

SAN DIEGO COMMUNITY POWER

REQUEST FOR PROPOSALS

FOR

SAN DIEGO REGIONAL ENERGY NETWORK COMMERCIAL SECTOR PROGRAMS IMPLEMENTATION

Date of Issuance: May 8, 2025

**Submittals Due:
June 26, 2025 at 5:00 PM Pacific Time (PT)**

No. 25-008

**SAN DIEGO COMMUNITY POWER
SAN DIEGO REGIONAL ENERGY NETWORK COMMERCIAL SECTOR PROGRAMS
IMPLEMENTATION REQUEST FOR PROPOSALS**

I. BACKGROUND AND INTRODUCTION

San Diego Community Power (“Community Power”) is a Community Choice Aggregator formed via a Joint Powers Authority by the cities of Chula Vista, Encinitas, Imperial Beach, La Mesa, National City and San Diego, and the County of San Diego’s unincorporated areas. As a public not-for-profit entity, Community Power is focused on bringing cleaner power at competitive rates to its customers and investing any excess revenue back into the communities it serves. Community Power began service in 2021 and now serves approximately 960,000 customer accounts. Community Power’s mission is to bring 100 percent renewable power to its customers by 2035 or sooner, in advance of current State targets.

In 2023, Community Power developed its Community Power Plan, a five-year strategic plan for selecting, developing and offering local customer energy programs. The Community Power Plan is a culmination of a community needs assessment to ensure investments in programs and initiatives align with the priorities, needs and goals of its communities; a program market assessment to understand the universe of existing energy programs available in the San Diego region; a program prioritization framework tool to identify and rank programs; an analysis of funding sources available to implement program offerings; and a recommendation of program types and funding considerations. Energy efficiency (“EE”) was identified as a critical decarbonization strategy with available funding to administer EE programs from the California Public Utilities Commission (“CPUC”) via formation of a Regional Energy Network.

On January 5, 2024, Community Power, in partnership with the County of San Diego, submitted its Motion for Approval of the San Diego Regional Energy Network Energy Efficiency Portfolio Application.¹ As detailed in its 2024-2027 Portfolio Plan, the San Diego Regional Energy Network (“SDREN”) program portfolio consists of ten programs across the residential, commercial, public and cross-cutting (Codes and Standards, and Workforce, Education, and Training) sectors. The programs aim to serve individuals, residential and commercial customers, public agencies, and Tribal communities throughout San Diego County. On August 7, 2024, the CPUC issued D.24-08-003, which approved the proposal for SDREN and authorized SDREN as a new EE Portfolio Administrator (“PA”).² Decision 24-08-003 approved the application in its entirety, including the 2024-2027 energy savings goals and funding, as well as the 2024-2031 Strategic Business Plan.

¹ Rulemaking (“R.”) 13-11-005, Motion of San Diego Community Power on Behalf of the San Diego Regional Energy Network for Approval of Energy Efficiency Portfolio Application (Jan. 5, 2024); see also R.13-11-005, Notice of Availability of Application of San Diego Community Power on Behalf of the San Diego Regional Energy Network for Approval of 2024-2031 Strategic Business Plan, 2024-2027 Portfolio Plan, and Budget (Jan. 5, 2024).

² CPUC D.24-08-003, OP 1 (Aug. 7, 2024).

Through this Request for Proposals (“RFP”), Community Power is seeking proposals from qualified firms³ to implement the commercial sector programs – Efficient Refrigeration, Market Access and Small-to-Medium Business Energy Coach (“Services”). Community Power expects the work for this RFP to commence on or around October 6, 2025. Proposers shall review Community Power’s Procurement Policy⁴, and Inclusive and Sustainable Workforce Policy⁵ to ensure compliance when drafting proposals. Proposers may submit proposals for one or more of the programs listed below.

- The **Efficient Refrigeration Program** will provide small-scale corner stores/grocery stores and small businesses (e.g., small farm operations) no-cost, direct install energy-efficient refrigeration equipment and technical assistance to support energy cost savings and the stocking of healthy, fresh foods. The program will offer one-on-one support, education on sourcing California-grown produce and product placement/promotion, and connection to other available programs and resources.
- The **Market Access Program (MAP)** will provide performance-based incentives to project developers (aggregators) who deliver projects that realize peak demand reductions and verified energy savings. The program will utilize a population normalized metered energy consumption (NMEC) methodology to verify savings while paying incentives based on Total System Benefit (TSB) achieved, encouraging long-life measures that deliver maximum grid benefit. The program will develop a suite of tools for aggregators to use to identify high opportunity projects at facilities with significant summer and year-round peak demand reduction potential, estimate energy savings, and secure incentives. Local trusted entities will lead customer engagement to high opportunity businesses, with a focus on hard-to-reach (HTR) and underserved businesses. Aggregators will develop project opportunities and offer customizable services and financial benefits to participating businesses.
- The **Small-to-Medium Business (SMB) Energy Coach Program** is designed to provide concierge-style advisory, facility benchmarking and EE opportunity assessments, technical assistance, direct installation, and program-stacking services to small and medium-sized businesses. The SMB Energy Coach Program will help to maximize opportunities for EE upgrades available in the region that also promote an equitable transition away from methane-gas-burning technologies through electrification.

A. About the San Diego Regional Energy Network

SDREN’s governance structure is made up of an Oversight and Administration team, an Advisory Committee, a Lead Portfolio Administrator and a Program Operations Team as described below:

³ 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.

⁴ <https://sdcommunitypower.org/wp-content/uploads/2023/02/Procurement-Policy-Jul-28-2022-R202-09.pdf>

⁵ https://sdcommunitypower.org/wp-content/uploads/2022/02/SDCP_ISWF-Policy.pdf

- The Oversight and Administration team consists of Community Power and the County of San Diego. Its role is to provide portfolio-level vision and strategy, enact program changes during the portfolio cycle and oversee future Business Plan development.
- The Lead Portfolio Administrator is Community Power, and its role is to fulfill all fiscal, regulatory, procurement and program management duties.
- The SDREN Advisory Committee will include local and regional governments, community-based organizations, and other stakeholders with the role to advise on outreach and enrollment, provide feedback on program evaluation reports, and recommend program improvements.
- The Program Operations Team, primarily comprised of Community Power employees and third-party implementers, will oversee day-to-day program operations.

SDREN's vision is to be a driving force for communities to adopt clean, reliable energy through community-driven solutions that contribute to local and State EE and climate goals. SDREN's core values guide the design and execution of its program portfolio. These values are to integrate a collaborative and purposeful investment in the region's underserved and hard-to-reach communities, grow a regional clean energy economy that creates opportunities for the local workforce, and be a trusted local resource to coordinate regional policy, partnerships and programs.

SDREN's overall portfolio goal is to advance decarbonization, improve outcomes for local communities and accelerate the clean energy economy by catalyzing collaboration, supporting community-driven change and advancing environmental equity.

Program Budget

The expected not-to-exceed direct implementation and incentives budget by program for 2025-2027 is as follows:

- Efficient Refrigeration
 - Direct Implementation: \$2,028,045
 - Incentives: \$4,074,678
- Market Access Program
 - Direct Implementation: \$4,597,330
 - Incentives: \$9,006,228
- Small-to-Medium Business Energy Coach
 - Direct Implementation: \$6,567,110
 - Incentives: \$2,016,518

II. PROPOSAL SCHEDULE

The estimated timetable for this RFP is as follows:

Description	Date
Release of RFP	May 8, 2025

Deadline for Written Questions	May 15, 2025 at 5:00 PM Pacific Time (PT)
Responses to Questions Provided	May 22, 2025
Proposals Due	June 26, 2025 at 5:00 PM PT
Interviews	July 21 – August 1, 2025
Notice of Intent to Award	Mid-August 2025
Approval of Contract	September 17, 2025
Expected Commencement of Work	October 6, 2025

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

Interested parties who would like to be on a publicly posted Interested Parties List for this RFP may submit their contact information using the following form: <https://wkf.ms/4daVn0s>. Participation is completely voluntary, and inclusion on the list does not constitute prequalification, endorsement or recommendation by Community Power, nor does it guarantee participation in or award of any contract related to this RFP.

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://wkf.ms/4iUeOvE>.

All questions must be received by 5:00 PM PT on May 15, 2025. 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 Community Power not receiving the best possible responses from Proposer.

Community Power will post responses to questions on the Community Power Solicitations webpage⁶ on May 22, 2025. Community Power reserves the right to group similar questions when providing answers.

IV. PROPOSAL SUBMISSION DEADLINE

Proposals must be submitted electronically to Community Power as a single PDF document using the online Proposal Submission Forms by June 26, 2025. The Proposal Submission Forms can be accessed by using the following hyperlinks:

- **Efficient Refrigeration:** <https://wkf.ms/4m1KL7N>

⁶ <https://sdcommunitypower.org/resources/solicitations/>

- **Market Access Program:** <https://wkf.ms/3F5kFAa>
- **Small-to-Medium Business Energy Coach:** <https://wkf.ms/4k7xUPT>

A complete Proposal Submission Form from a Proposer is required to be considered as part of the RFP process. A Proposer may submit a proposal for one or more programs. A Proposal Submission Form is required for each program that a Proposer would like to be considered for.

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 will not be accepted.

