



SAN DIEGO COMMUNITY POWER

REQUEST FOR PROPOSALS ("RFP")

FOR

CUSTOMER RELATIONSHIP MANAGEMENT ("CRM") IMPLEMENTATION AND AS-NEEDED PROFESSIONAL SERVICES

Date of Issuance: June 5, 2025

**Submittals Due:
July 2, 2025 at 5:00 PM Pacific Time (PT)**

No. 25-005

**SAN DIEGO COMMUNITY POWER RFP FOR
CRM IMPLEMENTATION AND
AS-NEEDED PROFESSIONAL SERVICES**

I. BACKGROUND AND INTRODUCTION

San Diego Community Power (“Community Power”) is a Community Choice Aggregator formed via a Joint Powers Authority for the cities of Chula Vista, Encinitas, Imperial Beach, La Mesa, National City, 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.

Through this RFP, Community Power is seeking proposals from qualified individuals or firms¹ to provide not only Systems Integration (“SI”) services but also to support the development and deployment of an organization-wide Customer Relationship Management (“CRM”) platform. This platform should address multiple use cases across different functional areas within the organization, as outlined in **Attachment A**. These services aim to deliver a trusted, reliable and seamless integration experience that maximizes the quality of services and delivers optimal value to Community Power and, by extension, our customers.

Community Power relies on multiple technology streams for its current Customer Contact Center support provided by the incumbent Contact Center & Data Management vendor (“CCDM”), including telephony, Interactive Voice Response (“IVR”), customer service email, integrated language support and web forms. The incumbent CCDM vendor manages all aspects of back-office services including but not limited to Electronic Data Interchange (“EDI”) transaction processing with San Diego Gas & Electric (“SDG&E”), billing and customer payment application, Contact Center operation management, web form management for customer opt actions, and all aspects pertaining to CRM functions through Microsoft Dynamics as well as data storage.

The CCDM vendor also handles all aspects of the existing CRM data inputs from SDG&E via a weekly refresh of metadata for Community Power’s eligible customers, daily EDI feeds for active customer accounts, inputs from the Contact Center including Interactive Voice Response and live Customer Service Representative interactions and data updates from web forms embedded on Community Power’s website. These web forms, developed by the CCDM vendor, allow customers to self-serve actions such as product election changes or opting out of Community Power services. The CCDM-hosted and -supported Microsoft Dynamics 365 CRM is refreshed daily to capture all customer interactions through the Contact Center, including those via IVR, Customer Service Representative-handled calls and email correspondences received. It

¹ 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.

also maintains records of both statutory and non-statutory customer notifications. The CCDM makes specific data points emanating from their MS 365 Dynamics CRM available to Community Power staff through a dedicated CRM instance and designated Microsoft SQL Server Views, which staff can call on securely by querying directly or via API calls.

Through this RFP, Community Power is seeking professional services vendor to bring all CRM functions in-house under an enterprise-wide CRM platform that is licensed, owned and maintained by Community Power. Proposers are expected to clearly articulate the scope of development, configuration, deployment, support and maintenance required for a standalone Community Power CRM.

Community Power's Requirements:

- The contemplated CRM solution must be built on a cloud platform.
- The enterprise-wide CRM solution will be built for and owned by Community Power, enabling the organization to manage and operate it independently. After the contracted support period, Community Power must retain full control of the platform with no reliance on the contractor for ongoing licensing and support costs.
- The CRM must integrate with the Contact Center and Data Management functions described above to provide a comprehensive 360-degree view of its customers and stakeholders. It must also support the needs and use cases of all functional areas, including Public Affairs, Programs and San Diego Regional Energy Network ("SDREN") teams, as outlined in **Attachment A**.
- The CRM solution must be configured to accommodate the unique requirements of SDREN operations, including as a stand-alone instance that ensures data segregation between SDREN and Community Power customer data for privacy compliance. This is necessary because SDREN serves customers across San Diego County, including those outside Community Power's jurisdiction.
- The selected Proposer will handle all customer and sensitive data responsibly, using industry-standard best practices for data protection.
- The selected Proposer must provide an operational model and organizational structure to support CRM operations.
- The selected Proposer must provide an ongoing support and service model throughout the term of the service provision to Community Power.
- The selected Proposer must be available to support the platform build during the contracted support period during Community Power's business hours (9:00 AM to 5:00 PM Pacific Time, Monday through Friday).
- The selected Proposer must demonstrate expertise in building enterprise CRM platforms, managing large volumes of data and integrating multiple systems and vendors using diverse data inputs.

