



SAN DIEGO COMMUNITY POWER

REQUEST FOR PROPOSALS

FOR

LOAD FORECASTING AND SCHEDULING COORDINATOR SERVICES

Date of Issuance: July 10, 2025

Submittals Due:

CATEGORY A Proposal Submission Deadline: August 7, 2025
CATEGORY B Proposal Submission Deadline: August 14, 2025

No. 25-009

SAN DIEGO COMMUNITY POWER
Load Forecasting and Schedule Coordinating Services

I. BACKGROUND AND INTRODUCTION

San Diego Community Power (“Community Power”), a Joint Powers Authority, is the default electricity provider for the Cities of Chula Vista, Encinitas, Imperial Beach, La Mesa, National City, and San Diego and the County of San Diego’s unincorporated areas. Community Power’s Joint Powers Agreement (“JPA”) is the first in California with the objective to achieve 100 percent renewable energy availability and usage by no later than 2035, which is in advance of current State targets. Community Power began service in 2021 and completed enrolling customers in 2024. This enrollment covered approximately 960,000 customer accounts. For more information, please visit Community Power’s website.¹ Proposers shall review Community Power’s Procurement Policy² and Inclusive and Sustainable Workforce Policy³ to ensure compliance when drafting proposals.

Through this RFP, Community Power is seeking proposals from qualified firms⁴ to provide load forecasting and scheduling coordinator services (the “Services”). These Services are sought in order to support Community Power’s mission of delivering reliable, clean, and competitively priced electricity to its customer. As Community Power continues to expand and diversify its power supply portfolio, the need for accurate forecasting, efficient scheduling, and optimized energy storage operations becomes increasingly critical.

Load forecasting is expected to begin in the fourth quarter of 2025. Community Power expects scheduling services to commence on April 1st, 2026.

Proposers may submit a proposal for Category A, Category B, or both Categories (as set forth below). Additionally, proposers may submit a proposal for any single or multiple tasks under each Category. **Proposers are not required to propose on all tasks or Categories.**

Proposers MUST identify the Category and task they are proposing on in Attachment C, Submission Checklist. If submitting to multiple Categories, the proposer must submit their proposal for that Category by the appropriate submittal deadline for each Category. **Each Category requires a separate submission.** Please refer to the links and deadlines identified for file submission in Section V of this RFP.

¹ www.sdcommunitypower.org

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

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

⁴ Use of the term “firm” throughout this document shall mean individual proprietorship, partnership, limited liability company, corporation (whether for profit or not-for-profit), joint venture, or other public or private entity duly existing and operating under California law or authorized to do business in California.

- **CATEGORY A: Load Forecasting Services**

Community Power offers retail electricity services, with approximately 8,000 gigawatt hours (“GWh”) of annual load. Community Power seeks load forecasting services to continue to improve the accuracy of Community Power’s day-ahead demand bids to the California Independent System Operator (CAISO) in the short-term. Community Power also seeks long-term services to strategically manage procurement strategies, reduce market exposure, and support integrated resource planning.

- Task 1: Short-Term Load Forecasting - Community Power is looking for a highly reliable and accurate Short-Term Load Forecasting tool or service to be used for daily forecasting of Community Power customer demand.
- Task 2: Long-Term Load Forecasting - Community Power is looking for an experienced and qualified provider of a Long-Term Load Forecast tool or service to support long-term power resource planning needs.
- Task 3: *Optional Compliance* - *This is an optional proposal opportunity to offer compliance submittal services. This optional task is available to proposers who are submitting to Task 1, Short-Term Load Forecasting Services.*

- **CATEGORY B: Scheduling Agent and Energy Storage Optimization Services**

Community Power is a registered CAISO Scheduling Coordinator and has its own Schedule Coordinator Identification (SCID). Community Power offers retail electricity services, with approximately 8,000 gigawatt hours (“GWh”) of annual load and procures fixed priced energy, resource adequacy, and renewable energy to meet its compliance and customer demand obligations.

Community Power is building a diverse portfolio of clean energy and storage resources and currently contracts for scheduling and optimization services using a third-party provider. Community Power aims to evaluate and secure best-in-class scheduling coordination and energy storage optimization solutions. These services are necessary to manage Community Power’s growing portfolio of clean energy and storage resources, ensure efficient participation in CAISO markets, and maximize the value of its power supply portfolio. By leveraging advanced scheduling, bidding, and optimization tools, Community Power seeks to improve operational efficiency, enhance market responsiveness, and support long-term sustainability goals.

Community Power seeks to evaluate separate scheduling and energy storage optimization options available, and contract for services to ensure the best value for Community Power’s growing portfolio.

- Task 1: Scheduling Coordinator Services.
- Task 2: Congestion Revenue Rights (“CRR”) Services
- Task 3: Energy Storage Optimization Software Services

Community Power resources: 2025-2026 timeframe (subject to adjustments)

| Resource Type | Expected COD | Battery Size | Solar Size (MW) | Pair Type |
|-----------------|--------------|----------------|-----------------|-------------|
| Battery | Online | 10MW / 20MWh | N/A | Stand-alone |
| Hybrid Import | Oct 2025 | 35MW / 140MWh | 42 MW | Hybrid |
| Solar + Storage | Oct 2026 | 70MW / 280MWh | 90 MW | Hybrid |
| Hybrid Import | Dec 2026 | 160MW / 640MWh | 160 MW | Hybrid |
| Solar + Storage | June 2027 | 35MW / 140MWh | 35 MW | Co-located |
| LDES | June 2027 | 60 MW / 480MWh | N/A | Stand-alone |

