



REQUEST FOR PROPOSALS

FOR

SAN DIEGO COMMUNITY POWER

FOR

**Customer Center and Data Management (CCDM)
Professional Services**

Date of Issuance: November 05, 2024

[Addendum #1 Issued: November 21, 2024](#)

Submittals Due:

December 02, 2024 at 5:00 PM Pacific Time (PT)

No. 24-011



**SAN DIEGO COMMUNITY POWER
CUSTOMER CENTER AND DATA MANAGEMENT RFP**

I. BACKGROUND AND INTRODUCTION

San Diego Community Power (“SD Community Power”), a Joint Powers Authority, is the default electricity provider for the cities of Chula Vista, Encinitas, Imperial Beach, La Mesa, National City, San Diego and the County of San Diego’s unincorporated areas (collectively, “member agencies”). SD Community Power’s Joint Powers Agreement (“JPA”) is the first in California with the objective to achieve and sustain 100 percent renewable energy availability and usage by 2035, which is in advance of current State targets. SD Community Power began service in 2021 and completed enrolling customers in 2024. This enrollment covered approximately 960,000 customer accounts. For more information, please visit SD Community Power’s website.¹ Proposers shall review SD Community Power’s Procurement Policy² and Inclusive and Sustainable Workforce Policy³ to ensure compliance when drafting proposals.

Through this RFP, SD Community Power is seeking proposals from qualified individuals or firms⁴ to provide professional services for Customer Center and Data Management Services (“Services”). These services are sought to deliver trusted, reliable and seamless experience in a manner that maximizes the quality of services while also maximizing value to SD Community Power and, by extension, our esteemed customers.

Proposers must be able to show that they are capable of performing the services requested. In order to qualify for consideration, respondents must at a minimum have experience providing the services sought in this RFP within the State of California, either for Investor-Owned Utilities (IOUs), Publicly Owned Utilities (POUs), Electric Service Providers (ESPs), or Community Choice Aggregators (CCAs).

Respondents may submit proposals where some of the services are provided by sub-contractors. However, SD Community Power will only consider packaged responses that meet all of the required functionality and contemplated scope of services outlined in Attachment A.

¹ www.sdcommunitypower.org

² https://sdcommunitypower.org/wp-content/uploads/2022/08/SDCP-Procurement-Policy_Adopted_2022.07.28.pdf

³ https://sdcommunitypower.org/wp-content/uploads/2022/02/SDCP_ISWF-Policy.pdf

⁴ 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.



SD Community Power will not accept responses to only some of the requirements, nor will it accept responses from sub-contractors.

II. PROPOSAL SCHEDULE

The estimated timetable for this RFP is as follows:

Description	Date
Release of RFP	November 05, 2024
Deadline for Written Questions	November 15, 2024, at 5:00 PM-Pacific Time(PT)
Responses to Questions Provided	November 20, 2024
Proposals Due	December 02, 2024, at 5:00 PM PT
Interviews	December 18 - 20, 2024
Execution of Contract	No later than February 28, 2025
Expected Commencement of Work	No later than May 01, 2025

The above scheduled dates are tentative and SD Community Power retains the sole discretion to adjust the above schedule. Nothing set forth herein shall be deemed to bind SD Community Power to award a contract for the above-described Services, and SD Community Power 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 hyperlink: <https://forms.monday.com/forms/cc68c2cdfd241773578abb2512bd5137?r=use1>.

All questions must be received by 5:00 PM PT on November 15, 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 SD Community Power not receiving the best possible responses from Proposer.

SD Community Power will provide responses to questions on November 20, 2024. SD Community Power reserves the right to group similar questions when providing answers.



IV. PROPOSAL SUBMISSION DEADLINE

Proposals should be submitted electronically to SD Community Power as a single PDF document using the online Proposal Submission Form by December 02, 2024. The Proposal Submission Form can be accessed by using the following hyperlink:

<https://forms.monday.com/forms/e1a573a46c8b3ef732e43da8696e7d32?r=use1>.

It is the sole responsibility of the Proposer to ensure that the 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. Contemplated 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 SD Community Power and the successful Proposer shall be set forth in the Professional Service Agreement (“Agreement”) executed by and between SD Community Power and the successful Proposer. A copy of the Agreement is attached hereto as **Attachment C**. SD Community Power expects the initial contract term for this work to be three (3) years. SD Community Power reserves the right to contract for up to two additional one-year extensions for these services and, at that time, may renegotiate the scope of services and associated costs with the successful vendor, which may include a reduction in scope of services and associated changes in costs.

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. An **Attachment D** (Proposal Checklist) has been included in this RFP package to assist Proposers with preparing and submitting a complete proposal. Ideally, proposals should use Calibri 12-point font, be single-spaced with 1-inch margins. SD Community Power is also including an **Attachment E** (SD Community Power Roadmap and Vision for the Future) that articulates a high level internal roadmap for data technology and analytics that ultimately calls for bringing all Customer Relationship Management (CRM) functions in-house under an enterprise-wide CRM that is licensed and maintained by SD Community Power in the coming 3 years. SD Community Power



will look to take the first step on this roadmap by initiating the scope of development and configuration of a standalone SD Community Power CRM in Fiscal Year 2025 that runs from July 01, 2024, through June 30, 2025. Ultimately, SD Community Power envisions its enterprise-wide CRM will be integrated with the Contact Center and Data Management functions articulated in this RFP. Proposals should be submitted in Adobe PDF format and should factor in, take into account, and address the indicative roadmap in **Attachment E** (SD Community Power Roadmap and Vision for the Future) as part of the narrative in terms of how the proposers' will look to address and meet SD Community Power's needs related to not only current state but also its vision for the future as part of their response to this RFP.

