

**Request for Proposals (“RFP”) for an Enterprise Data Platform (“EDP”)
SD Community Power Responses to Proposer Questions**

- 1. Is SD Community Power’s intent with this request to award a single provider of traditional statement of work (SOW) services (i.e., the provider’s internal resources manage and complete the work for the enterprise data platform project)?**

Response: Section V.E states, "The contract award, if any is awarded, will go to the proposer whose proposal best meets SD Community Power’s requirements." SD Community Power intends to award the contract to a single proposer.

- 2. Is SD Community Power open to a managed services solution in which the awarded provider manages a team of sourced experts with profound experience managing and completing enterprise data platform project work?**

Response: Section V.B states, for proposers to provide a "... description of the proposed solution that addresses the capabilities and tasks in Attachment A and the team that will support the implementation." SD Community Power will consider proposals with a managed services solution approach to the work.

- 3. Does SD Community Power prefer fixed bid pricing?**

Response: SD Community Power is open to receiving proposals with fixed pricing, a flat fee payment structure, or a time and material compensation structure.

- 4. Is SD Community Power open to a competitive time and materials pricing model?**

Response: SD Community Power is open to receiving proposals with a fixed price, flat fee, or time and material compensation structure.

- 5. Who are SD Community Power's current partner providers for project-based work?**

Response: SD Community Power uses a variety of providers for projects. SD Community Power regularly posts solicitations to its website for project-based work. For more information on selected vendors for project-based work, please see the SD Community Power monthly board agendas located here: <https://sdcommunitypower.org/resources/meeting-notes/>

- 6. Does SD Community Power have an estimated budget in place for this opportunity? If yes, what is it?**

Response: SD Community Power’s Fiscal Year 2025-2029 Capital Investment Plan states that the budgeted amount is \$850,000 for this project. This amount includes operational costs. An additional budget has been allocated for this project for subsequent fiscal years.

- 7. Is SD Community Power open to adjusting the schedule to allow more time for Proposers to prepare their Proposals after reviewing SD Community Power’s responses to received questions?**

Response: SD Community Power is not currently considering adjusting the schedule. SD Community Power encourages proposers to complete their proposal submission in accordance with the RFP timeline in Section II (Proposal Schedule).

- 8. Please share your evaluation process moving forward. For example, who are the key decision makers at this and future stages? How are sections weighted against one another?**

Response: All submittals deemed responsive will be evaluated in accordance with the following evaluation criteria shown in the RFP, under Section V.F.

- 9. Are the 960,000 customer accounts data need to be integrated in the enterprise data platform from day 1 of first release or SD Community Power is looking for plan to onboard these customers in a phased manner?**

Response: The RFP states that “SD Community Power began service in 2021 and completed enrolling customers in 2024. This enrollment covered approximately 960,000 customer accounts.” SD Community Power expects that the data from these accounts should be integrated into the platform on day one.

Further, the RFP, Section I (Background and Introduction), explains that Data Manager’s role “Maintains the Customer Relationship Management (CRM) system for interacting with SD Community Power’s customers through the Contact Center and is the original source of CRM data and service options and programs.” The customers are already enrolled in the data manager systems. For more information, please review RFP Attachment A.

- 10. Is the number of users after readiness of enterprise data platform factored?**

Response: Based on current hiring plans, the 50 business users is the approximate estimate for the current state and should be substantially similar to when the project is complete.

- 11. Who are Data Consumers other than Business, IT and Operations head? What are other key roles who would be accessing reports**

Response: In addition to the categories mentioned, data consumers may be other vendors that work with SD Community Power.

12. Are there any Specific Master data management requirements? Attachment A currently does not mention it.

Response: SD Community Power does not consider master data management to be part of the scope of this project.

13. Are there any Specific meta data management and Data Catalog requirements? Attachment A currently does not mention it.

Response: The list of Contemplated Capabilities and Contemplated tasks in Attachment A is not exhaustive. San Diego Community Power is open to receiving proposals that include meta data management and data cataloging. SD Community Power does not have specific requirements for these, but if this is a capability that the Contractor can offer in addition to the Contemplated Scope of Services requested, then please include and provide separate pricing (if applicable).

14. Are there any specific Data retention, archival and retrieval requirements?

Response: Specific requirements will be negotiated with the selected proposer.

Relevant record retention policies approved by the SD Community Power Board of Directors can be found on the SD Community Power website at: <https://sdcommunitypower.org/wp-content/uploads/2020/12/00.-Updated-Agenda-Packet-2.pdf>

The selected proposer would need to adhere to the following sections of SD Community Power's Records Retention Policy, beginning on Page 52. Additionally, SD Community Power's Records Retention Schedule begins on Page 60. Please also note the "Utility Services" Category of Record items on Page 84 and 85.