Proposers must demonstrate their capability to perform the requested services. To qualify for consideration, respondents must have experience delivering similar services to one or

more of the following: Investor-Owned Utilities (IOUs), Publicly Owned Utilities (POUs), Electric Service Providers (ESPs), Community Choice Aggregators (CCAs), or other organizations with comparable operational complexity and regulatory requirements.

Proposers may submit proposals that include subcontractors for specific components of the work. However, Community Power will only consider complete proposals that address the full scope of services and functionality outlined in **Attachment A**. Proposals that address only a portion of the requirements, or that are submitted solely by subcontractors without a lead proposer, will not be considered. For more information, please visit Community Power’s website.² Proposers are required to review Community Power’s Procurement Policy³ and Inclusive and Sustainable Workforce Policy⁴ to ensure compliance when drafting proposals.

II. PROPOSAL SCHEDULE

The estimated timetable for this RFP is as follows:

Description	Date
Release of RFP	June 5, 2025
Deadline for Written Questions	June 18, 2025, at 5:00 PM Pacific Time (PT)
Responses to Questions Provided	June 23, 2025
Proposals Due	July 2, 2025, at 5:00 PM PT
Interviews/Demos	July 7-9, 2025
Notice of Intent to Award	Mid-July 2025
Board of Directors Meeting / Approval of Contract	August 26, 2025
Expected Commencement of Work	September 15, 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 services, and Community Power retains the sole discretion to cancel or modify any part of or all of this RFP at any time.

III. QUESTIONS AND RESPONSES

Proposers may submit questions regarding this RFP using the online Questions Submissions Form. The question form can be accessed by using the following hyperlink: <https://wkf.ms/4hf2gie>.

All questions must be received by 5:00 PM PT on June 18, 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

² www.sdcommunitypower.org

³ <https://sdcommunitypower.org/wp-content/uploads/2023/02/Procurement-Policy-Jul-28-2022-R202-09.pdf>

⁴ <https://sdcommunitypower.org/wp-content/uploads/2022/02/SDCP-ISWF-Policy.pdf>

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 Webpage⁵ on June 23, 2025. Community Power reserves the right to group similar questions when providing answers.

IV. PROPOSAL SUBMISSION DEADLINE

Proposals should be submitted electronically to Community Power as a single PDF document using the online Proposal Submission Form by July 2, 2025. The Proposal Submission Form can be accessed by using the following hyperlink: <https://wkf.ms/40A6Roj>.

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. Scope of Services

The services sought under this RFP are set forth in more detail in **Attachment A**, attached hereto and incorporated herein by reference. Notwithstanding the inclusion of such services in **Attachment A**, the final scope of services negotiated between 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 draft Agreement is attached hereto as **Attachment C**.

B. Content and Format of Proposal

Proposals shall be concise, well organized, and demonstrate qualifications and applicable experience and approach necessary to provide the required scope of services. An **Attachment D** (Proposal Checklist) has been included in this RFP package to assist Proposers with preparing and submitting a complete proposal. Ideally, proposals should use Calibri 12-point font, be single-spaced with 1-inch margins. Community Power expects that its enterprise-wide CRM platform implemented as part of the services sought in this RFP will be integrated with the Contact Center and Data Management functions currently handled by our third party vendor, Calpine Community Energy along with all the other use cases that are captured on **Attachment A**. Proposals shall be submitted in Adobe PDF format and should factor in, take into account, and address the aforementioned required integration with the Contact Center and Data Management functions as part of the narrative in terms of how the Proposers will look to address and meet Community Power’s needs related to not only current state but also its vision for the future that

⁵ <https://sdcommunitypower.org/resources/solicitations/>

could allow for bringing the Contact Center function in-house as part of their response to this RFP.