Proposers should submit their [Proposal PDF](#) as a single PDF [with the exception of any proposed modifications to Attachment C, which may be submitted along with the Proposal as a separate Word document. The Proposer's submission should](#) and include the following items shown in this section and in the order listed as a PDF:

- 1. Cover Letter⁵ (No more than 2 pages):**
 - a. Legal name and address of the company or companies and/or any applicable sub-contractor(s).
 - b. An executive summary explaining the content of your proposal in a clear and concise manner.
 - c. Legal form of company or companies (partnership, corporation).
 - d. If company is a wholly owned subsidiary of a "parent company," identify the "parent company."
 - e. Name, title, address and telephone number of the proposed representative to contact concerning the Proposal Submittal.
 - f. California Business License Number.

2. Experience & Qualifications Narrative (No more than eight pages): For the project scope period, please provide a narrative that addresses the following:

- a. A description of your team's qualifications to provide the Scope of Services in Attachment A. The qualifications & key personnel should speak to relevant experience with the California Community Choice Aggregation ("CCA") or energy regulatory landscape or utility experience.

⁵ The Cover Letter shall be signed by an individual, partner, officer or officers authorized to execute legal documents on behalf of the proposer.

- b. Include the names and qualifications of the key personnel or anticipated contractors who will be responsible for delivering these services, their respective roles and specific relevant experience.
- c. Any technical support staff that should be included if they will perform a significant role in the preparation of the work products. If the team has multiple offices, the office of record for each team member shall be listed, as well as the primary office location where the work is to be performed.
- d. 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 can and 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**.
- e. A high-level organizational structure of the team or organizational chart with all proposed team members.

3. Proposed Approach Narrative (No more than twentyfive pages): For the project scope period, please provide a narrative that addresses the following:

- a. Describe the proposed approach to the Scope of Services in **Attachment A** and the collaborative approach to working with SD Community Power to meet the proposed scope of contemplated services. Proposers should include responses to the narrative questions provided in each section of **Attachment A** in their Proposed Approach Narrative and any relevant Architecture, Diagrams, Technical Documentation, Case Studies or Referential information as supplemental information to the proposal.
- b. Identify the methods to be used in the completion of and/or carrying out the contemplated Scope of Services.
- c. This section should also explain common implementation challenges and how the Proposer will work with SD Community Power to resolve those challenges.
- d. Proposers should provide details in their narrative to explain what would be needed from the incumbent vendor currently providing services described in **Attachment A** to SD Community Power. The incumbent vendor has been providing these services to SD



Community Power since inception and is under a contract that extends through April 30, 2025 and/or what facilitation would need to occur with the incumbent SD Community Power vendor for these services and the transition period required, if applicable.

- e. Proposers may include other services deemed relevant to the successful accomplishment of the Scope of Services.

4. Proposed Budget & Narrative (No More than three pages): For the project scope period, please provide a narrative that addresses the following:

- a. Please provide a description of any fees and/or compensation the Proposer may seek from SD Community Power for services, inclusive of staff time, equipment, materials, travel, administrative/clerical, overhead, and other out-of-pocket expenses, if applicable to this Agreement based on a per distinct customer account defined as the unique combination of an Investor-Owned Utility (IOU) account number and Service Delivery Point and not a per customer meter fee structure.
- b. The proposer must provide an itemized breakdown of the fees and/or compensation pertinent to Customer Center and Data Management services independently.
- c. Please note, proposals with hourly billing rates, require a detailed fee summary with the following minimum requirements: (i) The total hours to complete each task, (ii) the proposed project team that will work on each task, (iii) the hourly rate for each team member or the blended rate for the entire team, and (iv) the a total annual not-to-exceed cost for the entire project as articulated in 4 (a) and (b) above.

5. Resumes & Professional Certifications (No more than three pages per team member): Provide resumes or curricula vitae, and the relevant professional certifications, for all key members of the proposed Project Team, including proposed subcontractors, if relevant. Do not embed hyperlinks in resumes.

6. Applicable Engagements or References (No more than three pages per applicable engagement or reference): Provide brief summaries of two (2) engagements or references that are similar in scope to the type of services



requested by SD Community Power in this RFP. See Attachment B for the template to fill out this information.

7. Proposed Revisions to the SD Community Power Professional Services Agreement: Any proposed revisions to SD Community Power’s Sample Professional Services Agreement (see Attachment C – Sample Professional Services Agreement) in redlined form.

8. Eligibility for additional evaluation criteria points as allowed by SD Community Power’s Procurement Policy (No more than one page): Proposers with offices located in San Diego County that include at least 25% San Diego County residents under their employment shall receive up to 5 additional points. To meet this evaluation criteria, a Proposer must include in their proposals written information for the location of their offices in San Diego County and the percentage of San Diego County residents under their employment.

9. Supplemental Information: (No more than two pages): For the initial 3-year project period, please provide a narrative that addresses the following:

- a. A description of the Proposer’s community involvement, if applicable.
- b. Relevant Case Studies, Description of any previous involvement with SD Community Power.

C. Protests

1. Protest Contents: A Proposer may protest a contract award if the Proposer believes that the award was inconsistent with SD Community Power Procurement policy or if this RFP is not in compliance with applicable law. A protest may be submitted electronically to cstephens@sdcommunitypower.org within five (5) business days after receipt of notification of the contract award. Any protest submitted after 5:00 PM of the fifth business day after notification of the contract award will be rejected by SD Community Power 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, mailing 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. *SD Community Power Review:* SD Community Power will review and evaluate the basis of the protest provided the protest is filed in strict conformity with the foregoing. SD Community Power shall provide the proposer submitting the protest with a written statement concurring with or denying the protest. Action by SD Community Power 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 SD Community Power to fully evaluate and compare the proposals. All requirements and questions in the RFP should be addressed and all requested information should be supplied. SD Community Power reserves the right to request additional information which, in SD Community Power’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. *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, but not limited to, the agreement. If any exceptions are taken, such exceptions must be clearly noted in the proposal and may be reason for rejection of the proposal. As such, Proposer is directed to carefully review the attached agreement and, in particular, the insurance and indemnification provisions therein.