Additionally, Proposers should review SD Community Power's Information Technology and Security Policy, which begins on page 91. The selected proposer would be expected to review this policy.

15. Page 16-Platform development and deployment. Integrate with data analysis or visualization tools such as PowerBI, Tableau, and Looker to allow SD Community Power users to create their own visualizations and reports. Are their specific flagging requirements on Data anomaly detection, Outliers and Data mismatch across Data sources? SMS, Push notification is part of scope or Raising event and Flagging alerts in Data Quality and Data Monitoring reports will meet requirements?

Response: Specific flagging requirements in source data and analytics will be negotiated with the selected proposer. SD Community Power will work with the selected proposer to establish additional data quality checks on this and other Data Feeds.

16. From KPI tracking requirements it looks like there would be 12-15 reports that need to be developed for business users, is this list illustrative or exhaustive?

Response: The list provided in Attachment A is illustrative. A final list of KPI tracking requirements will be negotiated with the selected proposer.

17. Page 18. Data Monitoring and Outlier Detection. Are their specific flagging requirements on Data anomaly detection, Outliers and Data mismatch across Data sources? SMS, Push notification is part of scope or Raising event and Flagging alerts in Data Quality and Data Monitoring reports will meet requirements?

Response: See response to Question 15 above.

18. Should we assume secondary use cases are low in priority compared to other requirements and can be delivered at later stage?

Response: From Attachment A Contemplated Tasks 3 and 4, "The Contractor will be developing analytics, reports and dashboards for the Primary Use Cases." The Contractor will work with SD Community Power to enable SD Community Power to complete those Secondary Use Cases.

There may be several reasons the Secondary Use Cases were listed separated. The Secondary tasks may be complex such that not all proposers may have experience, or SD Community Power may not yet have data sources in place, or SD Community Power may have a pending or future implementation with a vendor after the issue date of the Enterprise Data Platform RFP.

19. 4 data sources in RFP: Data Manager, IOU, SD community Power, 3rd Party Subscription, other 4 should we assume external data sources such as 3rd party (Weather, Power Market) and Scheduling Vendor, are there any other data sources that would be in scope ?

Response: The other external data sources may be vendors with small datasets, new vendors, or alternates to existing data sources. They could include weather, scheduling, pricing, power market, customer demographic, geographic, or other data.

20. For Data Ingestion is there any roadmap like 8-10 data sources mention in RFP, can we know what data feeds are must for first phase of the project/MVP, if there is any priority

Response: Data ingestion priority will be determined with the selected proposer.

21. Are there any specific outlier detection methods or algorithms preferred? How should outliers be flagged and reported?

Response: There are no specific methods or algorithms preferred. SD Community Power is looking for the Contractor to recommend these, and a method for flagging and reporting. See Question 15 for more information.

22. How should invalid or non-standardizable addresses be handled?

Response: The requirements will be negotiated with the selected proposer.

23. Page 18 - Primary Use-Cases. What business rules are currently in place for identifying outliers?

Response: Please note - Primary Use Cases do not include an item for Weather Forecasting. Weather forecasts will be provided by an external data source. There are no current business rules to identify weather forecast outliers.

24. Page 18 - Primary Use-Cases. Weather Scenarios. Will the vendor provide forecasted weather data? What other 3rd party data sources will be provided for forecasting purpose?

Response: Weather forecasts will be provided by an external data source. SD Community Power is open to recommendations for alternate sources for weather forecast data.

25. Page 18 - Primary Use-Cases. Weather Scenarios. Have scenarios for different weather conditions already been defined?

Response: Weather scenarios have not been defined. Similar to Attachment A Primary Use Cases item 10, the intent is to simulate load under different temperatures.

26. Page 18 - Primary Use-Cases. Long Term Load Forecasting. What specific weather parameters are being considered? Please list all relevant factors, such as temperature, humidity, wind speed, precipitation, and any others that will be included in the analysis

Response: Long Term Load Forecasting is a Secondary Use Case and final requirements will be negotiated with the selected proposer.

27. In the context of Long term load forecasting, how is long-term defined? Does it refer to quarterly, half yearly, or any other specific time frame?

Response: Long Term Load Forecasting is a Secondary Use Case and final requirements will be negotiated with the selected proposer. This could refer to load on a monthly basis for next 10 years.

28. Will price levels need to be forecasted as part of the solution, or will this information be available?

Response: Price levels will not need to be provided by this solution.