V. REQUEST FOR PROPOSALS

A. Contemplated Commercial Sector Programs Implementation Scope of Work

The Services sought under this RFP are set forth in more detail in the Contemplated Commercial Sector Programs Implementation Scope of Work (**Attachments A, B and C**), attached hereto, and incorporated herein by reference. Notwithstanding the inclusion of such Services in **Attachments A, B and C**, the final scope of Services negotiated between Community Power and the successful Proposer shall be set forth in the Professional Service Agreement (“Agreement”) executed by and between Community Power and the successful Proposer. A copy of the sample Agreement is attached hereto as **Attachment G**. Community Power reserves the right to contract for up to two additional one-year extensions for these services.

Proposers are strongly encouraged to review the following supplemental documents listed below:

- SDREN’s 2024-2031 Strategic Business Plan⁷
- SDREN’s 2024-2027 Portfolio Plan⁸
- 2024 SDREN and SDG&E Joint Cooperation Memo (**Attachment I**)

B. Content and Format of Proposal

Proposals shall be concise, well organized, demonstrable of qualifications, applicable experience, and approach necessary to provide the capabilities and tasks in **Attachments A, B and C**. An **Attachment H** (Proposer Submission 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 and be single-spaced with 1-inch margins. Proposals shall be submitted in Adobe PDF format and Proposers should submit one proposal for each program they are

⁷ SDREN’s 2024-2031 Strategic Business Plan: https://sdcommunitypower.org/wp-content/uploads/2024/01/Exhibit-1_SDRENS-2024-2031-Strategic-Business-Plan.pdf

⁸ SDREN’s 2027-2027 Portfolio Plan: https://sdcommunitypower.org/wp-content/uploads/2024/01/Exhibit-2_SDRENS-2024-2027-Portfolio-Plan-1.pdf

interested in applying for. Proposers shall submit their Proposals as a single PDF and include the following items shown in this section and in the order listed as a PDF:

1. Cover Letter⁹ (No more than 2 pages for each program):

- a. Legal name and address of the company.
- b. Legal form of company (partnership, corporation).
- c. If company is a wholly owned subsidiary of a “parent company,” identify the “parent company.”
- d. Name, title, address and telephone number of the proposed representative to contact concerning the Proposal Submittal.
- e. California Business License Number.

2. Experience and Qualifications Narrative (No more than 5 pages for each program): For each program to which you are applying, provide an Experience and Qualifications Narrative that addresses the following:

- a. A high-level organizational structure of the proposal team or organizational chart with all proposed team members. Please include any subcontractors that will support delivery of the services.
- b. The proposal team’s experience delivering or coordinating the work associated with commercial sector and/or small-to-medium business programs, including the number of years of experience, types and sizes of clients and approximate number of clients.
- c. The proposal team’s experience working with Regional Energy Networks (“RENS”), California Investor-Owned Utilities and/or California Community Choice Aggregators (“CCAs”) within the energy regulatory landscape.

3. Proposed Approach Narrative (No more than 6 pages for each program): For each program to which you are applying, provide a Proposed Approach Narrative that addresses the following:

- a. The proposed approach, methods and services to meeting the capabilities and tasks described in **Attachments A, B and C** and the collaborative approach to working with SDREN.
- b. Include a schedule for pre-launch activities and program milestones.

⁹ The Cover Letter shall be signed by an individual, partner, officer or officers authorized to execute legal documents on behalf of the Proposer.

- c. Explain common implementation challenges and how your firm will work with SDREN to resolve those challenges.

4. Proposed Budget and Narrative (No more than 1 page for the Budget Narrative for each program): For each program to which you are applying, provide the total labor and non-labor cost for the Proposer to deliver the contemplated scope of work described in **Attachments A, B and C**. See **Attachment D** for the Budget template (including a Subcontractor Budget Template) and **Attachment E** for the Compensation Billing Rates that should be filled out and included along with the Proposer's submission. Subcontractor Budget Template(s) must be completed for any subcontractor with a budget allocation that is \$100,000 or more of the total requested budget.

5. Resumes and Qualifications (No more than 1 page per team member and for each program): For each program to which you are applying, provide resumes for the 5-7 key personnel who will be responsible for delivering the contemplated scope of work identified in **Attachments A, B and C**. Included resumes should correspond with the labor rates provided in the Compensation Billing Rates (**Attachment E**).

6. References (No more than 1 page for each program): For each program to which you are applying, provide three references that are similar to the contemplated scope of work described in **Attachments A, B and C**. See **Attachment F** for the Reference template that should be filled out and included along with the Proposer's submission.

7. Eligibility for additional evaluation criteria points as allowed by Community Power's Procurement Policy (No more than 2 pages for each program):

- a. Bonus Criteria Validation: In accordance with the Procurement Policy, Proposers may receive bonus points in competitive solicitations by meeting the following criteria and providing the required documentation. Please note that a Proposer may only pursue two of the four preference below, and may only receive a maximum of 10 bonus points. All documentation submitted is subject to verification by Community Power.
- San Diego County Employment: Businesses with office(s) located in San Diego County and employing at least 25% San Diego County residents will receive up to 5 additional bonus evaluation criteria points. To receive this preference, proposers must submit written information detailing the location of their office(s) in San Diego

County and the percentage of San Diego County residents under their employment.

- **Disabled Veteran Business Enterprises:** Businesses certified as disabled veteran business enterprises by the Supplier Clearinghouse (thesupplierclearinghouse.com) will receive up to 5 points or 5% out of a 100-point scoring system. To receive this preference, proposers must submit proof of current, valid certification by the Supplier Clearinghouse.
- **Persons with Disabilities Business Enterprises:** Businesses certified as a Persons with Disabilities business enterprise by the Supplier Clearinghouse or Disability:IN will receive up to 5 points or 5% out of a 100-point scoring system. To receive this preference, proposers must submit proof of current, valid certification by the Supplier Clearinghouse or Disability:IN.
- **Small Business Certification:** Businesses certified as small businesses by the Department of General Services will receive up to 5 points or 5% out of a 100-point scoring system. To receive this preference, proposers must submit proof of current, valid certification by the Department of General Services.

C. Protests

1. Protest Contents: A Proposer may protest a contract award if the Proposer believes that the award was inconsistent with Community Power's Procurement Policy, or this RFP is not in compliance with applicable law. A protest may be submitted electronically to cstephens@sdcommunitypower.org within five business days after receipt of notification of contract non award. Any protest submitted after 5:00 PM on the fifth business day after notification of the contract award will be rejected by 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. Community Power Review: Community Power will review and evaluate the basis of the protest provided the protest is filed in strict conformity with the foregoing. Community Power shall provide the Proposer submitting the protest with a written statement concurring with or denying the protest. Action by 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: Proposals must be submitted in the format identified in section V.B to allow Community Power to fully evaluate and compare the proposals. All requirements and questions in the RFP must be addressed and all requested information supplied. Community Power reserves the right to request additional information which, in 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. Preparation: Proposals should be prepared in such a way as to provide a straightforward, concise delineation of capabilities to satisfy the requirements of this RFP. Responses should emphasize the Proposer's demonstrated capability to perform work of this type. Expensive bindings and promotional materials, etc., are not necessary or desired. However, technical literature that supports the approach to providing the Services and work plan should be forwarded as part of the proposal. Emphasis should be concentrated on completeness, approach to the work, and clarity of the proposal.

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

E. Miscellaneous

1. Exceptions Certification to this RFP: In submitting a proposal in response to this RFP, Proposer is certifying that it takes no exceptions to this RFP including, but not limited to, the sample 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 sample 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 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 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 180 calendar days from the proposal due date. 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 Reject Proposals: Community Power reserves the right to 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 Community Power, such action shall serve its best interests and those of ratepayers. The Proposers are encouraged to submit their best prices in their proposals, and Community Power intends to negotiate only with the Proposers whose proposal most closely meets the requirements of this RFP. The contract award, if any is awarded, will go to the Proposer whose proposal best meets these requirements.

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

F. Proposal Evaluations and Criteria

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

	Evaluation Criteria	Criteria Weight
1.	Proposal Team's Qualifications, Experience, and Demonstration of Past Success	40
2.	Approach to Program Implementation and Feasibility	30
3.	Proposer's Budget	30
4.	Bonus Points (optional)	Up to 10
	Total	100-110

For a list of bonus points, please see Section V.B.7 above. Following the initial evaluation, 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 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 or face-to-face interviews, at Community Power's sole discretion. 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 Proposer has been selected, Community Power will negotiate a contract for execution. The Selected Proposer will be asked to complete and execute a separate Non-Disclosure Agreement. If a satisfactory contract cannot be negotiated, Community Power may, at its sole discretion, begin contract negotiations with the next qualified Proposer who submitted a proposal, as determined by Community Power. Proposers are further notified that Community Power may disqualify any Proposer with whom 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. Community Power may, at its sole discretion, accept or reject any or all proposals submitted in response to this RFP. In addition, Community Power may, at its sole discretion, only elect to proceed with contract negotiations for some of the services included in the proposal. 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. Community Power also reserves the right to waive minor errors and omissions or inconsequential disparities in proposals and request additional information.

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

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

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, Community Power has adopted policies governing procurement. Proposers are advised to review all policies, including the Procurement Policy, available on the San Diego Community Power Key Documents webpage¹⁰.

If it is discovered that the Proposer contacted and received information from anyone other than mediums used to share information about this solicitation specified above and under the process specified herein regarding this solicitation, 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 at: <https://wkf.ms/4iUeOvE>.