2. Amendments to Proposals: No amendment, addendum or modification will be accepted after a proposal has been submitted to SD Community Power. If a change to a proposal that has been submitted is desired, the submitted proposal must be withdrawn and the replacement proposal submitted to SD Community Power 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. SD Community Power 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: SD Community Power 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 SD Community Power, such action shall serve its best interests and those of SD Community Power ratepayers. The proposers are encouraged to submit their best prices in their proposals, and SD Community Power intends to negotiate only with the Proposers whose proposal most closely meets SD Community Power’s requirements at the lowest estimated cost. The contract award, if any is awarded, will go to the proposer whose proposal best meets SD Community Power’s requirements.

F. Proposal Evaluations & Criteria

Proposals will be reviewed and ranked by a selection committee composed of SD Community Power Staff. During the evaluation process, SD Community Power reserves the right to request additional information or clarification for responses to this RFP. All submittals deemed responsive will be evaluated in accordance with the following evaluation criteria: Proposals will be evaluated in accordance with the following evaluation criteria:

	Evaluation Criteria	Points Possible
1.	Proposer’s qualifications and experience	35
2.	Demonstration of past success	25
3.	Proposer’s approach to the services requested in Attachment A	20



4.	Commercial Terms (Price) and Compliance with SD Community Power Contractual Terms	20
5.	Bonus Points/Special Preferences (optional) ⁶	Up to 5

Following the initial evaluation, SD Community Power may select one 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 SD Community Power, 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 SD Community Power’s sole discretion. SD Community Power 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 Proposers has been selected, SD Community Power will negotiate a contract for execution. If a satisfactory contract cannot be negotiated, SD Community Power may, at its sole discretion, begin contract negotiations with the next qualified Proposer who submitted a proposal, as determined by SD Community Power. Proposers are further notified that SD Community Power may disqualify any Proposer with whom SD Community Power 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. SD Community Power may, at its sole discretion, accept or reject any or all proposals submitted in response to this RFP. In addition, SD Community Power may, at its sole discretion, only elect to proceed with contract negotiations for some of the services included in the proposal. SD Community Power 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. SD Community Power 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.

⁶ For a list of bonus points/special preferences, please see SD Community Power’s Procurement Policy at: https://sdcommunitypower.org/wp-content/uploads/2022/08/SDCP-Procurement-Policy_Adopted_2022.07.28.pdf



SD Community Power shall not be liable for any costs incurred by the Proposer in connection with the preparation and submission of any proposal. SD Community Power has the right to amend the RFP, in whole or in part, by written addendum, at any time. SD Community Power 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 SD Community Power 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 SD Community Power. SD Community Power 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 SD Community Power. SD Community Power 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 SD Community Power. SD Community Power 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 SD Community Power. 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, SD Community Power 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,” SD Community Power will provide Proposers who submitted the information with reasonable notice to seek protection from disclosure by a court of competent jurisdiction.

SD Community Power 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

SD Community Power 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, SD Community Power 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 and received information from anyone or other mediums used to share information about this solicitation specified above and under the process specified herein regarding this solicitation, SD Community Power may, in its sole discretion, disqualify the proposal from further consideration.

All contact regarding this RFP or any matter relating thereto must be in writing and submitted using the Questions Submissions Form. The question form can be accessed here: <https://forms.monday.com/forms/cc68c2cdfd241773578abb2512bd5137?r=use1>

IX. REPORTING OF SUPPLIER DIVERSITY INFORMATION

Public Utilities Code Section 366.2(m) requires certain community choice aggregators, including SD Community Power, 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.⁷

To assist SD Community Power with its reporting obligations under Public Utilities Code Section 366.2(m) and with evaluating its supplier outreach and other activities, the successful proposers that is 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

⁷ www.thesupplierclearinghouse.com



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), SD Community Power shall not use any demographic information received from potential vendors in any way as part of its decision-making or selection process. Rather, SD Community Power will use such information solely for compliance with its reporting obligations to the CPUC and evaluation of SD Community Power’s outreach and other activities consistent with applicable law. Pursuant to Article I, Section 31 of the California Constitution, SD Community Power 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

SD Community Power 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 – Contemplated Scope of Services

Attachment B – Prospective Proposer References

Attachment C – SD Community Power Sample Professional Services Agreement

Attachment D – Proposal Checklist

Attachment E – SD Community Power Roadmap and Vision for the Future

[Attachment F – 15-minute interval data sample](#)



ATTACHMENT A

Contemplated Scope of Services

1.1 General Overview of Services Requested

The services requested by SD Community Power fall into several broad categories, summarized below and further outlined in the rest of this section. In general, the CCDM vendor is a key SD Community partner responsible for handling the management and processing of data to ensure accurate and complete billing of SD Community Power customers through the applicable IOU's billing framework, operating a Customer Service Center to respond to customer calls and enrollment requests, as well as ensuring accurate settlement of SD Community Power load with the California Independent System Operator (CAISO). This entails several functions:

- Managing the exchange and processing of numerous data feeds between SD Community Power and IOU, the CAISO, and other SD Community Power business partners, and making sure such data feeds are readily available to SD Community Power for its own operations.
- Supporting the implementation of SD Community Power Board approved rates, programs, rebates, credits etc.
- Managing billing-related data and processes with IOU to receive accurate billing determinants, calculate billing line items for inclusion by IOU in billing, and tracking and resolving billing exceptions accordingly.
- Operating a Customer Center to support customer inquiries related to enrollment and participation in SD Community Power products, services & programs, billing questions, and other matters relevant to CCDM.
- Operating a Billing System to provide Customer Center staff and SD Community Power staff with readily available information related to billing transactions, customer enrollments and program participation.
- Managing customer enrollment forms via SD Community Power's website, and relating such forms to the Billing System, as well as exchanging enrollment and back-end information with IOU and SD Community Power.
- Calculating Settlement Quality Meter Data (SQMD) based on billing and interval data, and ensuring data integrity, managing exceptions, and submitting SQMD data to the CAISO in accordance with CAISO rules and regulations.
- Providing enrollment, billing, payment, and payment transaction reports to SD Community Power and its partners to support financial reports and financial audits.