29. Do the security logs / alerts from this platform need to be forwarded to SD Community Power's existing SIEM & the incidents will be monitored by the existing soc, or do we deploy a new SIEM / soc services for this platform?

Response: The selected contractor will be expected build to a new SOC service for the platform. An in-house security team will monitor and track security logs.

30. Can you provide more specific details about the expected data growth rate over time? This will help ensure that the proposed architecture can scale effectively. We assume pricing engine, requirements of price levels will be provided by SD Community Power power tariff team.

Response: The current illustrative data volumes can be found Attachment A under Data Sources. The Ongoing Daily Volumes could grow 20-30% in the first year, due to enhancements to existing Data Feeds, additional data points or granularity within Data Feeds, or using the existing Data Feeds to their full potential. SD Community Power completed mass enrollment by April 2024 and customer enrollment should be relatively stable going forward.

31. What are the specific challenges anticipated with the external vendor data sources? Are there any specific formats or proprietary systems that require special handling?

Response: When working with external data sources, the Contractor should be able to handle a variety of authentication methods, API connections, and systems. The data formats are listed in the Data Sources in Attachment A. Any specific formats or proprietary systems that require special handling will be discussed with the selected proposer.

32. Are there any additional security or compliance requirements beyond those mentioned (e.g., CCPA, GDPR) that the platform needs to adhere to?

Response: SD Community Power is subject to California Public Utilities Commission Decision 12-08-045 (Attachment B), and has an Advanced Metering Infrastructure (AMI) Data Security and Privacy policy. The selected proposer would need to adhere to both the CPUC Decision and SD Community Power's AMI Data Security and Privacy policy.

SD Community Power's AMI Data Security and Privacy policy, which is approved by the SD Community Power Board of Directors can be found on the SD Community Power website starting on Page 106: <https://sdcommunitypower.org/wp-content/uploads/2020/12/00.-Updated-Agenda-Packet-2.pdf>

Please also refer to SD Community Power's response to Question 14 for more information.

33. What level of training and documentation is expected for SD Community Power staff post-implementation? Will there be a need for ongoing support after the initial launch?

Response: Training and documentation should satisfy Attachment A, Contemplated Capabilities: "Can be operated and managed fully by SD Community Power after completion of build"

This should be based on the staff and skills necessary to operate typical platform of that size and scope, as deemed by the Contractor. Section V.B.4.c states, "Provide an estimate of the operational staff required to fully operate and manage the platform. Include roles, skills, and experience."

There will not be ongoing support after completion of the solution. Consistent with industry standards, transition support after delivery of the solution is expected. Attachment A Contemplated Capabilities states that the solution "Can be operated and managed fully by SD Community Power after completion of build". Proposers should address this item in their Proposed Approach Narrative.

34. It has been mentioned integrating with tools like Tableau and PowerBI. Are there any specific preferences or limitations regarding these tools, or would you consider alternatives?

Response: SD Community Power uses PowerBI in daily operations and would consider alternative tools.

35. Could you clarify the budget constraints or expectations regarding the operational costs, particularly concerning cloud resources and licensing fees?

Response: As a public, not-for-profit agency, SD Community Power is looking for a partner who can clearly provide reasonable operational costs of the platform including any licensing, resources and cloud usage. SD Community Power staff would like to run the platform in a cost-effective way and with a lean team.

Please see Question 6 for more information about budget, which is inclusive of operational costs, cloud resources and licensing fees.

36. For the long-term load forecasting, are there any specific models or methods that SD Community Power prefers or currently uses?

Response: There are no specific models that SD Community Power prefers, and current models are provided by external vendors.

37. Are you open to look into some of new tech stacks to handle the expectations in more meaningful ways?

Response: SD Community Power is open to new tech stacks.

38. Could you provide more clarity on how old the historical data is? Understanding this will be critical for us to ensure that any predictive models we build have sufficient data to be trained on effectively.

Response: Historic data goes back to 2018.

39. Is there a preferred tech stack or cloud server infrastructure that your team is inclined toward, or would you be open to suggestions?

Response: SD Community Power is open to a tech stack or cloud server infrastructure that meets the needs of this project. SD Community Power has more experience with GCP and AWS.

40. Regarding the compliance requirement mentioned in the RFP, could you please specify which internal and external policies we need to adhere to? This will help us ensure full compliance from the beginning of the development process.

Response: Please refer to SD Community Power's response to Question 14 and Question 32 for information on how to access SD Community Power's Retention Policy, SD Community Power's Information Technology and Security Policy, the California Public Utilities Commission Decision 12-08-045 (Attachment B), and SD Community Power's Advanced Metering Infrastructure (AMI) Data Security and Privacy policy.