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

- 1. Cover Letter (Maximum 2 pages):**
 - a. Legal name and address of the company or companies and/or any applicable sub-contractor(s).
 - b. An executive summary explaining the content of your proposal in a clear and concise manner.
 - c. Legal form of company or companies (partnership, corporation).
 - d. If company is a wholly owned subsidiary of a “parent company,” identify the “parent company.”
 - e. Name, title, address and telephone number of the proposed representative to contact concerning the Proposal Submittal.
 - f. California Business License Number.
- 2. Experience & Qualifications Narrative (Maximum 8 pages):** For the project scope period, please provide a narrative that addresses the following:
 - a. A description of your team’s qualifications to provide the Scope of Services in Attachment A. The qualifications & key personnel should speak to relevant experience with the CCA or energy regulatory landscape or utility experience.
 - b. Include the names and qualifications of the key personnel or anticipated contractors who will be responsible for delivering these services, their respective roles and specific relevant experience.
 - c. Any technical support staff that should be included if they will perform a significant role in the preparation of the work products. If the team has multiple offices, the office of record for each team member shall be listed, as well as the primary office location where the work is to be performed.
 - d. To the extent that a Proposer lacks specific expertise in any of the areas described in **Attachment A**, a professional team of subcontractors or associate firms can and should be assembled by the Proposer to complement their technical expertise. Please include any subcontractors that will support one or more of the service areas described in **Attachment A**.
 - e. A high-level organizational structure of the team or organizational

chart with all proposed team members.

3. **Proposed Approach Narrative (Maximum 5 pages):** For the project scope period, please provide a narrative that addresses the following:
 - a. Describe the proposed approach to the Scope of Services in **Attachment A** and the collaborative approach to working with Community Power to meet the proposed Scope of Services. Proposers should include any relevant Architecture, Diagrams, Technical Documentation, Case Studies or Referential information as supplemental information to the proposal as it relates to **Attachment A**.
 - b. Identify the methods to be used in the completion of and/or carrying out the Scope of Services.
 - c. This section should also explain common implementation challenges and how the Proposer will work with Community Power to resolve those challenges.
 - d. Proposers should provide details in their narrative to explain what would be needed from the incumbent vendor currently providing Contact Center & Data Management services, who currently hosts and supports Community Power's Microsoft Dynamics 365 CRM instance as it relates to the Scope of Services in **Attachment A** including, but not limited to, what facilitation would need to occur with the incumbent vendor, if applicable.
 - e. Proposers may include other services deemed relevant to the successful accomplishment of the Scope of Services.
4. **Proposed Budget & Narrative (Maximum 3 pages):** For the project scope period, please provide a narrative that addresses the following:
 - a. Please provide a description of any fees and/or compensation the Proposer may seek from Community Power for the services, inclusive of staff time, equipment, materials, travel, administrative/clerical, overhead, and other out-of-pocket expenses.
 - b. The Proposer must provide an itemized breakdown of the fees and/or compensation pertinent to use cases associated with Community Power and San Diego Regional Energy Network ("SDREN") teams independently. Please note that the use cases pertinent to SDREN as articulated in **Attachment A** will be paid for by separate funds and the Proposer must delineate the itemized breakdown of their fees and/or compensation to account for this fact.
 - c. Please note, proposals with hourly billing rates require a detailed fee summary with the following minimum requirements:

- i. total hours to complete each task;
- ii. proposed project team that will work on each task;
- iii. hourly rate for each team member or the blended rate for the entire team; and
- iv. total annual not-to-exceed cost for the entire project, as articulated in 4.a and 4.b above.

5. Resumes & Professional Certifications (Maximum 3 pages per team member): Provide resumes or curricula vitae, and the relevant professional certifications, for all key members of the proposed Project Team, including proposed subcontractors, if relevant. Do not embed hyperlinks in resumes and professional certifications.

6. Applicable Engagements or References (Maximum 3 pages per applicable engagement or reference): Provide brief summaries of two (2) engagements or references that are similar in scope to the type of services requested by Community Power in this RFP. See Attachment B for the template to fill out this information.

7. Eligibility for additional evaluation criteria points as allowed by Community Power's Procurement Policy (No more than 2 pages for each program): 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 criteria below, and may only receive a maximum of 10 bonus points. All documentation submitted is subject to verification by Community Power:

- i. **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.
- ii. **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.
- iii. **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.

