP Responses to Proposer Questions

- 1. Is there a mechanism where we a proser could partner as a sub-contractor with potential bidders?**

Response: SDCP encourages collaborations between bidders in providing a response to this RFP, however we do not provide a mechanism for partnering.

- 2. We do not see a copy of SDCP's standard professional services agreement attached to the RFP. Can you please provide it?**

Response: SDCP is looking to review and negotiate a final contract and starting with the selected proposer's Agreement. SDCP issued an addendum updating its RFP to maintain consistency with the requested requirements of the RFP.

- 3. Will SDCP provide an extension to the 6/17 question deadline?**

Response: Pursuant to the RFP Section VI. (Reservations of Rights), SDCP will not be issuing an extension to the 6/17 question deadline at this time.

- 4. Would SDCP accept proposals from providers of a Virtual End Node, i.e. a monitoring and control platform of a specific class of DERs such as electric vehicles? If not, does SDCP envision incorporating specialized DER aggregators/platforms into its DERMS at a later date?**

Response: SDCP is open to proposals that meet the business need and technical requirements outlined in the RFP, this may include partnerships between top node DERMS providers and virtual end nodes of specific DERs classes. Please note, however, that SDCP is planning a separate procurement for managed charging/V1G services later this year.

- 5. Does "hosted" mean the proposed solution shall cover all costs, including delivery from vendor own infrastructure (cloud subscriptions and costs)? Does it mean pricing must be on a "per use" basis? If both answers are affirmative, are you seeking for a SaaS solution? Please clarify.**

Response: Yes, SDCP is looking for a vendor provided Software as a Service ("SaaS") solution. Proposals submitted to this RFP should include pricing that is inclusive of any and all operational costs including software, licensing, services, API fees, etc.

- 6. 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. Please clarify dates, as go live date seems incorrect.**

Response: SDCP has extended the Deadline for Proposal Submission to 7/19/2024 at 5:00 pm PT, as reflected in Addendum 02, released 6/21/2024. The modified RFP timeline will push back expected commencement of work until late October and go live of the DERMS to late Q4 2024. SDCP's goal remains to begin enrolling assets and testing basic capabilities in calendar year 2024.

7. Will all Q&A be released to all proposers?

Response: SDCP Responses to Proposer's Questions will be provided to all requestors and will be available publicly on SDCP's website at: <https://sdcommunitypower.org/resources/solicitations/>.

8. External Proposals should be submitted electronically to SDCP as a single PDF document. Provided the number of attachments to collect all required information, do you expect everything to be delivered in a single pdf document? Do you like the requirements spreadsheets to be formatted and included in such single pdf document?

Response: Narrative portions of the bids should be submitted as a single PDF document, and the functional (Attachment C), non-functional (Attachment D) requirements docs, and Pricing Workbook (Attachment E) submitted as .xlsx files. An addendum will be released to reflect this change.

9. Staffing and Key Personnel: it is requested to provide names/discipline/job title of staff. Please confirm the interest is on the profile types and the skills required from the proposed profiles, and it is not required to provide individual names, which in any case, shall be non-binding

Response: SDCP seeks to understand the individual resources that would be available to lead and implement the DERMS system, not just skill sets. While there may be changes to resources, SDCP would expect that any adjustments would be a "like for like" replacement in terms of expertise, experience, etc. SDCP is expecting to identify vendor experience in implementing DERMS as a key differentiator. As written in the RFP, Section V.B, subsection 4.a,(iii), describe proposed team organization, including identification and responsibilities of key personnel. Please include one-page resumes for the entire proposed team.

10. Is it required to identify the subcontractors and the agreements set forth with them, or just to identify that there will be some tasks of the service areas in Attachment A, that will be subcontracted?

Response: As with the response to Question 9, SDCP seeks to understand the resources available to implement the DERMS solution. As described in the RFP, Section V.B, subsection 4.b, please include any subcontractors that will support one or more of the service areas described in Attachment A.

11. When speaking of services and fees, do you refer to fees as the licensing costs and services as the rest of project costs?