- Providing a comparison of SD Community Power’s Account Receivables from a Billing System perspective relative to how the IOU is aging SD Community Power’s Account Receivables.
- Providing Qualified Reporting Entity (QRE) services consistent with terms and conditions included in the Qualified Reporting Entity Services Agreement(s) between SD Community Power and CCDM, serve as QRE for certain locally situated, small-scale renewable generators or other distributed energy resources supplying electric energy to CCA through a Feed-In-Tariff (FIT) or other mechanism.

In addition to the above, SD Community Power has identified several other functions that are of fundamental importance to current SD Community Power operations and/or to future roadmap requirements:

- Ensuring high availability and reliability of interval data, currently provided by IOU through Electronic Data Interchange (EDI) and through their Data Lake. Interval data is of paramount importance to SD Community Power for forecasting and settlement purposes, customer analytics, and the deployment of new customer products and programs. Respondents should describe how they can ensure that interval data is made available to SD Community Power as quickly and reliably as possible, how they manage and track exceptions to interval data, and how they incorporate or plan to incorporate such data into their business processes.
- Allowing flexibility to support SD Community Power’s would be enterprise-wide Customer Relationship Management (CRM) application via data feeds and data transactions. Per SD Community Power’s roadmap in **Attachment E**, SD Community Power expects to own and maintain its own CRM and envisions that CRM to ultimately be the central point of information for all customer information, including information managed and processed by the CCDM vendor. SDCP’s Enterprise CRM would provide customer information for various future initiatives. Currently, SD Community Power relies on a 365 Dynamics CRM application hosted by our incumbent CCDM vendor. Therefore, respondents should address how they can support data and systems integration to the current and future state of SD Community Power CRM mechanics.
- Providing capability to support SD Community Power Local Programs across Billing Operations and Customer Center Support. SD Community Power is growing a portfolio of customer-facing programs that will need to be supported by a well-trained Customer Service Center that can answer customer questions on Programs and help direct customers to Programs that suit their specific needs, as well as providing billing capabilities that enable program enrollment and scale.
- Providing capability to support SD Community Power in supporting a cost-of-service rate model as well as dynamically priced rate offerings as needed.



Response Narrative: Please provide an overview of how your solution and/or services meets the general overview outlined above.

1.2 Data Exchanges and Data Management

1.2.1 General Requirements

The management of data and data exchanges is a core function of a CCDM vendor. Responsibilities include the processing of numerous data transactions between SD Community Power and IOU, the processing of data for SQMD purposes, and the storage and management of data in a manner that is secure, scalable and accessible to SD Community Power.

Response Narrative: Provide an overview of the technology you propose to use for processing, organizing, storing and securing all CCDM data. Provide any relevant data on file management systems, retention policies, encryption, security, and data processing flows. Also describe the methods by which SD Community Power will have access to such data, how readily SD Community Power will have access to such data, and any high-level dashboards or reports you provide to track the processing of such data.

1.2.2 EDI Transactions

SD Community Power will rely on the CCDM vendor to monitor, manage, organize, validate and secure all EDI files posted by IOU.

Response Narrative: Describe in general the way you manage, organize, validate and secure files posted to the main EDI server, with particular emphasis on how you check for missing files, corrupted files, duplicated files, etc. Provide any further information on processes you have put in place to work with IOU to manage exceptions. Include any documentation available on reporting/dashboards you would make available to SD Community Power.

1.2.3 Interval Data and Usage Data Management

Access to and the processing of interval data (meaning hourly or 15-minute data) as well as scalar data is of paramount importance to SD Community Power. SD Community Power expects its CCDM vendor to place special emphasis on retrieving and making available the most complete and accurate interval and scalar data set available.



Response Narrative: Describe in general the systems and processes you have in place for ensuring the most complete and accurate retrieval of interval and scalar data from IOU systems, and the ways in which you will make such data available to SD Community Power as quickly and reliably as possible. Provide any further information on processes you have put in place to work with IOU to manage missing data, incomplete data, meters not reporting daily, etc. Also describe any processes you have in place to ensure data integrity and completeness. Specifically address the following points:

- Support for the processing of both Estimated Settlement Quality Meter Data (ESQMD) data and billing quality Interval data (i.e. ASQMD). [See Attachment F – 15-minute interval data sample for more information.](#)

1.2.4 SD Community Power Enterprise Data Platform (EDP) Integration

SD Community Power is commissioning the building, development and implementation of a cloud based secured data infrastructure that will serve as an enterprise data platform for consumers within the organization. SD Community Power’s EDP will be built in the public cloud and would allow centralization of data across multiple sources, create data-driven analytics for several internal departments, and enable descriptive, diagnostic, predictive and prescriptive analytics. The insights from data will be used to help SD Community Power meet its mission, design innovative customer programs, forecast load, set rates, and forecast finances. The top-level goals from SD Community Power’s EDP are as follows:

- Provide a single source of truth for all reporting and analytics
- Ensure data is protected and available for compliance
- Enable Self-Service reporting for Community Power business users
- Reduce SD Community Power’s dependency on vendors for data storage and data analytics
- Deliver in-house analytics, reporting and dashboard capabilities
- Develop predictive, prescriptive analytics and machine learning models, and enable Community Power developers to develop their own

SD Community Power expects the EDP to be in place no later than December 31, 2025, and it will be an essential component of operations.

Response Narrative: Describe in general how you plan to integrate with SD Community Power’s EDP. SD Community Power welcomes alternative suggestions for how to handle exchanges of information between EDP and CCDM Systems.



1.2.5 IOU SFTP Servers & Exchange Data Transfer (EDT) Management: Annual and Weekly Customer Data Set

SD Community Power will rely on the CCDM vendor to monitor, manage, organize and secure all data posted to the IOU SFTP servers and Exchange Data Transfer (EDT) portal as applicable, with special importance placed on the weekly Recon Reports data set (also commonly known as Customer List or 4013 file in other Investor-Owned Utility (IOU) territories).