- iv. **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.

8. Technical and Cybersecurity Questions (No more than 2 pages): Provide detailed answers to the questions in **Attachment E**.

9. Supplemental Information: (Maximum two (2) pages): For the project period, please provide a narrative that addresses the following:

- v. **Narrative Description of Community Involvement:** Provide a description of the Proposer's community involvement, if any.
- vi. **Relevant Case Studies:** Description of any previous involvement with Community Power or a similar organization, if any.

C. Protests

1. **Protest Contents:** A Proposer may protest a contract award if the Proposer believes that the award was inconsistent with Community Power Procurement policy or if this RFP is not in compliance with applicable law. A protest may be submitted electronically to cstephens@sdcommunitypower.org within five (5) business days after receipt of notification of the contract non-award. Any protest submitted after 5:00 PM of 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. 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 Community Power 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 and Experience	20
2.	Demonstration of Past Success	25
3.	Proposal's Approach to Implementing and Delivering the Requested Solution in Attachment A	35
4.	Commercial Terms (Price)	20
5.	Additional Criteria Points (Optional)	Up to 10
	Total Possible Points:	100-110

For a list of additional criteria, please see Section V.B.7. Following the initial evaluation, Community Power may select one Proposer or select a number of Proposers (with or without interviews); or conduct interviews and demos 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 interest with other clients or fees/compensation amount or structure. Interviews may take place through written correspondence, telephone or video conference, and/or face-to-face interviews, at 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 may 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 Community Power's website.⁶

If it is discovered that a 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/4hf2gie>.

⁶ : <https://sdcommunitypower.org/resources/key-documents/>

IX. REPORTING OF SUPPLIER DIVERSITY INFORMATION

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.⁷

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 Proposer(s) 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.

XI. ATTACHMENTS

Attachment A – Scope of Services

Attachment B – Prospective Proposer References

Attachment C – Community Power Sample Professional Services Agreement

Attachment D – Proposer Submission Checklist

Attachment E – Technical and Cybersecurity Questions

⁷ <https://thesupplierclearinghouse.com/>

ATTACHMENT A
CRM IMPLEMENTATION AND AS-NEEDED PROFESSIONAL SERVICES

I. Scope of Services

The following section lists a high-level overview of the services or deliverables SDCP expects from the selected Proposer.

- A.** Review of the existing data models and flows including the CCDM MS Dynamics 365 CRM as articulated in the background and introduction section to determine proper configuration and recommendation of the contemplated enterprise-wide CRM solution.
- B.** Assist with development and deployment of a scalable and secured enterprise-wide CRM solution in the cloud. The enterprise-wide CRM solution will be built for and owned by Community Power so that Community Power can manage and operate it. After the contracted support period, Community Power shall have independence and control of the entire platform without reliance on the contractor for the ongoing licensing and support costs.
- C.** Assist with developing, testing and scheduling of ongoing multiple data integrations between CCDM MS Dynamics 365 CRM, Community Power's Distributed Energy Resource Management System (DERMS) and other data sources to the enterprise-wide CRM solution.
- D.** Ensuring that the enterprise-wide CRM solution will need to be configured such that it accounts for the very nuanced setup for Community Power's operation of the San Diego Regional Energy Network (SDREN) as a stand-alone instance to keep segregation of SDREN specific customer data firewalled from Community Power customer data for privacy reasons. The underlying reason for this nuance is because SDREN operations will consist of customers across San Diego County as a whole, including those customers that do not fall under the jurisdiction of Community Power. There will still be a need for an ongoing integration between the segregated SDREN instance of the CRM to the CCDM 365 CRM Dynamics currently hosted and supported by Community Power's CCDM vendor specific to just the Community Power customers.
- E.** Configuration of specific, segregated and segmented secured access to vendors and contractors to some sections of Community Power's enterprise-wide CRM solution.
- F.** Creation of associated secured web-based intake forms that can be embedded on Community Power's website for various programs and other related tasks with a back-end link to the underlying enterprise-wide CRM solution.
- G.** Self-service reporting for approximately 50 business users and allow customization of reports, dashboards and outputs in csv, Excel, PDF formats etc.