Response: Yes, bids should include all costs associated with delivering the proposed solution. Please refer to Attachment E: Pricing Workbook for more information about how to identify all costs with delivering the proposed solution.

12. Please clarify proposal format and extension. It is understood that there is no page limit for this section, and that tables of functional and non-functional requirements must be inserted in the single pdf document. Any diagram or image supporting the narrative must be included in the spreadsheet format. Please clarify.

Response: Please refer to the response to Question 8. Functional and non-functional requirements should be submitted as an .xlsx file. Instructions reflecting this change will be provided in the forthcoming Addendum #2. As outlined in the RFP, diagrams and supporting images should be included in the "Proposer's Approach" section of the Proposer's submittal. Please note that Diagrams and supporting images are included in that section's page limit maximum (6 pages total).

13. Are there any aspects of this RFP that include incentive processing and disbursements for end-customers? If so, it would be great to be included as a potential sub-contractor for other vendors to at least be aware of. We offer zero-cost payment methods for end customers and are bespoke to the utility and CCA vertical. We currently work with 250 utility partners.

Response: Incentive processing, distribution, and other program implementation work are beyond the scope of this procurement.

14. Is SDCP open to providing an extension on the proposal deadline of July 3rd given that many people will already have pre-booked holidays for this busy time of year?

Response: Based on bidder feedback, SDCP will be extending the Deadline for Proposal Submission to 7/19/2024 at 5:00 pm PT. This change will be reflected in the forthcoming Addendum #2.

15. Please share details of current (or planned) DSM programs and how they are expected to interact with each other.

- a. Will concurrent events be dispatched across multiple programs?
- b. Can a DER participate in multiple DSM programs at the same time, and how is performance measured?
- c. Do baseline methodologies change for assets in cases when DSM programs may be dispatched for the same resources concurrently?

Response:

- a. Yes, this is likely to occur on high demand days.
- b. Each DER asset class will be enrolled into a specific program, with multiple use cases (e.g., daily load shifting, event-based dispatch, etc.). Programs may switch between use cases, as outlined in the program terms and conditions (T&Cs), based on the needs of

SDCP at any given time. Performance baselining and measurement varies based on asset class and use case.

- c. Programs are asset specific, so baseline methodologies will remain constant within a specific program and asset type.

16. What is the structure of settlements and incentives used as part of existing (and planned) DSM programs?

Response: Incentive design will vary by programs but will generally include both upfront/enrollment and on-going incentives. On-going incentives may be either deemed or performance based, depending on the measure.

17. Please share additional details on downstream head-end systems, in particular around protocols available for interfacing and anticipated data that would flow between the systems.

Response: SDCP is requesting information in the Functional Requirements on supported industry protocols and data requirements. Respondents can use this opportunity to identify the protocols available for use in their DERMS system and what data elements can be available for SDCP.

18. How does SDCP receive reactive power limits/constraints and is SDCP looking for the DERMS platform to disaggregate this across individual sites and DERs?

Response: SDCP will not receive reactive power limits/constraints in the initial implementation of the DERMS, but may in the future if/when a DSO market becomes operational.

19. Please elaborate on the market participation requirements insofar as the different stakeholders and systems involved. As an example, is there presently an ETRM system? What level of decision making and bid optimization lie with a trader versus DERMS platform versus ETRM?

Response: The initial phase of the DERMS rollout will not include a direct connection to SDCP's ETRM system, due to the small, anticipated size of the flex load resource relative to SDCP's overall load. However, SDCP is interested in strategies for how the proposed DERMS solution could support decision making and bid optimization by the Scheduling Coordinator in the future as the size of our flexible load resource base becomes more significant.

20. Please elaborate on EV telematics and how you would expect the DERMS platform to interact with such data.

Response: As referenced in the answer to Question 4, SDCP is planning a separate RFP later this year dedicated to V1G services. This will be a standalone system in the near term but may become a virtual end node of the DERMS as the program evolves.