¹⁰ <https://sdcommunitypower.org/key-documents>

IX. REPORTING OF SUPPLIER DIVERSITY INFORMATION

Community Power, in addition to being the lead administrator of SDREN, also operates as a Load Serving Entity (“LSE”) through its status as a community choice aggregator. As a community choice aggregator, Community Power has legal requirements it must comply to pertaining to supplier diversity in contracting and procurement.

Public Utilities Code Section 366.2(m) requires certain community choice aggregators, including 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.¹¹

To assist 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 enterprises, including women business enterprises (“WBEs”), minority business enterprises (“MBEs”), disabled veteran business enterprises (“DVBs”) and lesbian gay bisexual transgender business enterprises (“LGBTBs”).

Except as otherwise expressly provided under Community Power’s Procurement Policy and/or required by applicable state or federal law or funding requirements (including, without limitation, any grant or loan conditions), 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, Community Power will use such information solely for compliance with its reporting obligations to the CPUC and evaluation of Community Power’s outreach and other activities consistent with applicable law.

X. NON-DISCRIMINATION

Community Power will not unlawfully discriminate and will require its contractors to not unlawfully 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.

¹¹ thesupplierclearinghouse.com

XI. ATTACHMENTS

Attachment A – Contemplated Commercial Sector Programs Implementation Scope of Work of the Efficient Refrigeration Program

Attachment B – Contemplated Commercial Sector Programs Implementation Scope of Work of the Market Access Program

Attachment C – Contemplated Commercial Sector Programs Implementation Scope of Work of the Small-to-Medium Business Energy Coach Program

Attachment D – Budget Template

Attachment E – Compensation Billing Rates

Attachment F – Prospective Proposer References

Attachment G – Community Power Sample Professional Services Agreement

Attachment H – Proposer Submission Checklist

Attachment I – 2024 SDREN and SDG&E Joint Cooperation Memo

ATTACHMENT A
CONTEMPLATED COMMERCIAL SECTOR PROGRAMS IMPLEMENTATION SCOPE OF WORK:
EFFICIENT REFRIGERATION PROGRAM

This scope of work is to be used as a general guide and is not intended to be a complete list of all work associated with this project. Proposers may suggest alternative approaches that will support the intent of the project and result in similar deliverables. San Diego Community Power (Community Power) reserves the right to revise or remove tasks.

Proposal strategies should align with the San Diego Regional Energy Network's (SDREN) portfolio-level strategies for program delivery:

- Incorporate principles of environmental and social justice throughout program strategies.
- Have flexible program delivery so that services can adapt and change as new programs or resources become available.
- Integrate effective coordination and collaboration with partners and trusted organizations.
- Reduce barriers to participation by offering customized support and connecting customers with available resources and programs.
- Promote decarbonization through electrification measures.
- Leverage complimentary offerings and stack supplemental program services and external funding opportunities.
- Incorporate Integrated Demand Side Management (IDSM)¹² offerings and support as a part of a holistic approach to deliver value.

The proposed scope of work is open to third-party implementers who will deliver measurable benefits that meet or exceed SDREN's annual performance goals defined in Decision 24-08-003 approving the Efficient Refrigeration program. Community Power reserves the right to redirect a program's approach or budget based on a program's success in meeting program goals and metrics.

BACKGROUND

SDREN's Efficient Refrigeration program will serve small-scale corner stores/grocery stores and small businesses (e.g., small farm operations) that sell a limited selection of food and other products. The program will provide energy efficiency education and no-cost direct installation of energy-efficient refrigeration and freezer equipment to support energy cost savings and the stocking of healthy, fresh and affordable food products. The program will offer technical assistance to identify refrigerators and freezers that are eligible for replacement with high

¹² For more information on IDSM within the CPUC's energy efficiency rolling portfolio, refer to Decision 23-06-055 starting on page 77.

efficiency units. The program aims to maximize benefits to program participants by offering one-on-one support, education on sourcing California-grown produce and product placement/promotion, and connection to other related available programs and resources. Additionally, the program will facilitate community outreach events to promote program services, provide education on the benefits and cost savings of energy efficiency and encourage the public to shop at participating business locations by highlighting the availability of fresh, healthy foods.

The program has the following goals:

1. Deliver equitable services to traditionally underserved small businesses, specifically those located in food deserts and that include refrigeration
2. Reduce peak demand by installing energy-efficient refrigeration equipment and removing old, inefficient equipment that have high running costs
3. Lower greenhouse gas (GHG) emissions
4. Increase access to local, healthy food options in underserved and hard-to-reach communities
5. Reach small businesses through various in-language and culturally appropriate marketing strategies and provide education on the benefits of energy efficiency
6. Remove barriers to participate in energy efficiency programs by offering direct install of measures and supporting connections to other available relevant programs

Program implementation services shall consist of the following tasks:

TASK 1. PROGRAM MANAGEMENT

The Implementer shall be responsible for the day-to-day program management and coordination with SDREN staff, including but not limited to creating a Work Plan and program delivery schedule, coordinating and attending meetings, managing a program budget, and communicating with staff and stakeholders, as needed. The Implementer shall develop an agenda for and lead a program kickoff meeting with SDREN staff to review the Work Plan, program goals and objectives, budget, timeline and administrative processes at a mutually determined date following contract execution.

Program management tasks shall include, but are not limited to, the following:

Task 1.1: Work Plan. The Implementer shall create a Work Plan for SDREN review and approval and provide revisions upon SDREN's request. The content of the Work Plan shall include at least the following components, in addition to content recommended by the Implementer:

- A Gantt chart to include program deliverables, projected program enrollments and project completions.
- A team organizational chart.
- Outline of strategies and activities that will be conducted to complete each task.

- Appropriate contact methods for key Implementer staff and where prospective participants can reach a single point of contact for referrals and assistance. These could include a phone number, office hours, interest form and/or other methods, and must include a dedicated email address at minimum.
- Process for coordinating with other program implementers of available commercial sector programs that utilize ratepayer funding to avoid duplication.

Task 1.2: Kickoff meeting. Coordinate and lead meeting with SDREN staff, including meeting agenda and presentation of Work Plan.

Task 1.3: Bi-weekly check-in and ad hoc meetings. Attend and coordinate meetings with SDREN staff, including preparation of meeting agendas, notes and action items.

Task 1.4: Quarterly review meetings. Attend and coordinate meetings with SDREN staff to review performance-to-date, forecasted goals and lessons learned/challenges, including preparation of meeting agendas, presentation outlines and notes.

Task 1.5: Monthly invoice. Submit all associated labor and expenses according to SDREN's invoicing policy by a mutually determined day of the month.

TASK 2. PROGRAM PRE-LAUNCH

Prior to the program launch, the Implementer shall support SDREN staff in finalizing program strategies described in the Efficient Refrigeration Program Implementation Plan¹³, finalizing operations and building customer (i.e., program participant) awareness to ensure a successful launch. Implementation pre-launch tasks shall include, but are not limited to, the following:

Task 2.1: Implementation Plan. Provide necessary updates to the Efficient Refrigeration Program Implementation Plan per CPUC requirements for SDREN staff approval and submittal to the California Energy Data and Reporting System ("CEDARS"). This includes development of the program's measures. The Implementer shall utilize and build upon the Target Measures¹⁴ in the program's Implementation Plan following eTRM requirements to design a measure mix that considers the cost of installation labor and equipment in addition to ancillary project costs for eligible refrigeration retrofits. The measure mix will include no-cost direct install measures.

The Implementation Plan update will include:

- Program delivery and customer services (e.g., define roles, technical assistance, and how energy efficiency (EE) measures will be delivered)
- Program rules (e.g., customer eligibility, participation requirements, project verification)

¹³ SDREN Implementation Plans were uploaded to the California Energy Data and Reporting System (CEDARS) on December 5, 2024.

¹⁴Efficient Refrigeration Program Implementation Plan. Table 4.

- Process flow
- Logic model
- Metrics to be tracked and reported (See Task 3.1)
- To-code savings potential
- Efficient refrigeration measures and associated deemed savings values (e.g., kW, kWh, TSB, GHG, etc.) and incentive levels.

Task 2.2: Program Manual. Develop a Program Manual complying with CPUC requirements. At minimum, the Program Manual shall include:

1. Eligible Measures: Provide list of eligible measures.
2. Customer Eligibility Requirements: Provide requirements for program participation and estimated project timelines.
3. Contractor Eligibility Requirements: List participating contractor(s) providing direct installation services and/or sub-contractor eligibility requirements (e.g. specific required trainings; specific contractor accreditations; and/or specific technician certifications required).
4. Measure Installation and Verification Requirements: Detail the post-installation verification process.
5. Additional Services: Briefly describe any additional program delivery and measure installation and/or marketing and outreach, training and/or other services provided, if not yet described above.

Task 2.3: Participant Agreement. Develop content for SDREN staff review and approval to be used for participant enrollment.

Task 2.4: Launch webinar. Prepare content for and lead program launch webinar.

Implementers may propose additional tasks or strategies for program pre-launch.

TASK 3. PROGRAM DATA AND REPORTING

The Implementer shall establish data collection methods to track and report program metrics as required for program compliance reporting and/or program evaluation. Program data and reporting tasks shall include, but are not limited to, the following:

Task 3.1: Establish data tracking and reporting tools. Including an electronic customer relationship management (CRM) system and data exchange protocols for the program.