- H.** Automated refreshes of source data at desired frequencies with the ability to initiate a refresh on-demand, as needed.
- I.** Automated monitoring of data pipeline health and data quality.
- J.** Protection and security of data using best practices.
- K.** Robust user access management, control and monitoring.
- L.** Data lineage and tracking throughout the platform.
- M.** Compliance with all internal and external policies.
- N.** Provision of detailed project plan and milestones.
- O.** Dedicated client-facing resource for project management and status tracking and reporting.
- P.** Identification and documentation of best practices for the administration of the enterprise-wide CRM solution once it has been developed, implemented and deployed.
- Q.** Facilitation and co-hosting functional and technical meetings as needed.
- R.** Tracking of resource plans and costs.
- S.** Provision of updates and projections on costs.

II. Contemplated Tasks

The following tasks are provided to illustrate the types of activities the selected Proposer may be expected to perform under the Scope of Work.

A. Administration

1. Provide a robust project implementation roadmap for CRM implementation and as-needed services.
2. Provide monthly progress reports.
3. Provide monthly budget reports.
4. Provide price estimates for operating CRM, including all licenses, tools, cloud storage and resource costs.
5. Gather and document requirements through collaboration with Community Power team.
6. Provide testing plan for user acceptance.
7. Provide training materials and meetings for developers and end users.
8. Train Community Power staff on administration, operation, maintenance, and security protocols.
9. Provide tracking log of all bugs and enhancements.

10. Provide thorough documentation of entire platform.
11. Align with Community Power's agile cadence and follow two-week sprint schedule as needed.
12. Schedule any necessary regular meetings during Community Power's business hours between 9am and 5pm Pacific Time, Monday through Friday.
13. Report and resolve all major bugs and issues before completion of the project.

B. Platform Development and Deployment

1. Architect end-to-end cloud-based CRM solution.
2. Configure end-to-end cloud environment, including cloud storage, resources, and tools.
3. Set up billing alerts to monitor cloud operational costs.
4. Follow best practices for version control, documentation, security, change management.
5. Develop security and user access framework for protecting, managing, and monitoring data.
6. Classify data by sensitivity and limit access based on classification.
7. Develop data cleaning and validation procedures.
8. Build the requisite ETL/pipelines.
9. Ingest existing data into CRM.
10. Refresh source data into CRM according to requested frequency.
11. Develop sandbox or test environment as needed.
12. Integrate with data analysis or visualization tools such as PowerBI, Tableau, and Looker to allow Community Power users to create their own visualizations and reports.
13. Enable self-service reporting and customization of reports and dashboards.
14. As-needed support for the proposed solution.

C. Support

1. Manage user roles and access permissions.
2. Troubleshoot issues from Community Power developers and end users.
3. Manage integration of tools.

III. FUNCTIONAL BACKGROUND, REQUIREMENTS AND USE CASES

Functional Background, Requirements and Use Cases from the multiple organization-wide functional teams and departments who are the key stakeholders in the enterprise-wide CRM implementation solution

A. Customer Operations Department:

1. **Background:** The Customer Operations Team works closely with the CCDM vendor to ensure customers are billed accurately and timely while also providing customers with immediate assistance in answering questions and accommodating service requests. All customer interactions with Community Power website, IVR, and Contact Center are documented for staff and agent visibility via the CCDM-hosted and supported Microsoft Dynamics 365 CRM. The Customer Ops Team will rely on the enterprise-wide CRM platform in providing billing and enrollment history, account information, and program participation details to inquiring customers.

2. Use Cases:

- a. Program participation details – details of a customer’s participation in and awarded incentive resulting from a program should be made available should customers inquire with the SD Community Power Contact Center.
- b. Customer interactions with staff – interactions between Community Power staff including Contact Center personnel and customer accounts (through email, public outreach events, personal meetings, etc.) should be cohesively documented/tracked for visibility, record-keeping, and historical reference that will facilitate in a consistent customer experience via the enterprise-wide CRM. Any and all correspondence sent to customers by Community Power (e.g., email blasts, personalized and direct email exchanges, newsletters, phone calls, etc.) should also be documented within the enterprise-wide CRM.
- c. Customer Contact Information – customer contact details, including name, account number, phone number, email address, mailing address etc., and points of contact should be hosted for ease of communication with the customer. Instances of manually added contact details should not be over-written by regular syncs from the utility data.