21. Does “creation of custom forecasting models” relate to DERs and availability forecasting or also to forecasting potential grid/system constraints that may arise based on the performance of the DERs?

Response: The custom forecast models referenced in the RFP relate to DERs and availability forecasting. SDCP is not responsible for distribution operation and this system’s future state role in that function would be limited to responding to resource requests from the DSO.

22. Please share more on the personas and workflows around the technical asset management of assets, particularly FTM.

- a. **What systems and processes does SDCP have in place for FTM assets that are operated and managed by SDCP? What KPIs exist for the performance of these FTM assets?**
- b. **Does SDCP anticipate having third-party operators of FTM assets that are managed by the DERMS platform?**

Response:

- a. SDCP is removing FTM asset integration from the contemplated scope of this solicitation. The change will be reflected in the forthcoming Addendum #2.
- b. SDCP is removing FTM asset integration from the contemplated scope of this solicitation. The change will be reflected in the forthcoming Addendum #2.

23. What are the current (and planned) KPIs for the asset and portfolio reporting as applicable across requirements REP-4 through REP-22?

Response: SDCP is removing FTM asset integration from this solicitation. The change will be reflected in the forthcoming Addendum #2.

24. What are the anticipated criteria for dynamic enrollment of BTM assets within a program?

Response: SDCP plans to enroll customers on a rolling basis, following verification of the participant and equipment eligibility. Bidder should speak to if/how enrollment verification is handled in their platform, the frequency with which new assets can come online, and the data required to implement their solution.

25. What are the present set of local value streams or considerations being optimized beyond just TOU? Is the financial beneficiary of these value streams SDCP, the customer, or some combination thereof?

Response: SDCP’s primary focus for device optimization is participant bill savings through TOU optimization, followed by peak load shedding/shifting to manage Resource Adequacy (RA) costs. As the flex load resource base expands, we may also use the resource to manage around our hedged position and to perform intra-TOU period optimization of load.

26. Does the system need to work within other non-electrical constraints such as thermal requirements or account for dynamic fuel costs in BTM/FTM asset optimization?

Response: No, this is not a requirement.

27. Is SDCP interested in / open to potentially increasing the size of the 'Planned Program Portfolio' that is listed in Attachment E - Pricing Workbook?

- a. **Is SDCP looking for the inclusion of customer asset / endpoint marketing, recruitment, and enrollment services within the scope of services?**
- b. **Does SDCP simply want a forecast of potential enrollments per device / endpoint type for each program year to complement the requested pricing structure based on endpoints / MW with volume breakpoints?**

Response: For purposes of pricing, please use the "Planned Program Portfolio" scenario outlined in Attachment E. Pricing for larger deployments of assets/endpoints can be captured in the "Additional Programs Breakpoint Pricing" table.

- a. SDCP is not specifically seeking proposals to cover marketing, recruitment, and enrollment services in this procurement; however, bidder can provide information and pricing on these services in the "Additional Costs" tab.
- b. Pricing for "Licensing" (Row 24) should reflect the enrollment scenario provided by SDCP and the Breakpoint Pricing provided by the bidder. Pricing for volumes higher than the provided scenario should be reflected in the Breakpoint Pricing table.

28. "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."

- a. **Apart from the information in the Introduction, could you elaborate on SDCP's program goals?**

Response: As stated in Attachment A, SDCP's overall portfolio goal is to develop a flexible load resource base that can be used to 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. Individual programs within the broader portfolio may have additional goals, but these are not relevant to services requested through this RFP.

29. "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."