- SDREN has identified the following metrics to be captured at a minimum:
 - kWh savings
 - Therms savings
 - Total System Benefit (TSB)
 - Number of small corner stores/grocers/small businesses enrolled and served through technical assistance and equipment installations
 - Number of in-person outreach events conducted

- Number of in-language outreach activities (events and/or marketing materials)
 - Number of direct installations of high efficiency refrigeration equipment
- Transfer defined data to SDREN’s CRM system on an agreed upon frequency and format (e.g., .csv, API, etc.).
- Ensure data systems meet industry-standard security, and that all data is encrypted, at rest and in transit.

Task 3.2: Monthly, quarterly, annual and ad hoc data and progress reports.

- Progress to goals, program challenges and solutions will be reported out monthly, and more formally reviewed and discussed quarterly. Progress reports shall document specific metrics and indicators for each task, identify how the program is performing in relation to annual goals, and include challenges encountered and recommended adjustments. Proposed metrics and indicators are included in the program’s posted Implementation Plan and will be finalized as part of the kickoff of the program.
- Support SDREN with monthly, quarterly and annual compliance filings and ensure all metrics, indicators and other information required for CPUC reporting is provided in a timely and acceptable manner.

Implementers may propose additional deliverables or strategies that ensure high-quality data tracking and reporting.

TASK 4. CUSTOMER OUTREACH, SURVEYS AND CASE STUDIES

Community Power has dedicated internal marketing and communications staff and consultant support responsible for developing and maintaining online program content, other digital media promotions and general marketing and outreach efforts. Marketing and communications staff will look to the Implementer as subject matter experts to provide content and input to develop strategies, campaigns and materials while adhering to agreed upon branding and style guidelines. The Implementer will be responsible for designing program outreach strategies, conducting outreach, facilitating customer surveys and developing case studies. Tasks shall include, but are not limited to, the following:

Task 4.1: Outreach Strategy Plan. Develop a program outreach strategy plan to include, but not limited to, the following:

- Define the program’s target audience based on the criteria identified in the SDREN Business Plan and Implementation Plan.
- Detail outreach campaigns and when they will be deployed.
- Describe how in-language and culturally sensitive outreach will be delivered.
- Develop a list of in-person outreach activities that will be deployed to the target audience.

Task 4.2: Conduct outreach.

- Deploy outreach strategies defined in the Outreach Strategy Plan (Task 4.1).
- Participate and attend approved events to promote program services to potential program participants.
- Forecast outreach targets quarterly and report number that convert to enrollments.

Task 4.3: Develop and administer a customer satisfaction survey.

- Collect feedback from program participants on their experience using program services, including barriers or challenges encountered. The Implementer shall track response rates and report on the results to SDREN staff.

Task 4.4: Develop content for program materials.

- Provide program content and data for SDREN program webpages, promotional material and other collateral.
- Propose additional materials or collateral as needed.

Task 4.5: Case studies.

- Coordinate with marketing and communications staff to produce at least three (3) case studies demonstrating program success. The case studies are intended for public distribution and will highlight successes, challenges and best practices for strategies that successfully deliver program services to program participants.

TASK 5: PROGRAM IMPLEMENTATION

To achieve the goals and serve the target audience of the Efficient Refrigeration Program, the Implementer shall deploy the following activities:

Task 5.1: Participant screening and intake.

- Screen leads and follow processes according to the Implementation Plan.
- Collect Participant Agreements (signed) and other information required for enrollment. Maintain participant records and deliver to SDREN staff, upon request.
- Respond to participants by their preferred communication channel within three (3) business days.

Task 5.2: Technical Assistance and Education. Provide one-on-one assistance and education to program participants to enroll and benefit from the program services and offerings, including:

- One-on-one assistance to store owners with enrolling into the program that removes common barriers to participation.
- Identification of refrigeration equipment that is eligible for replacement with high efficiency units.
- Education and resources on sourcing California-grown produce and product placement to encourage shopper purchases.
- Make connections to other regional and statewide resources and programs.

Task 5.3: Deliver a direct installation offering.

SDREN will utilize direct installation of deemed measures currently approved in the eTRM database and follow the Statewide Deemed Workpaper Rulebook. Installation of measures will be coordinated by the Implementer to ensure clear communication among all parties, facilitating a successful experience for program participants. The program will offer direct installation measures available at no-cost for program participants.

- Develop a Delivery Checklist to be approved by SDREN staff.
- Provide no-cost direct installation of high-efficiency refrigeration equipment with low-GWP refrigerants, encouraging future investment in energy efficiency. Includes ordering and delivery of new equipment and removal and recycling of old equipment (if applicable).
- Leverage local contractors that can deliver timely and reliable installations.
- Develop a post-installation verification process based on industry standards and best practices for these types of installations.
- Create the measure mix using deemed measures that are currently approved in the California Electronic Technical Reference Manual (eTRM) database and follow the Statewide Deemed Workpaper Rulebook.

Task 5.4: Community Outreach Events. Host community outreach events to educate community members on the benefits of energy efficiency and encourage support of participating business locations by highlighting the availability of fresh, healthy foods.

Task 5.5: IDSM strategies. Include IDSM strategies in program design such as identification of state and federal funding opportunities that fund IDSM activities and documentation of IDSM program eligibility requirements. Provide education and technical support to participants regarding implementation of new requirements related to flexible load technologies. Implementers may propose additional deliverables or strategies that have proven to help businesses access program services, increase their EE and demand response knowledge and further program goals.

ATTACHMENT B
CONTEMPLATED RESIDENTIAL SECTOR PROGRAMS IMPLEMENTATION SCOPE OF WORK:
MARKET ACCESS PROGRAM

This scope of work is to be used as a general guide and is not intended to be a complete list of all work associated with this project. Proposers may suggest alternative approaches that will support the intent of the project and result in similar deliverables. San Diego Community Power (Community Power) reserves the right to revise or remove tasks.

Proposal strategies should align with the San Diego Regional Energy Network's (SDREN) portfolio-level strategies for program delivery:

- Incorporate principles of environmental and social justice throughout program strategies.
- Have flexible program delivery so that services can adapt and change as new programs or resources become available.
- Integrate effective coordination and collaboration with partners and trusted organizations.
- Reduce barriers to participation by offering customized support and connecting customers with available resources and programs.
- Promote decarbonization through electrification measures.
- Leverage complimentary offerings and stack supplemental program services and external funding opportunities.
- Incorporate Integrated Demand Side Management (IDSM)¹⁵ offerings and support as a part of a holistic approach to deliver value.

The proposed scope of work is open to third-party implementers who will deliver measurable benefits that meet or exceed SDREN's annual performance goals defined in Decision 24-08-003 approving the Market Access Program (MAP). Community Power reserves the right to redirect a program's approach or budget based on a program's success in meeting program goals and metrics.

BACKGROUND

MAP will support an equitable transition to a decarbonized future targeted toward the San Diego region's commercial sector, specifically small-to-medium (SMB) businesses. SDREN's MAP will provide performance-based incentives to project developers (aggregators) who deliver projects that realize peak demand reductions and verified energy savings. MAP will offer complimentary measures and services through coordination with other energy efficiency programs.

¹⁵ For more information on IDSM within the CPUC's energy efficiency rolling portfolio, refer to Decision 23-06-055 starting on page 77.

MAP is a population normalized metered energy consumption (NMEC) program. All savings will be demonstrated against an existing conditions baseline including to-code savings. Capturing to-code savings may be part of any given project that is implemented as part of MAP, for any number of technologies.

These services will be offered through a program delivery model that incorporates the following techniques and best practices that act as collective benefits to all program stakeholders, including participants (i.e. businesses):

1. Relieve administrative barriers for aggregator and business enrollment, participation, site and measure eligibility, project approval and payment.
2. Increase project scope and funding opportunities through regional program coordination and layering.
3. Support businesses who lease commercial space by working closely with commercial property owners and managers to highlight the benefits of reducing unplanned equipment failures and expensive emergency repair costs.
4. Significantly reduce out-of-pocket project costs through direct installation or incentives.
5. Reduce energy bills for businesses from improved heating and cooling systems, water heating, building envelope, appliance efficiency and load flexing opportunities.
6. Installations offered by a network of skilled and vetted contractors that adhere to high-quality standards.
7. Create pathways to electrification for San Diego region's small and medium businesses.

QUANTITATIVE TARGETS

MAP will deliver savings and TSB starting as early as Q2 Calendar Year 2026. Since incentives will be delivered to aggregators based on NMEC-verified benefits to the grid (i.e., TSB), aggregators are encouraged to ensure projects realize or exceed anticipated energy savings.

Target	2025	2026	2027	Total
Total System Benefit (\$)	\$2,881,020	\$3,875,360	\$4,235,644	\$ 10,992,024
Total Savings (net kWh)	3,508,920.18	4,678,557.53	5,092,312.57	13,279,790.28
Gross First Year kW Savings*	0	0	0	0

*MAP is expected to generate demand savings, but it was not included in the modeling

COST EFFECTIVENESS TARGETS

MAP includes the following Total Resource Cost (TRC) targets that will be used to guide program cost effectiveness and will be evaluated according to the most current CPUC Cost Effectiveness Tool (CET). The Implementer must design a program that achieves the cost effectiveness targets identified below and incorporate methodologies that will be used in the proposal to ensure TSB targets are achieved. Refer to SDREN’s Tier 1 advice letter (AL 001-E)¹⁶ for the updated cost-benefit forecasts.