Response Narrative: Describe any salient points related to how you process or manage data on the IOU SFTP servers and Exchange Data Transfer (EDT) portal as applicable, and how you handle the secure distribution of files as necessary to all parties that may require access to such data (for example historical interval data, or one-off reports). Provide any further information on processes you have put in place to work with IOU to manage exceptions to production-related data. Finally provide details on the specific processes you have put in place related to data sets from IOU, such as:

- Weekly Recon Report file checks (i.e., checks for missing files, short files, long files, corrupt files, etc.)
- Weekly Recon Report file content QA process (i.e., checks against past Recon Report files and EDI files by Service Delivery Points, etc.)
- Annual historical interval data file content QA process (i.e., checks against past B8 files and EDI files by Service Delivery Points, etc.)

1.2.6 Managing Rates and Rate Tables

1.2.6.1 Overview of Rate Setting at SD Community Power

On an annual basis, SD Community Power’s Board of Directors sets its rates for service options in accordance with the Rate Development Policy. Even though rare, ever-changing market and regulatory dynamics could prompt intra-year rate adjustments that the CCDM vendor would be expected to support. SD Community Power’s rates are currently set based on each customer’s PCIA vintage; currently SD Community Power supports rates for vintages 2020, 2021 and 2022. With the possibility of service territory and product expansion and hence additional vintages as well as dynamically priced rate offerings and cost of service rate design, CCDM vendor’s support in this area needs to be flexible, timely and accommodating.

Response Narrative: Describe in general your billing engine’s capabilities for supporting rates and any features of the billing engine that support flexibility in rate setting.



1.2.6.2 Frequency of Rate Changes

In order to maintain value proposition to its customers, SD Community Power through its Board of Directors may introduce new service offerings, update rates any time there is a change in the IOU unbundled generation rate, Power Charge Indifference Adjustment, or Franchise Fee.

Response Narrative: Provide a general timeline for your process to update rates including basic steps, quality assurance, and time to implement.

1.2.6.3 Bill/Rate Comparison Tools

SD Community Power's incumbent CCDM vendor has developed and implemented an online bill comparison tool that performs a comparison of total bill charges for established SD Community Power rates from the user inputting certain information from the IOU bill to be compared including usage, rate and other required data. This online tool will then perform and display the total bill comparison between SD Community Power and IOU charges for the selected month, based on user inputs, IOU tariff rates and SD Community Power generation tariff rates. The online tool is made available as an interactive web page by the incumbent vendor and SD Community Power published/embedded it on its website.

Currently, SD Community Power's incumbent CCDM vendor has also developed and implemented an internal bill comparison tool to enable SD Community Power staff to generate bill comparison reports on a self-service basis that incorporate 12 months of historical interval data as provided by IOU to perform TOU-specific analysis for selected customers and account numbers.

Response Narrative: Describe in general and detail your capabilities to develop, implement and deploy an online customer facing bill comparison as well as the internal bill comparison tools and the timeline involved to make them available to SD Community Power's customers and staff.

1.2.7 Processing of Billing Determinants

1.2.7.1 Support for Current and Future Billing Determinants

SD Community Power currently matches all rate tariffs that are available to unbundled customers and supported by IOU. SD Community Power aligns billing determinants with those in the tariff, including Net Energy Metering (NEM) and Solar Billing Plan (SBP) albeit with more



customer-centric mechanics and benefits compared to IOU. Any changes to billing determinants, such as a change in the time periods of pertinent peak charges, a new season being added, and/or a new customer class being added must be supported by the billing engine.

Response Narrative: Provide a description of your NEM and SBP billing functionality and support including processing of daily true ups and annual and monthly NEM billing mechanics.

1.2.7.2 Special Rates

SD Community Power currently provides or plans to provide several billing configurations that may require special rates. Specifically, SD Community Power will start offering Disadvantaged Communities Green Tariff rates in 2025 that will have a 20% discount component. SD Community Power is also contemplating deploying cost-of-service rate design and pursuing dynamic rate offerings as reviewed and approved by our Board of Directors in compliance with certain standards and regulations. SD Community also offers some unique rates and program mechanics for certain NEM and SBP customers (see full policy and tariff under the Key Documents section on our website).

Response Narrative: Provide a general description of your billing engine architecture and how it can support special rates. Specifically note if you can already support dynamic pricing.

1.2.8 Billing Administration Implementation

SD Community Power expects for the CCDM vendor to exercise due process and care in ensuring proper Board approved rates are applied and timely submission of billing information for each customer account to IOU to meet the pertinent bill window accordingly.

Response Narrative: Since billing administration is paramount to customer experience, describe your quality assurance process of calculated line items that are sent over to IOU to be included in the customer bill. Describe how this process would apply to changes in rates such as new billing determinants or the introduction of new rate schedules. Include a standard timeline for the QA of new calculated billing line items and the controls in place to minimize and mitigate any billing exceptions and errors. Provide timelines for resolving billing exceptions and errors as well as your billing accuracy and billing timeliness metrics.



1.2.9 Customer Service Center

SD Community Power will rely on the CCDM vendor to provide best in class Customer Service Center services. In time, SD Community may wish to bring all Customer Service Center services in-house. For the immediate future, SD Community Power is interested in three potential Customer Service Center configurations as outlined in Section 1.2.9.1 below:

1.2.9.1 Customer Service Center Options for SD Community Power

SD Community Power must have the ability to facilitate some level of Customer Service Center support via in-house staff and/or within our service territory at some point in time to be determined.

A CCDM vendor must be able to support one or more of the following options upon contract start, or an agreed upon date:

- Brick and Mortar: Operate a Customer Service Center within SD Community Power service territory fully staffed by vendor agents.
- WFT (Working From Territory): Place remote vendor agents within SD Community Power service territory,
- Ensure at least 3 dedicated Customer Service Center personnel are fluent in Spanish, and ensure that an interpreter will be made available for customers whose primary language is not English.
- Staff: Support a limited number of SD Community Power-employed agents that supplement the Customer Service Center.
- Flexibility for SD Community Power to bring in-house the full scope of Customer Service Center operations at some point in time to be determined by staff and renegotiate the scope of services including charges accordingly.