- a. **We understand that the Solar Battery Savings Program is launching in July. What is the connection between that program and the DERMS Software services? Will the participating ESS be required to connect into the DERMS and if yes by when? From the SDCP SBSP Program Guidelines this was not clear to us.**
- b. **Could you explain when the underlying customer programs (ESS / SBSP, tstat, HPWH) are going live and are to be connected into the DERMS?**
- c. **What are the plans for programs and expected asset volumes for the C&I segment?**

Response:

- a. SDCP plans to begin migrating Solar Battery Savings Program (SBSP) assets into the DERMS in 2025. Specific requirements around this transition and the exact timing are still under review, but SDCP's goal is to migrate most, if not all, ESS systems into the DERMS by the end of 2026.
- b. The SBSP program is planned to go live in summer 2024, with assets migrating over to the DERMS as outlined in the previous answer. SDCP is also planning the launch of a bring your own device (BYOD) program in later 2024/early 2025. The BYOD program will be open to thermostat and water heaters, both of which will be connected to the DERMS at program launch.
- c. SDCP is currently developing plans related to load flexibility in the C&I segment and will likely offer a program in conjunction with the commercial energy efficiency programs expected to launch after California Public Utilities Commission (CPUC) approval of the San Diego Regional Energy Network.

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- a. **What are the weighting factors of the individual evaluation criteria?**

Response: SDCP is not releasing the criteria weighting

31. "DER Integration is focused on bringing LSE assets into the DERMS system and ensuring that both the assets and the LSE systems are aligned." (RFP Doc, Para 2.1)

- a. **Are "LSE assets" SDCP-owned or end customer DERs or both? If SDCP assets, what specific assets?**

Response: This includes BTM customer assets, such as water heaters thermostats, and storage in the near term and may expand in the longer term to include additional customer owned asset classes (e.g., commercial building management systems). No SDCP-owned or FTM asset integrations will be integrated into the DERMS solution.

32. "To ensure existing utility assets can be included in the DERMS" Attachment C "FTM" / "BTM"

- a. **Are existing utility assets referring to assets owned by SDCP?**
- b. **What kind of existing utility assets are to be connected to the DERMS?**
- c. **Can you give examples of FTM vs. BTM assets (types) that will be connected to the DERMS?**

Response: SDCP is removing FTM and SDCP-owned asset integration from the contemplated scope of this solicitation. The change will be reflected in the forthcoming Addendum #2.

33. Attachment A s. 2.7 "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." Attachment C Forecast

- a. **How far ahead do the forecasts need to be to be useful for SDCP's utilization?**

Response: Forecast of DER performance should be available for day ahead

34. Attachment C OPT-6: “DERMS shall display optimization changes within an event (compensation for non-performing DERs)”.

- a. Does this have to be shown live during the event, or after the fact?**

Response: The DERMS should show both real time changes in load to ensure that the portfolio level outcomes are being met, as well as post-event reporting to understand which resources contributed to the overall portfolio performance.

35. Attachment C VIZ-1 “DERMS shall support user role based access around programs and their associated data”...“This data field supports DER advanced inverter functionality”

- a. Is this use case description correct? User role based access does not seem directly related to how the DERMS should support advanced inverter functionality.**

Response: The use case was transcribed in error. WSDCP is looking for role-based access to ensure business process and human performance issues can be addressed.

36. Attachment C Markets section: DERMS shall support multiple use cases related to CAISO market participation (e.g. day ahead and Real-time market bidding, ancillary services participation).

- a. It's not clear whether “support” implies DERMS is expected to be the market participant (e.g. the Scheduling Coordinator) or whether DERMS is expected to support another market participant. Which is intended?**

Response: The DERMS would be the dispatch engine for the SDCP assets and would be dispatching assets based on CAISO market signals, peak demand, etc. The DERMS will not function as a direct market participant.

37. Attachment C “ADMS grid support”

- a. What ADMS are the specifications referring to? The DSO ADMS/DERMS? In the Architecture Diagram the connection with the DSO DERMS is grayed out as an optional. Please advise what functionality is part of the RFP requirements.**

Response: Future SDCP use cases and operational needs may require the DERMS to interact with a DSO model. SDCP is looking for the functionality of the DERMS to support such a future.

38. EV charger curtailment, and generator start up are mentioned in Attachment C, but are not outlined in Attachment F. Which is correct?

Response: These assets were included in Attachment C to understand overall system capabilities. They are not planned for inclusion in near-term program development.