B. Customer Programs Department:

1. **Background:** The Programs team develops and manages several customer energy programs and pilots. The Programs team will rely on the CRM to support end to end program delivery, from customer eligibility verification and enrollment to incentive payments,

auditing, and evaluation. The CRM will need to interface via API with other commercial systems like Community Power's Distributed Energy Management System (DERMS). The CRM will need to support the general tasks below:

- a. **Customer Information & Management** – maintain all customer billing and contact information, all program participation (active and past), climate zone, census tract and community of concern eligibility and any other customer program information required for eligibility.
- b. **Program Application Portal** – Front-end application portal for program applicants (e.g., customers, contractors) to complete program applications via webform, submit required documentation, input program specific customer and project information (e.g., measure name and type, product/system installed information (manufacturer, product name, serial number, etc.), equipment costs), and check application status (e.g., application reserved, application rejects, installation approved). Some programs may require multi-step collection from applicants. Could involve user profile creation with passwords for varying levels of access. The incentive program application portal would enable Program Enrollment & Management functions outlined above.
- c. **Program Enrollment & Management** – Customizable functionality and solutions for validating program eligibility, managing multi-program enrollment for a single customer, enrollment status changes, managing enrollment waitlists, document collection and verification, program participation dates, track project specific communications and multi-stage approvals. Capability to integrate with other software systems via API or other industry-standard methods.
- d. **Incentive Management** – payment history and audit tracking, incentive calculation based on program rules, milestone-based payment tracking, budget and remaining funds tracking, event participation and performance tracking, invoice/incentive template. Ability to include projects on incentive report based on project status.

2. Functional Requirements by Use Case:

a. Program Manager

- Program Setup – customized for the needs of each program
- Program Reporting (ability to query, export, view and customize dashboards)
- Define Process Workflow
- Allow for inputs/edit fields.

b. Program Administrator

- Review project documentation and inputs for Pre-Approval.
- Review project documentation and inputs for Project Completion and Incentive Payout.
- Draft the Incentive Release Document for Finance.
- Allow for inputs/edit fields.

c. Customer Support

- Access project data.
- Incentive status.

d. Third-Party User

- Allow for inputs/edit fields.
- Access to specific customer data based on account number input (or potential other customer identifiers).
- Submit Project Documentation and Inputs for Pre-Approval.
- Submit Project Documentation and Inputs for Project Completion and Incentive Payout.
- Monitor Payments.

e. Financial Analyst

- Access incentive payout template and process for payment

C. Public Affairs Department:

1. Background: The Public Affairs team is composed of three sections: Marketing and Communications, Community Engagement and Strategic Partnerships, which incorporates local government affairs. While the sections interact with each other frequently, each has unique needs as described in the use cases below.

2. Use Cases:

- Marketing:** As programs and rate offerings change, targeted campaigns to select customer segments becomes increasingly important. Community Power needs to be able to easily track campaign performance, map customer journeys, and manage customer interactions.
- Nonprofit relationship management:** Community Power has a “Power Network” comprising a variety of community-based organizations that serve the greater San Diego region and can be tapped for one-off work orders for services such as customer outreach or advocacy assistance. Community Power also has a Clean Energy Community Grant program where nonprofits both in and out

of the Power Network can compete for funding. Tracking these interactions will provide opportunities to take a more equitable approach to working with organizations throughout the region.

- c. **Public agency relationship management:** The Public Affairs and Legislative and Regulatory Affairs teams interact with a variety of public officials including elected officials, their staff members and the staff of their public agencies. Being able to track which Community Power staff member last interacted with which public offices and their staff will ensure smoother communication.

D. San Diego Regional Energy Network (SDREN) Operations:

1. **Background:** In 2025, Community Power will administer a suite of energy efficiency programs funded by the California Public Utilities Commission (CPUC) under the San Diego Regional Energy Network (SDREN). The SDREN program portfolio consists of ten programs that will be offered throughout San Diego County (including areas outside of Community Power service territory). The ten programs will be implemented by third-party vendors, who will be responsible for collecting program data utilizing their own systems, infrastructure and tools. As part of administering SDREN programs and operations, Community Power will require a distinct CRM environment separated from other Community Power initiatives to aggregate SDREN program data collected by third-party vendors as well as input and process accounting information; generate reports; and create dashboards.