Response Narrative: Describe how you would provide one or all of the above options for Customer Service Center support. Please also include translation services and languages supported.

1.2.9.2 Customer Service Center Technology

SD Community Power relies on multiple technology streams for Customer Service Center support currently offered by the incumbent CCDM vendor, including telephony, interactive voice recording, customer service email, integrated language support and web forms.

Additionally, any CRM maintained by the incumbent vendor and the successful vendor selected



from this RFP (distinct from the would-be enterprise-wide SD Community Power CRM) must provide SD Community Power direct access to its customer information within the CRM. This includes, but is not limited to: customer name, customer IOU account and service delivery point number, rate, billing history, payment history, IOU bills, enrollment status, and interaction records, usage, marketing and Contact Center interactions, program participation, Customer Service Center interactions, and a myriad of other data. The CRM must also provide a visual dashboard of key metrics which may include but are not limited to enrollment status, interaction report, program participation and product selection.

Response Narrative: Describe the technology and reporting systems used and how they integrate for superior customer service. Describe how IOU bills are stored, for how long and how these systems could be utilized in each option you could support, as identified in Section **1.2.9.1**

1.2.9.3. Vendor CRM vs. SD Community Power would be enterprise-wide CRM

As noted in Sections 1.3, SD Community Power is interested in deploying its own CRM application at some point in the future and expects to have CCDM systems, including vendor CRM, integrate with SD Community Power would be enterprise-wide CRM as noted above.

Response Narrative: Address the proposed future state integration with SD Community Power CRM including ability to support integration with SD Community Power’s future enterprise-wide CRM that may be different than CCDM’s native CRM.

1.2.9.4. Integration with Customer Service Center

The vendor CRM should integrate with the CCDM Customer Service Center to provide basic information about customers to Customer Service Center operators, and allow them to perform basic CCDM functions such as opt actions, responding to account and billing inquiries, etc. The vendor CRM should also integrate with SD Community Power would be enterprise-wide CRM as noted in section **1.2.9.3**

Response Narrative: Address how your CRM and CCDMS Customer Service Center functions are integrated, and the flexibility needed to seamlessly integrate with SD Community Power would be enterprise-wide CRM.



1.3.1 Web Enrollment Forms Support

SD Community Power will rely on the CCDM vendor to create online forms that support customer product selection including the ability to opt up or down to different service products, opt out to return to IOU service, or opt back in to return to SD Community Power service after an initial opt out. Form functionality must support the requirements of CPUC Code 366.2. The web forms must also continue to allow for customer choice indefinitely and continue to support the requirements of CPUC Code 366.2.

Response Narrative: Describe your process for integrating web enrollment forms with the SD Community Power website.

1.3.2 Enrollment & Other Notifications Support

SD Community Power may rely on the CCDM provider to generate customer lists, including all customer characteristics needed for mail and email, for requirement notifications including enrollment mailers, Late Payment Notifications, Move in notifications etc. Enrollment notification mailers require that the CCDM vendor generate a list from the Recon Report or Planning file of customers to be enrolled for service – this list must be generated a minimum of four times to account for changes in customer status and product selection (i.e. opt outs, which may also be identified through the CCDM’s CRM). Move in mailers require a biweekly list of customers that have newly started service within our territory. Miscellaneous mailers are not an on-going customer notification list; they may be required at such a time when a mass product change occurs etc.

Response Narrative: Describe your standard process for generating and providing customer lists for various notifications. Describe how you prepare a Customer Service Center for potential call volume increase related to notification activities.

1.3.3 Mass Enrollment Support

When expanding into new service territories, SD Community Power will rely on the CCDM vendor to facilitate the mass enrollment process with IOU.

Response Narrative: Describe your experience in conducting a mass enrollment with IOU and provide any issues you have experienced with the process as well as solutions to mitigate and resolve such issues.



1.3.4 Notification Support

SD Community Power may rely on the CCDM vendor to generate customer lists, including all customer characteristics needed for mail and email, for required annual notifications such as the Power Content Label mailer, which goes to active customers served at a snapshot of a given timeframe, or the Joint Rate Comparison Mailer, which goes to all currently enrolled customers at a point in time.

Response Narrative: Describe your standard process for generating, validating and providing customer lists for various communication notifications and minimize/mitigate undeliverable and returned mail. Describe how you prepare a Customer Service Center for potential call volume increase related to notification activities.

1.3.5. Customer Program Enrollment Support

In order to support SD Community Power’s Local Programs, SD Community Power will rely on the CCDM provider to educate and enroll customers in SD Community Power programs via the Customer Services Center. CSRs will need to be able to discuss programs in detail and walk customers through enrollment processes. SD Community Power would provide standard operating procedures, talking points, resources and program descriptions for eligible programs.

Response Narrative: Describe your experience in supporting customer program education and enrollments, including out-bound calls to enroll customers in programs.

1.3.6 SQMD and Other Settlement Services

The posting of SQMD data to the CAISO is an important function of a CCDM vendor. SD Community Power expects SQMD data to be calculated using interval meter data for the meters in its service territory where available.

1.3.6.1 SQMD Data Processing

Response Narrative: Describe in general the process for calculating SQMD data. Describe how actual interval meter data is used when available. Describe how the process handles meters without interval data, as well as meters where billing data is late or missing.



1.3.6.2 SQMD QA and Exception Management

Response Narrative: Describe in general the process for validating SQMD data prior to posting and how exceptions to data are handled. Describe general procedures for handling situations where required data is missing, and the settlement period is closing.

1.3.6.3 Resettlement Business Processes

Response Narrative: Please describe how provider handles situations where late data has a material impact on settled SQMD data. Define materiality threshold if possible.

1.3.7 Financial Reporting

SD Community Power will rely upon the CCDM for various financial reporting and data management functions.

1.3.7.1 General Reporting Requirements

In general, SD Community Power will require timely and accurate financial reports. Timeliness is of course dependent upon processes in place, but those processes are expected to be automated with a consistent day of delivery, such as the first business day of a month. Accuracy should be verifiable through contributing data and reconcilable across reports.