Target	2025	2026	2027
TRC	0.63	0.75	0.74

Program implementation services shall consist of the following tasks:

TASK 1. PROGRAM MANAGEMENT

The Implementer shall be responsible for the day-to-day program management and coordination with SDREN staff, including but not limited to creating a Work Plan and program delivery schedule, coordinating and attending meetings, managing a program budget, and communicating with staff and stakeholders, as needed. The Implementer shall develop an agenda for and lead a program kickoff meeting with SDREN staff to review the Work Plan, program goals and objectives, budget, timeline and administrative processes at a mutually determined date following contract execution.

Program management tasks shall include, but are not limited to, the following:

Task 1.1: Work Plan. The Implementer shall create a Work Plan for SDREN review and approval and provide revisions upon SDREN’s request. The content of the Work Plan shall include at least the following components, in addition to content recommended by the Implementer:

- A Gantt chart to include program deliverables, projected program enrollments and project completions.
- A team organizational chart.
- Outline of strategies and activities that will be conducted to complete each task.
- Appropriate contact methods for key Implementer staff and where prospective participants can reach a single point of contact for referrals and assistance. These could include a phone number, office hours, interest form and/or other methods and must include a dedicated email address at minimum.
- Process for coordinating with other program implementers of available commercial sector programs that utilize ratepayer funding to avoid duplication.

¹⁶ <https://sdcommunitypower.org/wp-content/uploads/2024/10/SDREN-AL-001-E-SDREN-MAP-Update.pdf>

Task 1.2: Kickoff meeting. Coordinate and lead meeting with SDREN staff, including meeting agenda and presentation of Work Plan.

Task 1.3: Bi-weekly check-in and ad hoc meetings. Attend and coordinate meetings with SDREN staff, including preparation of meeting agendas, notes and action items.

Task 1.4: Quarterly review meetings. Attend and coordinate meetings with SDREN staff to review performance-to-date, forecasted goals and lessons learned/challenges, including preparation of meeting agendas, presentation outlines and notes.

Task 1.5: Monthly invoice. Submit all associated labor and expenses according to SDREN's invoicing policy by a mutually determined day of the month.

TASK 2. PROGRAM PRE-LAUNCH

Prior to the program launch, the Implementer shall support SDREN staff in finalizing program strategies described in the MAP Implementation Plan¹⁷, developing key program documents including a Program Manual and Participant Agreement, assessing market potential, and building aggregator awareness to ensure a successful launch. Implementation pre-launch tasks shall include, but are not limited to, the following:

Task 2.1: Implementation Plan. Provide necessary updates to the MAP Implementation Plan per CPUC requirements for SDREN staff approval and submittal to the California Energy Data and Reporting System ("CEDARS"). This includes development of the program's measure methodology.

- The Implementer shall utilize and build upon the Target Measures¹⁸ in the program's Implementation Plan following eTRM requirements to design a measure mix that is 1) flexible, 2) considers the cost of installation labor and equipment, in addition to 3) ancillary project costs for energy efficiency (EE) and fuel substitution retrofits.
- The Implementer will also identify fund stacking opportunities for project scopes not fully funded or determine how MAP can meet gaps of other regional or statewide program offerings.

The Implementation Plan update will include:

- Program delivery and customer services (e.g., define aggregator role, technical assistance, and how EE measures will be delivered)
- Program rules (e.g., customer eligibility, participation requirements, project verification)
- Process flow

¹⁷ SDREN Implementation Plans were uploaded to the California Energy Data and Reporting System (CEDARS) on December 5, 2024.

¹⁸ SDREN MAP Program Implementation Plan. Table 4.

- Logic model
- Metrics to be tracked and reported (See Task 3.1)
- To-code savings potential
- Energy efficiency measures and associated deemed savings values (i.e., kW, kWh, TSB, GHG, etc.) and incentive levels.
- Update Cost-Effectiveness Forecast according to SDREN AL 001-E.

Task 2.2: Program Manual. Develop a Program Manual complying with CPUC requirements. At minimum, the Program Manual shall include:

1. Measure and project eligibility: Provide requirements for qualifying measures and projects.
2. Aggregator eligibility: Provide requirements for program participation and estimated project timelines (e.g., specific required trainings, specific contractor accreditations, and/or specific technician certifications required).
3. Incentive payment structure: Incentives for completed projects will be paid based on verified energy savings.
4. Quality assurance: Project documentation review and post-completion verification steps.
5. Additional services: Briefly describe any additional program delivery and measure installation and/or marketing and outreach, training and/or other services provided, if not yet described above.

Task 2.3: Participant and Aggregator Agreements. Develop content for SDREN staff review and approval to be used for participant and aggregator enrollment.

Task 2.4: Launch webinar. Prepare content for and lead program launch webinar.

Implementers may propose additional tasks or strategies for program pre-launch.

TASK 3. PROGRAM DATA AND REPORTING

The Implementer shall establish data collection methods to track and report program metrics as required for program compliance reporting and/or program evaluation. Program data and reporting tasks shall include, but are not limited to, the following:

Task 3.1: Establish data tracking and reporting tools. Including an electronic customer relationship management (CRM) system, measurement and verification, and data exchange protocols for the program.

- SDREN has identified the following metrics to be captured at a minimum:
 - Sum of kWh, kW and Therm savings from project completions
 - Sum of kWh, kW and Therm savings from channeling projects to other programs
 - Total System Benefit (TSB)

- Sum of greenhouse gas (GHG) reductions in tons of carbon dioxide equivalent
- Number of equity target participants expressing interest via one or more engagement channels
- Percent of disadvantaged community, underserved and hard-to-reach customer participants
- Number of and type of program referrals provided by aggregators
- Number of participating aggregators (enrollments)
- Number of projects completed (i.e., completed measure installation(s) at a program participant site)
- Number of funding and financing presentations performed to educate participants on program opportunities
- Sum of equity target and non-equity participants' expected first-year bill savings
- Dollar amount of incentives disbursed to aggregators
- Number of local entity partnerships
- Transfer defined data to SDREN's CRM system on an agreed upon frequency and format (e.g., .csv, API, etc.).
- Ensure data systems meet industry-standard security, and that all data is encrypted, at rest and in transit.

Task 3.2: Measurement & Verification

- Proposers must provide in their proposal a Measurement and Verification (M&V) Plan Outline that includes requirements for project evaluation according to population NMEC guidelines. The M&V Plan Outline must adhere to the latest NMEC Rulebook¹⁹.
- The Implementer shall develop a program-level M&V Plan to be included with the Implementation Plan filing (Task 2.1) and must include:
 - Identification of the analytical method(s) and calculation software that will be used to determine payable and claimable savings, including references to the version and up-to date documentation for the method(s) and software.
 - A description of how the method(s) and software will be used to calculate both gross and net savings and peak impacts, including how they will or will not address the following:
 - Normalization for weather and other factors.
 - Determination of net savings: Explain if using default net-to-gross values or some other method (e.g. a comparison group and other adjustments).
 - Outlier site and non-routine event identification and data treatment including filtering and other a melioration.

¹⁹ <https://www.cpuc.ca.gov/-/media/cpuc-website/files/legacyfiles/n/6442463694-nmec-rulebook2-0.pdf>

- Hourly load shape impact calculations.
- Data collection plan.
- Approach to ensure adequate monitoring and documentation of energy savings, including meter mapping for each project over the reporting period.
- A description of plans for the following, in compliance with the rules as outlined in Section II.2. of the NMEC rulebook:
 - Permissible project types
 - Program design criteria, including the calculations for forecasted average savings and fractional savings uncertainty (FSU)
 - Payments and incentives, including the schedule and structure for payments to implementers
 - Qualifying measures; v. Cost effectiveness
- Description of program participant eligibility criteria, such as the program's approach to participants with non-routine events in their baseline period, participation in other energy efficiency programs and/or other demand side management offerings (electric vehicles, solar PV, storage, tenant turnover, etc.).
- A description of how the project and program-level EULs will be calculated demonstrating compliance with current Technical Guidelines for determining weighted average EUL17, unless staff approves an alternative method for EUL calculation.
- A full description of the method(s) and calculation software that will be used to determine payable and claimable savings, and the payment terms for any planned payments (to program participants, third party implementers, contractors) based on savings measured using Population-level NMEC methods. Describe if/how payable savings may differ from claimable savings, and if so, why is this appropriate and how will the program address risk.
- Demonstrated compliance with Decision 17-11-006 Ordering Paragraph 2 for programs targeting to-code savings.

Task 3.3: Monthly, quarterly, annual and ad hoc data and progress reports.

- Progress to goals, program challenges and solutions will be reported out monthly, and more formally reviewed and discussed quarterly. Progress reports shall document specific metrics and indicators for each task, identify how the program is performing in relation to annual goals, and include challenges encountered and recommended adjustments. Proposed metrics and indicators are included in the program's posted Implementation Plan and will be finalized as part of the kickoff of the program.
- Support SDREN with monthly, quarterly and annual compliance filings and ensure all metrics, indicators and other information required for CPUC reporting is provided in a timely and acceptable manner.

Implementers may propose additional deliverables or strategies that ensure high-quality data tracking, M&V and reporting.