2. Functional Requirements by Use Case:

a. Program Manager

- Import project data in xls, csv, or pdf format
- Edit fields
- Query reports based on selected fields and date ranges
- Generate and export reports to csv and xls
- Store project data by program
- View portfolio wide data in a dashboard (i.e. budget, energy savings) based on selected criteria (i.e. program year, sector, program, etc.)
- Ability to override or edit imported project data fields

b. Third-Party User/Implementer

- Import project data in xls, csv, or pdf format
- Edit fields
- Upload project documentation

- c. **SDREN Stakeholder/External Public User**
 - View dashboard of selected portfolio wide data or metrics
 - d. **SDREN Administration**
 - Input accounting information
 - Create budgets and dashboards
 - Generate and export reports
- E. **Platform Development and Deployment:**
 - Facilitate and recommend cloud and software provider.
 - Provide cost analysis of recommended solution.
 - Segmentation of the different Program instances within the enterprise-wide CRM solution to allow for participation and budget tracking for each specific program administered.
- F. **Technical Design and Architecture:**
 - Deliver a robust and scalable architecture.
- G. **Document technical design and architecture and provide it to Community Power.**
 - Leverage API driven architecture and modern design to deliver robust functionality.
- H. **Data Sources:**
 - Customer data (PII data, Demographic, usage, call logs).
 - Third-party implementer data feeds.
 - SDG&E provided customer data.
 - Customer outreach and communication data through website, IVR and Customer Service Representatives.
 - Solar and battery portal data.
- I. **Integration with current CCDM CRM Vendor:**
 - Third-Party data exchange and CRM to CRM integration.
- J. **Integration with Community Power's Enterprise Data Platform (EDP):**
 - Ingest from Community Power's EDP as needed once that solution has been developed and deployed.
 - Build integration to allow to upload data into EDP as needed.

K. Integration with Granicus GovDelivery

L. Operational Model and Support:

- Develop and deliver a support model for ongoing operations.
- Recommend staff needs for efficient ongoing operations.
- Deliver CRM access and administration model.

**ATTACHMENT B
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 C
COMMUNITY POWER SAMPLE PROFESSIONAL SERVICES AGREEMENT

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

ATTACHMENT D
PROPOSER SUBMISSION CHECKLIST

The following checklist outlines all items to be provided in response to this RFP. This is meant to be used as a tool to support you in the process. This checklist does not need to be submitted. Proposals should be submitted electronically to Community Power as a single PDF document using the online Proposal Submission Form by July 2, 2025.

Online Application Form Hyperlink: <https://wkf.ms/40A6Roj>.

- ☐ Cover Letter – Maximum two (2) pages
- ☐ Experience & Qualifications Narrative – Maximum 8 pages
- ☐ Proposed Approach Narrative – Maximum 5 pages
- ☐ Proposed Budget & Narrative – Maximum 3 pages
- ☐ Resumes & Professional Certifications – Maximum 3 pages per team member
- ☐ Applicable Engagements or References – Maximum 3 pages per applicable engagement or reference
- ☐ Eligibility for additional evaluation criteria points as allowed by Community Power's Procurement Policy – Maximum 1 page
- ☐ Supplemental Information – Maximum 2 pages

ATTACHMENT E

TECHNICAL AND CYBERSECURITY QUESTIONS

Please respond with appropriate detail to each section below. Please be as concise as possible and provide architectural diagrams to support your proposed solution.

1. **Data access and security:** What measures does the proposer have in place to ensure that the CRM platform has robust security to protect sensitive data from unauthorized access, theft, or loss?
2. **Compliance:** Please describe any experience complying with industry regulations and/or standards (HIPAA, GDPR, PCI DSS, CCPA, etc.).
3. **Operational Model:** Include a suggested operational model required to operationalize Community Power's CRM solution, taking into consideration the very distinct multiple internal stakeholder requirements and use cases in **Attachment A**.
4. **Cybersecurity:** Provide details on the cybersecurity features, including encryption, multi-factor authentication, and intrusion detection and prevention.