Response Narrative: Describe how provider handles situations when automated reporting systems fail, in both timeliness and accuracy. How would SD Community Power be notified of a delay in reporting? How does the provider monitor accuracy in its reports?

1.3.7.2 Banking and Accountant Transactions and Reports

SD Community Power may require the vendor to send to the accountant a summarized account of the invoice detail report it sends to IOU for invoice generation.

SD Community Power may require a Daily Payment Report to be distributed which reports customer account balances and payments. This report should be a combination of and a reconciliation between IOU UDC report submitted to the provider and the 820 Report of deposit data submitted to SD Community Power's bank. It is expected that the vendor will identify and resolve discrepancies at least weekly. The Daily Payment Report should feed a



monthly Transaction Summary Report of aggregated customer balance activity of invoices, adjustments, and payments by charge code or another relevant accounting category. Both the Daily Payment Report and the Transaction Summary are expected to reconcile with aging reports, NEM balance reports, and other balance reports month-to-month.

Response Narrative: Describe which reports the provider currently provides to clients, ability to meet SD Community Power’s reporting requirements in this category, any challenges to meet these requirements, and expected timeline to begin delivery of reports if selected.

1.3.7.3 Aging Reports & NEM Balances

SD Community Power requires the provider to deliver standardized aging reports at least monthly. These reports should account for outstanding balances by customer in both Bill Date and Due Date methodologies and should break out the balances in 30 day buckets up to 180 days and higher, and include accurate, timely NEM balances to date reconciled with cash received to SD Community Power’s bank account. Additionally, SD Community Power expects for the CCDM vendor to perform a reconciliation between how IOU is tracking and aging SD Community Power’s receivables versus how the CCDM vendor is tracking and aging the receivables.

In congruence with the Aging Report, the CCDMS will provide on-going data support and reporting with monthly/annual NEM cash-out/accruals. This data should align with all other data sources and other required reports discussed and be consistent with Recon reports.

Response Narrative: Describe the provider’s experience with aging reports and NEM balance tracking. What processes are in place to ensure accuracy with source and billing data? Are there any challenges to providing these reports?

1.3.8 Audit Requirements

Section 7.2.2 of SD Community Power’s JPA specifies that the SD Community Power Board shall contract with a certified public accountant to make an annual audit of the financial statements of SD Community Power, which shall be conducted in accordance with the requirements of Cal. Gov’t Code § 6505.5. SD Community Power’s fiscal year runs from July 1st through June 30th and its annual audit kicks off on the first business day of the new fiscal year and seeks to conclude within 150 days (i.e., by the end of November).



SD Community Power will require CCDMS financial data support and cooperation for its annual audit processes during this period. This will include comprehensive aging and payment analysis for a randomly selected sample of customers, as well as providing batch IOU bill histories, receipt sampling, invoicing, and aging balances for any time in the previous fiscal year. Although not required, SD Community Power would like to know if the provider is Service Organization Control (SOC) certified.

Response Narrative: Describe the services provided to support other customer audits. Have there been any issues with timeliness in providing batch historical data, or reconciling samples? Has there ever been a significant delay in fulfilling auditor requests? If so, please describe the issue, how it was resolved, and what has been changed to prevent the issue in the future? Please state if SOC certified.

1.3.9 Integration Considerations

Response Narrative: Please address any technological solutions or options you would like SD Community to consider as part of the technical integration of CCDM services.

1.4 Community Benefit

As a local not-for-profit public agency, SD Community Power's mission is to provide affordable clean energy and invest in the community to create an equitable and sustainable future for the San Diego region. It is of utmost importance that the CCDM vendor share the same mission of investing in the community to create an equitable and sustainable future. SD Community Power's incumbent CCDM vendor rebates three percent (3%) of its annual service fees to organizations in the San Diego region for the purpose of promoting economic development, workforce development, local project development, grid resiliency, and other areas that support the mission of SD Community Power and its communities.

Response Narrative: Describe in detail efforts undertaken to invest in the community within the San Diego region to create an equitable and sustainable future.

1.5 Qualified Reporting Entity (QRE) Services

Consistent with terms and conditions included in the Qualified Reporting Entity Services Agreement(s) between CCA and CCDM wherever applicable, SD Community Power expects the CCDM to serve as QRE for certain locally situated, small-scale renewable generators or other distributed energy resources supplying electric energy to Community Power either through a



Feed-In Tariff (FIT) or other mechanism. Community Power also expects CCDM will submit a monthly generation extract file to Western Renewable Energy Generation Information System (WREGIS) on Community Power's behalf, which will conform to the characteristics and data requirements set forth in the WREGIS Interface Control Document for Qualified Reporting Entities. As part of the contemplated scope of services, CCDM shall receive applicable electric meter data from IOU for Community Power distributed energy resource projects, consistent with IOU applicable meter servicing agreement, and shall provide such data to Community Power for purposes of performance tracking and invoice creation as applicable.

Response Narrative: Describe in detail efforts undertaken to provide QRE services on behalf of Community Power.

** Please submit responses to all requirements articulated in **Attachment A**. Reference the response narrative as appropriate.*



**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

1.	Name of Firm	Address of Firm	Contact Person	Telephone #	Fax #
	Project Name or Contract #	# of Years / Contract Term		Type of Service	Dollar Amount
2.	Name of Firm	Address of Firm	Contact Person	Telephone #	Fax #
	Project Name or Contract #	# of Years / Contract Term		Type of Service	Dollar Amount
3.	Name of Firm	Address of Firm	Contact Person	Telephone #	Fax #
	Project Name or Contract #	# of Years / Contract Term		Type of Service	Dollar Amount



ATTACHMENT C
SD Community Power SAMPLE PROFESSIONAL SERVICES AGREEMENT

SD Community Power's standard form Professional Service Agreement will be posted on SD Community Power's solicitations website (<https://sdcommunitypower.org/resources/solicitations/>) under the announcement for this RFP in PDF form.