TASK 4. CUSTOMER OUTREACH, SURVEYS AND CASE STUDIES

Community Power has dedicated internal marketing and communications staff and consultant support responsible for developing and maintaining online program content, other digital media promotions and general marketing and outreach efforts. Marketing and communications staff will look to the Implementer as subject matter experts to provide content and input to develop strategies, campaigns and materials while adhering to agreed upon branding and style guidelines. The Implementer will be responsible for designing program outreach strategies, conducting outreach, facilitating customer surveys and developing case studies. Tasks shall include, but are not limited to, the following:

Task 4.1: Outreach Strategy Plan. Develop a program outreach strategy plan to include, but not limited to, the following:

- Define the program's target audience based on the criteria identified in the SDREN Business Plan and Implementation Plan (Task 2.1).
- Activities aggregators will perform.
- Detail outreach campaigns, how they will be segmented by target business type and needs, and when they will be deployed.
- Describe how in-language and culturally sensitive outreach will be delivered.
- Develop a list of events and conferences to attend for the purposes of program outreach to target audiences.
- Identify community-based organizations (CBOs) that will conduct SMB outreach, if applicable.
- Develop a customer referral decision tree to inform program layering recommendations.

Task 4.2 Conduct outreach.

- Deploy outreach strategies defined in the Outreach Strategy Plan (Task 4.1).
- Participate and attend approved events to promote program services to potential program participants and aggregators.
- Forecast outreach targets quarterly and report number that convert to enrollments.

Task 4.3: Develop and administer a customer satisfaction survey.

- Collect feedback from program participants and aggregators on their experience participating in the program, using program services, and barriers or challenges encountered. The Implementer shall track response rates and report on the results to SDREN staff.

Task 4.4: Develop content for program materials.

- Provide program content and data for SDREN program webpages, promotional material and other collateral.
- Propose additional materials or collateral as needed.

Task 4.5: Case studies.

- Coordinate with marketing and communications staff to produce at least three (3) case studies demonstrating program success. The case studies are intended for public distribution and will highlight successes, challenges and best practices for strategies that successfully deliver program services to program participants.

TASK 5: PROGRAM IMPLEMENTATION

MAP will deliver savings using a downstream intervention strategy where all services are offered through a third-party implementer in collaboration with aggregators, contractors, EE equipment vendors, local trusted organizations and other relevant stakeholders. MAP's design intervention strategies consider the market barriers listed in Table 2 of the MAP Implementation Plan. MAP's program model will be flexible and adaptable to work with existing programs to achieve maximum customer benefit in addition to energy and cost savings.

Task 5.1 Project screening and intake.

- Screen projects and follow processes according to Implementation Plan (Task 2.1).
- Collect Participant and Aggregator Agreements (signed) and other information required for enrollment. Maintain participant records and deliver to SDREN staff, upon request.
- Respond to participants or aggregators by their preferred communication channel within three (3) business days.

Task 5.2: Technical assistance and education.

- Assemble a team of aggregators to provide expertise and conduct activities in Tasks 5.
- Develop customized engagement strategies that allow technical assistance to be delivered to the appropriate decision-maker (e.g., SMB owner, commercial property owner or manager, contractor, etc.).
- The program will educate aggregators on available EE tax provisions, including the 179D Energy Efficient Commercial Buildings tax deduction, which was recently enhanced by the Inflation Reduction Act (IRA), in order for aggregators to bundle ratepayer-funded incentives with tax deductions to improve project cost effectiveness.
- Provide project scoping technical assistance and oversight during construction. These services should reduce time and administrative burdens for SMB participants.

Task 5.3: Installation of EE measures and performance payments.

SDREN will provide performance-based incentives to project developers (aggregators). Measures included are approved in the eTRM database and follow the Statewide Deemed Workpaper Rulebook. Installation of measures will be coordinated by the Implementer and aggregators to ensure clear communication among all parties, facilitating a successful experience for program participants.

- Draft and maintain Technical Design Guidelines. The Technical Design Guidelines will be used to guide the development of each program participant's scope of work (SOW) and shall, at a minimum, include the following:
 - Installation guidelines for all eligible measures in the MAP Implementation Plan (Task 2.1) by qualified and licensed contractors.
 - How repairs, deferred maintenance and remediation will be addressed.
 - Commercial EE upgrade scenarios and a decision tree to inform measure recommendations.
 - Process and guidelines for decommissioning gas equipment, capping gas lines and coordination with SDG&E to remove gas meter.
 - Specifications for project verification and incentive payment.
 - Provide written revisions and updates to the Technical Design Guidelines based on industry best practices and learnings from the Program every 12 months or as agreed upon with SDREN staff.
- Conduct measure installation and project completion verification.
 - Aggregators will install EE measures at enrolled businesses according to an approved SOW and timeline. Ideally project installation timelines are between 2-4 weeks and does not disrupt normal business operations.
 - After installation, the Implementer will complete a post-installation verification to confirm adherence to the QA Plan (Task 5.5), other program requirements and validation of energy savings. This must include either a field or virtual inspection and photo documentation of installed equipment.
 - The Implementer will distribute performance payments to aggregators according to the M&V Plan (Task 3.2). SDREN reserves the right to review verification materials and attend post-installation field visits prior to payment.

Task 5.4: Manage aggregator network.

- The Implementer will establish and maintain a network of aggregators²⁰ who will install EE upgrades.
- Implementer will conduct new aggregator vetting according to SDREN's standards and provide training.
- SMB participants can recommend aggregators, however, they must complete training before performing installations on behalf of the program.

²⁰ Aggregator vetting requirements will be established based on SDREN requirements.

- Aggregators and contractors must adhere to all workforce standards described in the Implementation Plan, the Program Manual and other Community Power or SDREN requirements.

Task 5.5: Quality Assurance & Control.

Develop a Quality Assurance (QA) Plan that describes the methods and processes that MAP will follow to deliver high-quality outputs, minimize errors, maintain efficiencies, incorporate continuous improvement, and satisfy participants and MAP Implementation Plan compliance. The QA Plan may include, but not limited to, the following:

- Population NMEC suitability for projects. For example, if project sites are not suitable for SDREN MAP, define referral process.
- Data access and coordination needs with Community Power and SDG&E.
- Mitigation measures used to avoid data, installation, payment or other operational errors. In addition to correction actions that will be taken in the event of any program implementation error.
- Project verification and closeout procedures (Task 5.3).

Task 5.6: Tax provision and demand response education.

- The program will educate aggregators on available EE tax provisions, including the 179D Energy Efficient Commercial Buildings tax deduction, which was recently enhanced by IRA, in order for aggregators to bundle ratepayer-funded incentives with tax deductions to improve project cost-effectiveness.
- The Implementer will develop educational materials to facilitate information sharing.

Task 5.7: IDSM strategies. Include IDSM strategies in program design such as identification of state and federal funding opportunities that fund IDSM activities and documentation of IDSM program eligibility requirements. Provide education and technical support to participants regarding implementation of new requirements related to flexible load technologies.

Implementers may propose additional deliverables or strategies that have proven to help aggregators, SMB business owners and commercial property owners access program services, complete EE or electrification projects, and/or leverage other funding opportunities that maximize energy saving opportunities.

ATTACHMENT C
CONTEMPLATED COMMERCIAL SECTOR PROGRAMS IMPLEMENTATION SCOPE OF WORK:
SMB ENERGY COACH PROGRAM

This scope of work is to be used as a general guide and is not intended to be a complete list of all work associated with this project. Proposers may suggest alternative approaches that will support the intent of the project and result in similar deliverables. San Diego Community Power (Community Power) reserves the right to revise or remove tasks.

Proposal strategies should align with the San Diego Regional Energy Network's (SDREN) portfolio-level strategies for program delivery:

- Incorporate principles of environmental and social justice throughout program strategies.
- Have flexible program delivery so that services can adapt and change as new programs or resources become available.
- Integrate effective coordination and collaboration with partners and trusted organizations.
- Reduce barriers to participation by offering customized support and connecting customers with available resources and programs.
- Promote decarbonization through electrification measures.
- Leverage complimentary offerings and stack supplemental program services and external funding opportunities.
- Incorporate Integrated Demand Side Management (IDSM)²¹ offerings and support as a part of a holistic approach to deliver value.

The proposed scope of work is open to third-party implementers who will deliver measurable benefits that meet or exceed SDREN's annual performance goals defined in Decision 24-08-003 approving the Small-to-Medium Business Energy Coach program. Community Power reserves the right to redirect a program's approach or budget based on a program's success in meeting program goals and metrics.

BACKGROUND

SDREN's SMB Energy Coach will raise awareness and increase the adoption of energy efficiency (EE) practices and measures. The program will connect a dedicated energy coach to each participating SMB to educate them on the value of EE and IDSM, provide facility benchmarking and EE opportunity assessments, offer no-cost direct installation of select measures, access to funding and financing, offer technical assistance, and install EE measures at low-to-no cost. The program will coordinate with existing programs to combine service offerings and compound the

²¹ For more information on IDSM within the CPUC's energy efficiency rolling portfolio, refer to Decision 23-06-055 starting on page 77.

programs' value, in addition to the Green Business Network, to recognize SMB participants for their EE achievements.