41. You have mentioned integrating with data analysis and visualization tools such as PowerBI, Tableau, and Looker. Are there any existing visualizations and reports within these platforms that SD Community Power users currently use, or will we be expected to create these visualizations from scratch for your team?

Response: The RFP Section I. Current State explains that "The selected Proposer's approach to the scope of this RFP should entail development of a new data platform setup from the ground up, with no expected migration of any existing internal platform needed"

SD Community Power can provide reports and visualizations to the selected proposer that can be used as examples.

42. In Attachment A, Section #3 refers to "developing customizable analytics." Will this be an ongoing relationship? Do you have a list of customizable analytics needed in the near to long term?

Response: There will not be ongoing support after completion of the solution. Consistent with industry standards, transition support after delivery of the solution is expected. Attachment A Contemplated Capabilities states that the solution "Can be operated and managed fully by SD Community Power after completion of build". Proposers should address this item in their Proposed Approach Narrative.

The analytics are listed in the Primary and Secondary Use Cases in Attachment A. By "customizable analytics", SD Community Power means that any data pipelines, models, reports or dashboards should be able to be modified or customized by SD Community Power developers.

- 43. Will SD Community Power/Data Manager own the integrations for the data feeds from the Data Manager into the proposed platform? Our company has defined data intake schemas for various data feeds. Can SD Community Power/Data Manager conform the data to these defined standard intakes?**

Response: We expect the proposer to build the schemas, pipelines and integrations. Current data intake and schemas are defined by the external Data Manager.

- 44. Would you be interested in a vendor relationship in which the vendor maintains responsibility for the infrastructure and the software platform, either for both use cases or exclusively for secondary use cases? Provided there was flexibility and SD Community Power adaptability in reporting in line with the scope of the RFP**

Response: In Section I Background and Introduction in SD Community Power's Expectations:

"After the contracted support period, SD Community Power should have independence and control of the entire environment without reliance on the contractor for the ongoing licensing and support costs."

- 45. Is it possible to share who is the vendor for the Data Manager? Is that vendor permitted to bid for this enterprise data platform?**

Response: Calpine Energy Solutions, LLC was approved by the Board of Directors as the Data Management/Call Center Services vendor. The Enterprise Data Platform RFP is open to all eligible applicants.

- 46. Will SD Community Power allow multiple vendors to bid together (e.g. Data ETL vendor separate to Data visualization/analytics vendor), or looking for a single vendor to deliver all capabilities?**

Response: RFP Section V.B.2 states, "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." As such, SD Community Power will accept joint proposals to deliver all of the contemplated capabilities.

47. The RFP mentions SD Community Power expects 2-5 developers, please clarify whether they are in-house SD Community Power developers and what their role will be in relation to this RFP.

Response: This refers to the current SD Community Power staff or expected staff at time of the targeted commencement of work. These are Data Engineers, Data Scientists, Report Developers or similar roles. In the beginning, they will be providing requirements, documentation, and visions for the platform, and later learning and training in order to take over operation of the platform after the solution is built.

Please note: Section V.B.4.c states. "Provide an estimate of the operational staff required to fully operate and manage the platform. Include roles, skills, and experience." This should be based on the staff and skills necessary to operate typical platform of that size and scope, as deemed by the Contractor. This estimate is meant to help SD Community Power assess staffing and skills needed to support the platform after completion.

48. We believe that we can bring very high value using all-shore capabilities served across North American and LATAM areas. Is this RFP eligible to have outside US employees or partners working on this project?

Response: SD Community Power will accept proposals that include firms with non-US employees or non-US partners working on this project. SD Community Power will assess every received Proposal against the evaluation criteria found in RFP Section V.F (Proposal Evaluations & Criteria).

Please note that any Proposals submitted in response to this RFP are subject to the terms and conditions outlined in the RFP, applicable federal law, applicable California Law, and must be authorized to do business in California.

49. In response to question 6 in the response document, it has been mentioned that the budgeted amount is \$850,000 for this project. This amount includes operational costs. Does your operation cost include cloud usage/license costs only or does it include SDCP people cost also assigned to this project?

Response: SD Community Power staff costs are not included in the budget referenced in the question 6, above.

50. Will SDCP consider an extension for proposals?

Response: SD Community Power has received a request to extend the proposal due date. SD Community Power is accepting the request to extend the proposal deadline and will extend the deadline to September 30, 2024 at 5:00 PM PT. SD Community Power will issue an addendum to reflect the revised proposal deadline.