**ATTACHMENT D
PROPOSER SUBMISSION CHECKLIST**

The following checklist outlines all items to be provided in response to this RFP. This is meant to be used as a tool to support you in the process. This checklist does not need to be submitted.

Online Application Form Hyperlink:

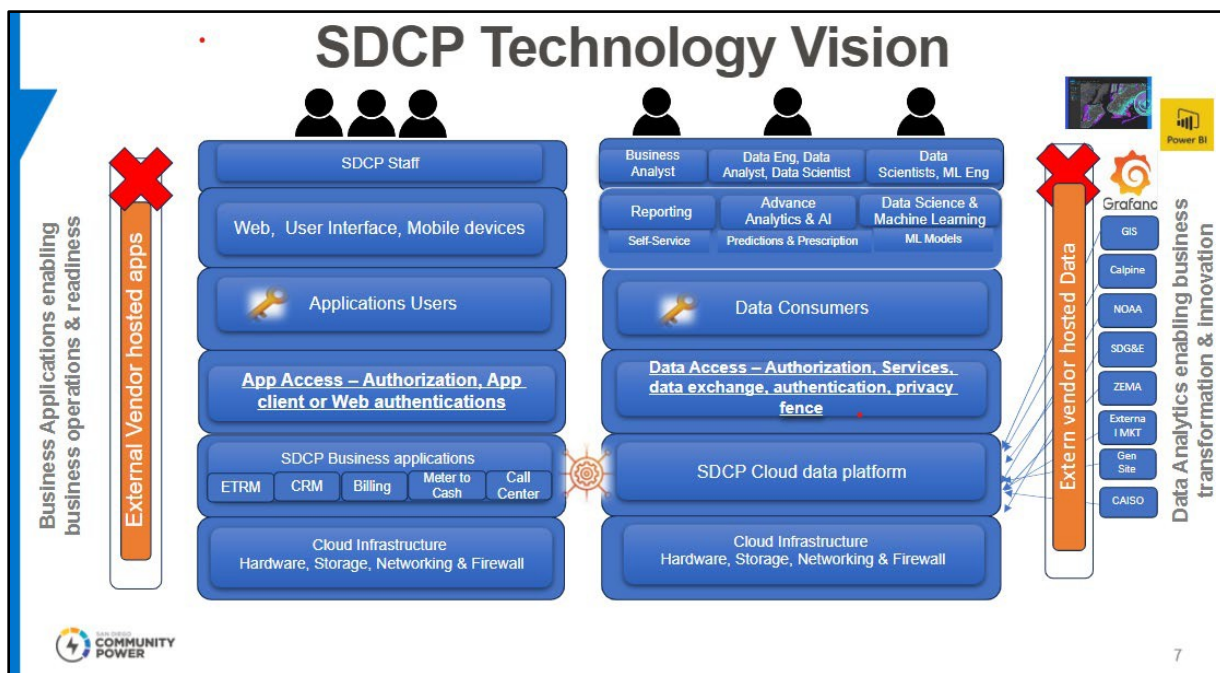
<https://forms.monday.com/forms/e1a573a46c8b3ef732e43da8696e7d32?r=use1>.

- Cover Letter (No more than 2 pages)**
- Experience & Qualifications Narrative (No more than eight pages)**
- Proposed Approach Narrative (No more than five pages)**
- Proposed Budget & Narrative (No More than three pages)**
- Resumes & Professional Certifications (No more than three pages per team member)**
- Applicable Engagements or References (No more than three pages per applicable engagement or reference)**
- Proposed Revisions to the SD Community Power Professional Services Agreement**
- Eligibility for additional evaluation criteria points as allowed by SD Community Power's Procurement Policy (No more than one page)**
- Supplemental Information: (No more than 2 pages)**

ATTACHMENT E
SD Community Power Roadmap and Vision for the Future

San Diego Community Power leadership team has a vision to insource core business applications and deliver operational efficiencies through data and digital transformation.

The snippet below captures the technology vision and transition to future state at a high level.



SD Community Power has kicked off a digital and data transformation journey and developed a short-term and long-term roadmap to deliver operational efficiencies to achieve clean energy goals established by the Board of Directors. The following highlights will help proposers with the future state of functional and technology domains.

There are four major initiatives that SDCP is currently driving to develop core operational capabilities in-house: Enterprise Data Platform, Energy Trade Risk Management system, Distributed Energy Resource Management System and Customer Relationship Management.

Enterprise Data Platform (EDP): By the end of Q3 in 2025, SD Community Power expects to have a secure data platform which will be used for centralization of all of our data from



multiple and various sources. SDCP's EDP will function as a gateway to share data internally and externally and deliver data analytics for all stakeholders of SD Community Power. This platform will house the data from CCDM and other externally available datasets. Over time, data volumes will grow to include data from other relevant operational systems.

Energy Trade Risk Management (ETRM): SD Community Power's Power services team is currently working with a third-party ETRM provider to implement a system to manage energy trading and risk portfolio. By end of Q2 in 2025, the team is expected to have the initial setup up and running. This system will have integrations with EDP. We expect any data needs from ETRM will be fulfilled by SDCP's EDP. However, CCDM vendor is expected to provide any additional data that ETRM needs from retail operations. ETRM platform is expected to evolve and be fully established by the end of 2025.

Distributed Energy Resource Management System (DERMs): By end of Q2, in 2025, SD Community Power's Program Team is expected to have the DERMs platform fully implemented. Although we currently don't expect any data needs from CCDM for DERMs, future expansion of DERMs platform may lead to some data and information needs from CCDM sources.

Customer Relationship Management (CRM): In 2025, SDCP is expected to begin work on its own enterprise CRM. The enterprise is expected to store SD Community Power's customer information that will fulfill several internal department's requirements and system integration.

Long-Term Vision – SD Community Power's leadership has a long-term vision to develop additional capabilities to serve customers and constituents. These include a fully supported customer care center and contact center. SDCP would also like to develop and insource part of revenue processing capabilities. SD Community Power's executive team is developing a long-term strategic plan that will lay the foundation for future capabilities and a future roadmap.