These services will be offered through a program delivery model that incorporates the following techniques and best practices that act as collective benefits to participants, installers and all program stakeholders:

1. Relieve administrative barriers for business enrollment, participation, site and measure eligibility, project approval and payment.
2. Increase project scope and funding opportunities through regional program coordination and layering.
3. Support businesses who lease commercial space by working closely with commercial property owners and managers to highlight the benefits of reducing unplanned equipment failures and expensive emergency repair costs.
4. Significantly reduce out-of-pocket project costs through direct installation or incentives.
5. Reduce energy bills for businesses from improved heating and cooling systems, water heating, building envelope, appliance efficiency and load flexing opportunities.
6. Direct installations offered by a network of skilled and vetted contractors that adhere to high-quality standards.
7. Create pathways to electrification for San Diego region's small and medium businesses.

Program implementation services shall consist of the following tasks:

TASK 1. PROGRAM MANAGEMENT

The Implementer shall be responsible for the day-to-day program management and coordination with SDREN staff, including but not limited to creating a Work Plan and program delivery schedule, coordinating and attending meetings, managing a program budget, and communicating with staff and stakeholders, as needed. The Implementer shall develop an agenda for and lead a program kickoff meeting with SDREN staff to review the Work Plan, program goals and objectives, budget, timeline and administrative processes at a mutually determined date following contract execution.

Program management tasks shall include, but are not limited to, the following:

Task 1.1: Work Plan. The Implementer shall create a Work Plan for SDREN review and approval and provide revisions upon SDREN's request. The content of the Work Plan shall include at least the following components, in addition to content recommended by the Implementer:

- A Gantt chart to include program deliverables, projected program enrollments and project completions.
- A team organizational chart.
- Outline of strategies and activities that will be conducted to complete each task.

- Appropriate contact methods for key Implementer staff and where prospective participants can reach a single point of contact for referrals and assistance. These could include a phone number, office hours, interest form and/or other methods and must include a dedicated email address at minimum.
- Process for coordinating with other program implementers of regionally available commercial sector programs that utilize ratepayer funding to avoid duplication.

Task 1.2: Kickoff meeting. Coordinate and lead meeting with SDREN staff, including meeting agenda and presentation of Work Plan.

Task 1.3: Bi-weekly check-in and ad hoc meetings. Attend and coordinate meetings with SDREN staff, including preparation of meeting agendas, notes and action items.

Task 1.4: Quarterly review meetings. Attend and coordinate meetings with SDREN staff to review performance-to-date, forecasted goals and lessons learned/challenges, including preparation of meeting agendas, presentation outlines and notes.

Task 1.5: Monthly invoice. Submit all associated labor and expenses according to SDREN's invoicing policy by a mutually determined day of the month.

TASK 2. PROGRAM PRE-LAUNCH

Prior to the program launch, the Implementer shall support SDREN staff in finalizing program strategies described in the SMB Energy Coach Program Implementation Plan²², developing key program documents including a program manual and participant agreement, assessing market potential, and building customer (i.e., program participant) awareness to ensure a successful launch. Implementation pre-launch tasks shall include, but are not limited to, the following:

Task 2.1: Needs Assessment. Prior to program launch the Implementer will utilize available market data, in addition to resources provided by SDREN, to evaluate the following:

- **Market demand.** Identify the prospective volume of commercial businesses with electric loads of 20kW (or smaller) in SDREN's service territory that may qualify for the program, segmented by underserved²³ and hard-to-reach²⁴ customers, and other target audience indicators. Utilize 2023 Potential and Goals (P&G) Study Results²⁵, and other public or relevant fee-based datasets to inform analysis.
- **Estimated kW and kWh savings.** Calculate potential energy savings based on measure mix and volume of estimated project completions. Leverage analysis conducted in SDREN's Business Plan Application.

²² SDREN Implementation Plans were uploaded to the California Energy Data and Reporting System (CEDARS) on December 5, 2024.

²³ SDREN Business Plan. Exhibit 1, Figure 14. *Defining Underserved Customers in SDREN's Service Territory.*

²⁴ SDREN Business Plan. Exhibit 1, Figure 15. *Defining HTR Customers in SDREN's Service Territory.*

²⁵ [2023 P&G Study Results Viewer V1.0](#); filtered for SDG&E, Commercial, Cumulative Market Potential for all measures.

- **Market gaps.** Summarize programmatic gaps from regional and statewide EE programs in SDREN’s territory and outline if/how SDREN can address programmatic gaps to serve hard-to-reach and underserved customers.
- **Risks and barriers.** Summarize risks and barriers to effectively reaching target customers, barriers to entry, project completions, energy savings and factors affecting the behavior of customers, stakeholders or industry players.

Task 2.2: Implementation Plan. Provide necessary updates to the SMB Energy Coach Program Implementation Plan per CPUC requirements for SDREN staff approval and submittal to the California Energy Data and Reporting System (“CEDARS”). This includes development of the program’s measures. The Implementer shall utilize and build upon the Target Measures²⁶ in the program’s Implementation Plan following eTRM requirements to design a measure mix that considers the cost of installation labor and equipment in addition to ancillary project costs for EE and fuel substitution retrofits. The measure mix will include both no-cost direct install measures and incentives for EE measures that can be stacked with, or meet gaps of, other program offerings.

The Implementation Plan update will include:

- Program delivery and customer services (e.g., define energy coach role, technical assistance, and how EE measures will be delivered)
- Program rules (e.g., customer eligibility, participation requirements, project verification)
- Process flow
- Logic model
- Metrics to be tracked and reported (See Task 3.1)
- To-code savings potential
- Energy efficiency measures and associated deemed savings values (i.e., kW, kWh, TSB, GHG, etc.) and incentive levels.

Task 2.3: Program Manual. Develop a Program Manual complying with CPUC requirements. At minimum, the Program Manual shall include:

1. Eligible Measures or Measure Eligibility, if applicable: Provide requirements for measure eligibility and a list of eligible measures.
2. Customer Eligibility Requirements: Provide requirements for program participation and estimated project timelines.
3. Contractor Eligibility Requirements: List participating contractor(s) providing direct installation services and/or sub-contractor eligibility requirements (e.g. specific

²⁶ SDREN SMB Energy Coach Program Implementation Plan. Table 4.

required trainings; specific contractor accreditations; and/or specific technician certifications required).

4. Site Assessment and Benchmarking Requirements: Describe processes and necessary involvement from business program participants.
5. Measure Installation and Verification Requirements: Detail the post installation verification process.
6. Additional Services: Briefly describe any additional program delivery and measure installation and/or marketing and outreach, training and/or other services provided, if not yet described above.

Task 2.4: Participant Agreement. Develop content for SDREN staff review and approval to be used for participant enrollment.

Task 2.5: Launch webinar. Prepare content for and lead program launch webinar.

Implementers may propose additional tasks or strategies for program pre-launch.

TASK 3. PROGRAM DATA AND REPORTING

The Implementer shall establish data collection methods to track and report program metrics as required for program compliance reporting and/or program evaluation. Program data and reporting tasks shall include, but are not limited to, the following:

Task 3.1: Establish data tracking and reporting tools. Including an electronic customer relationship management (CRM) system and data exchange protocols for the program.

- SDREN has identified the following metrics to be captured at a minimum:
 - Sum of kWh, kW and Therm savings from project completions
 - Sum of kWh, kW and Therm savings from channeling projects to other programs
 - Total System Benefit (TSB)
 - Sum of greenhouse gas (GHG) reductions in tons of carbon dioxide equivalent
 - Sum of all participants' greenhouse gas reductions in tons of carbon dioxide equivalent
 - Number of equity target participants expressing interest via one or more engagement channels
 - Percent of disadvantaged community, underserved and hard-to-reach customer participants
 - Number of and type of program referrals provided by energy coaches
 - Number of participating businesses (SMB enrollments)
 - Number of facilities benchmarked and EE opportunity assessments performed (benchmarking and assessment reports delivered)
 - Number of projects where technical assistance was provided (measure recommendations)

- Number of projects completed (i.e., completed measure installation(s) at a program participant site)
- Number of funding and financing presentations performed to educate participants on program opportunities
- Sum of equity target and non-equity participants' expected first-year bill savings
- Transfer defined data to SDREN's CRM system on an agreed upon frequency and format (e.g., .csv, API, etc.).
- Ensure data systems meet industry-standard security and that all data is encrypted, at rest and in transit.

Task 3.2: Monthly, quarterly, annual and ad hoc data and progress reports.

- Progress to goals, program challenges and solutions will be reported out monthly, and more formally reviewed and discussed quarterly. Progress reports shall document specific metrics and indicators for each task, identify how the program is performing in relation to annual goals, and include challenges encountered and recommended adjustments. Proposed metrics and indicators are included in the program's posted Implementation Plan and will be finalized as part of the kickoff of the program.
- Support SDREN with monthly, quarterly and annual compliance filings and ensure all metrics, indicators and other information required for CPUC reporting is provided in a timely and acceptable manner.

Implementers may propose additional deliverables or strategies that ensure high-quality data tracking and reporting.

TASK 4. CUSTOMER OUTREACH, SURVEYS AND CASE STUDIES

Community Power has dedicated internal marketing and communications staff and consultant support responsible for developing and maintaining online program content, other digital media promotions and general marketing and outreach efforts. Marketing and communications staff will look to the Implementer as subject matter experts to provide content and input to develop strategies, campaigns and materials while adhering to agreed upon branding and style guidelines. The Implementer will be responsible for designing program outreach strategies, conducting outreach, facilitating customer surveys and developing case studies. Tasks shall include, but are not limited to, the following:

Task 4.1: Outreach Strategy Plan. Develop a program outreach strategy plan to include, but not limited to, the following:

- Define the program's target audience based on the criteria identified in the SDREN Business Plan, Implementation Plan and Needs Assessment (Task 2.1).
- Detail outreach campaigns, how they will be segmented by target business type and needs, and when they will be deployed.

- Describe how in-language and culturally sensitive outreach will be delivered.
- Develop a list of events and conferences to attend for the purposes of program outreach to target audiences.
- Identify community-based organizations (CBOs) that will conduct SMB outreach, if applicable.
- Inventory other SMB programs active in SDREN's territory and determine if/how each can be layered with SMB Energy Coach.
- Develop a customer referral decision tree to inform program layering recommendations.

Task 4.2 Conduct outreach.

- Deploy outreach strategies defined in the Outreach Strategy Plan (Task 4.1).
- Participate and attend approved events to promote program services to potential program participants.
- Forecast outreach targets quarterly and report number that convert to enrollments.

Task 4.3: Develop and administer a customer satisfaction survey.

- Collect feedback from program participants on their experience using program services, including barriers or challenges encountered. The Implementer shall track response rates and report on the results to SDREN staff.

Task 4.4: Develop content for program materials.

- Provide program content and data for SDREN program webpages, promotional material and other collateral.
- Propose additional materials or collateral as needed.

Task 4.5: Case studies.

- Coordinate with marketing and communications staff to produce at least three (3) case studies demonstrating program success. The case studies are intended for public distribution and will highlight successes, challenges and best practices for strategies that successfully deliver program services to program participants.

TASK 5: PROGRAM IMPLEMENTATION

The SMB Energy Coach program will fill a need in the San Diego region for programs and services that can equitably serve the commercial sector and prompt behavioral change and commercial electrification to lower customer energy usage and costs. This includes demystifying EE funding opportunities, making program access easier, building trust in underserved communities, highlighting non-energy benefits, and creating pathways to electrification. To reach the program target audience of small and medium businesses, the Implementer shall deploy the following activities.

Task 5.1 Participant screening and intake.

- Screen leads and follow processes according to Implementation Plan (see Task 2.2).
- Collect Participant Agreement (signed) and other information required for enrollment. Maintain participant records and deliver to SDREN staff, upon request.
- Respond to participants by their preferred communication channel within three (3) business days.

Task 5.2: Technical assistance and education.

- Assemble a team of energy coaches to provide expertise and conduct activities in Tasks 5.
- Develop customized engagement strategies that allow technical assistance to be delivered to the appropriate decision-maker (e.g., SMB owner, commercial property owner or manager, contractor, etc.).
- Conduct a site assessment and benchmarking for each enrolled business to identify EE opportunities and present a report with recommended EE measures and available incentives as well as non-energy benefits.
- Provide project scoping technical assistance and oversight during construction. These services should reduce time and administrative burdens for SMB participants.
- Provide program participants with educational resources on energy management technologies, behavioral, retro-commissioning and operational (BRO) measures applicable to their facilities and other information that would not reach them through traditional SMB program models.
- Provide businesses with information on the benefits of energy conservation, energy efficiency, electrification, clean and renewable energy, demand response (DR) programs and low-global warming potential (GWP) refrigerants.
- Offer bill analysis and assistance to program participants to identify optimal utility rates for their equipment/measures installed and energy needs.

Task 5.3: Direct installation of EE measures and incentive payments.

SDREN will utilize direct installation and incentive-based deemed measures currently approved in the eTRM database and follow the Statewide Deemed Workpaper Rulebook. Installation of measures will be coordinated by the Implementer and energy coaches to ensure clear communication among all parties, facilitating a successful experience for program participants. The program will offer a menu of direct install measures available at low-to-no-cost for program participants.

- Draft and maintain Technical Design Guidelines. The Technical Design Guidelines will be used to guide the development of each program participant's scope of work (SOW) and shall, at a minimum, include the following:
 - Installation guidelines for all eligible measures in the SMB Energy Coach Program Implementation Plan (Task 2.2) by qualified and licensed contractors.

- How repairs, deferred maintenance and remediation will be addressed.
- Commercial EE upgrade scenarios and a decision tree to inform measure recommendations.
- Process and guidelines for decommissioning gas equipment, capping gas lines and coordination with SDG&E to remove gas meter.
- Specifications for project verification and incentive payment.
- Provide written revisions and updates to the Technical Design Guidelines based on industry best practices and learnings from the Program annually or as agreed upon with SDREN staff.
- Measure installation and project completion verification.
 - Contractors will install EE measures at enrolled businesses according to an approved SOW and timeline. Ideally project installation timelines do not disrupt normal business operations.
 - After installation, the Implementer will complete a post-installation verification to confirm adherence to Technical Design Guidelines, other program requirements and validate energy savings. This must include either a field or virtual inspection and photo documentation of installed equipment.
 - The Implementer will distribute incentive payments upon successful project verification.

Task 5.4: Manage contractor network.

- The Implementer will establish and maintain a network of contractors²⁷ who will install EE upgrades through direct installation services.
- The Implementer will conduct new contractor vetting according to SDREN's standards and provide training.
- SMB program participants can recommend contractors, however, they must complete training before performing installations on behalf of the program.
- Contractors must adhere to all workforce standards described in the Implementation Plan, the Program Manual and other Community Power or SDREN requirements.

Task 5.5: Program coordination, layering and customer recognition.

It is integral to the program design that SMB Energy Coach offers gap filling and complementary measures/services and leverages available external program resources to complete enrolled projects to increase program participant savings-potential and benefits. Businesses may also be recognized for their EE investments.

- Develop process to enable enrolled projects to coordinate and stack with eligible incentives from complementary programs aimed at reducing SMB utility bills, such as the SDG&E commercial programs, SDG&E on-bill financing, GoGreen

²⁷ Contractor vetting requirements will be established based on SDREN requirements.

Financing, IRA tax credits, and other local/state/federal funding and financing programs.

- Coordinate with the San Diego Green Business Network²⁸ and California Green Business Council²⁹ to provide participants with recognition for their EE upgrades.

Task 5.6: IDSM strategies. Include IDSM strategies in program design such as identification of state and federal funding opportunities that fund IDSM activities and documentation of IDSM program eligibility requirements. Provide education and technical support to participants regarding implementation of new requirements related to flexible load technologies.

Implementers may propose additional deliverables or strategies that have proven to help SMB program participants access program services, complete EE or electrification projects, and/or leverage other funding opportunities that maximize energy saving opportunities.

²⁸ <https://www.sandiego.gov/green-business-network>

²⁹ <https://greenbusinessca.org/>

ATTACHMENT D
BUDGET TEMPLATE

The budget template will be posted on the San Diego Community Power Solicitations webpage³⁰ under the announcement for this RFP as an Excel file (.xlsx). Please include the completed spreadsheet as a PDF in your submittal.

³⁰ <https://sdcommunitypower.org/resources/solicitations>

**ATTACHMENT E
COMPENSATION BILLING RATES**

<u>Name</u>	<u>Title</u>	<u>Hourly Rate</u>
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**ATTACHMENT F
PROSPECTIVE PROPOSER REFERENCES**

Proposer's Name: _____

For each program, provide three 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 #	Email Address
	Project Name or Contract #	# of Years / Contract Term		Type of Service	Dollar Amount
2.	Name of Firm	Address of Firm	Contact Person	Telephone #	Email Address
	Project Name or Contract #	# of Years / Contract Term		Type of Service	Dollar Amount
3.	Name of Firm	Address of Firm	Contact Person	Telephone #	Email Address
	Project Name or Contract #	# of Years / Contract Term		Type of Service	Dollar Amount

ATTACHMENT G
COMMUNITY POWER SAMPLE PROFESSIONAL SERVICES AGREEMENT

San Diego Community Power's standard Professional Services Agreement will be posted on the San Diego Community Power solicitations webpage³¹ under the announcement for this RFP in PDF form.

³¹ <https://sdcommunitypower.org/resources/solicitations>

ATTACHMENT H 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 as part of the Proposal. Proposal Submission Forms Hyperlinks:

- **Efficient Refrigeration Program:** <https://wkf.ms/4m1KL7N>
 - **Market Access Program:** <https://wkf.ms/3F5kFAa>
 - **Small-to-Medium Business Energy Coach Program:** <https://wkf.ms/4k7xUPT>
-
- ☐ Cover Letter - *No more than 2 pages for each program*
 - ☐ Experience and Qualifications Narrative - *No more than 5 pages for each program*
 - ☐ Proposed Approach Narrative - *No more than 6 pages for each program*
 - ☐ Proposed Budget and Narrative - *No More than 1 page for the budget narrative for each program*
 - ☐ Resumes and Qualifications - *No more than 1 page per team member and for each program*
 - ☐ References - *No more than 1 page for each program*
 - ☐ Eligibility for additional evaluation criteria points as allowed by Community Power's Procurement Policy - *No more than 2 pages for each program*

ATTACHMENT I
2024 SDREN AND SDG&E JOINT COOPERATION MEMO

The 2024 SDREN and SDG&E Joint Cooperation Memo will be posted on the San Diego Community Power Solicitations webpage³² under the announcement for this RFP in PDF form.

³² <https://sdcommunitypower.org/resources/solicitations>