Additional power supply resources are planned for 2027 – 2028 forward

II. PROPOSAL SCHEDULE

The estimated timetable for this RFP is as follows:

| CATEGORY A LOAD FORECASTING SERVICES | |
|---|--|
| Description | Date |
| Release of RFP | July 10, 2025 |
| Pre-Proposal Meeting | July 17, 2025, at 2:30 p.m. PT |
| Questions Due | July 24, 2025, at 9:00 a.m. PT |
| Responses to Questions Provided | July 31, 2025 |
| Proposals Due | August 7, 2025, at 5:00 p.m. PT |
| Interviews | August 26, 2025 – August 29, 2025 |
| Notice of Intent to Award | September 2, 2025 |
| Board of Directors Approval | October 23, 2025 |
| Execution of Agreement | Upon Board Approval |
| Commencement of Work | November 2025 |

| CATEGORY B SCHEDULING AGENT AND ENERGY STORAGE OPTIMIZATION SERVICES | |
|---|--|
| Description | Date |
| Release of RFP | July 10, 2025 |
| Pre-Proposal Meeting | July 17, 2025, at 2:30 p.m. PT |
| Questions Due | July 24, 2025, at 9:00 a.m. PT |
| Responses to Questions Provided | July 31, 2025 |
| Proposals Due | August 14, 2025 at 5:00 p.m. PT |
| Interviews | September 3, 2025 – September 5, 2025 |
| Notice of Intent to Award | September 8, 2025 |
| Board of Directors Approval | October 23, 2025 |
| Execution of Agreement | Upon Board Approval |
| Commencement of Work | November 2025 |

The above schedule is tentative and subject to change at the sole discretion of Community Power. Nothing in this RFP shall be deemed to bind Community Power to award an agreement for the described Services, and Community Power retains the right to modify or cancel this RFP at any time.

III. PRE-PROPOSAL MEETING

Each Proposer is invited to attend an optional pre-proposal meeting to be held remotely on **July 17, 2025, at 2:30 p.m.** (Pacific Time). Failure to attend this meeting will not preclude a firm from submitting a proposal. Attendance at the pre-proposal meeting will ensure the proposer understands the full scope of the Services requested and RFP requirements.

IV. QUESTIONS AND RESPONSES

Proposers may submit questions regarding this RFP using the online form for the respective Category:

- [RFP 25-009 \(Category A\) - Questions Submission Form](#)
Questions for Category A - Load Forecasting Services are **due on July 24, 2025 by 9:00 a.m.** (Pacific Time).
- [RFP 25-009 \(Category B\) - Questions Submission Form](#)
Questions for Category B - Scheduling Agent and Energy Storage Optimization Services are **due on July 24, 2025 by 9:00 a.m.** (Pacific Time).

All questions must be received by the respective deadline identified above. 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. For questions after the Questions deadline, but regarding the procurement process ONLY, submit questions via email to neprocurement@sdcommunitypower.org.

Community Power will provide responses to questions as follows:

- Category A - Load Forecasting Services responses will be posted on July 31, 2025.
- Category B - Scheduling Agent and Energy Storage Optimization Services responses will be posted on July 31, 2025.

Community Power reserves the right to group similar questions when providing answers.

V. PROPOSAL SUBMISSION DEADLINE

Proposals should be submitted electronically to Community Power as a single combined PDF document (per category) using the online form for the respective category:

- [RFP 25-009 \(Category A\) - Proposal Submission Form](#)
Proposals for Category A - Load Forecasting Services are **due on August 7, 2025, at 5:00 p.m.** (Pacific Time).
- [RFP 25-009 \(Category B\) - Proposal Submission Form](#)
Proposals for Category B - Scheduling Agent and Energy Storage Optimization Services are **due on August 14, 2025, at 5:00 p.m.** (Pacific Time).

It is the sole responsibility of the proposer to ensure that the proposal is received before the submission deadline. Proposers shall bear all risks associated with delays in delivery. Any proposals received after the scheduled closing date and time for receipt of proposals may not be accepted.

VI. REQUEST FOR PROPOSALS

A. Scope of Services

The Services sought under this RFP are set forth in more detail in the contemplated scopes of work: **Attachment A, Attachment A-1, and Attachment A-2**, attached hereto and incorporated herein by reference. Notwithstanding the inclusion of such Services in **Attachment A, Attachment A-1, and Attachment A-2**, the final scope of Services negotiated between Community Power and the successful proposer(s) shall be set forth in the Professional Services Agreement (the "Agreement") executed by and between Community Power and the successful proposer(s). A copy of the Agreement can be found on Community Power's solicitations website as identified in **Attachment B**.

B. Content and Format of Proposal

Proposals shall be concise, well organized, and demonstrate qualifications, applicable experience, and the approach necessary to provide the tasks in **Attachment A and Attachment A-1 or Attachment A-2**, as applicable for the proposer. An **Attachment C** (Proposal Checklist) has been included in this RFP to assist proposers with preparing and submitting a complete proposal. **Attachment C** must be submitted with the Proposal.

Proposals should be submitted as a single combined PDF file (per category), in Calibri 12-pt font, be single-spaced with 1-inch margins and include the following items shown in this section and in the order listed all in a single combined PDF file (per category):

1. **Table of Contents: (Limit: 1 page)**
2. **Cover Letter⁵: (Limit: 2 pages)**
 - 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
 - f. The cover letter must clearly state the Category or Categories of services for which the proposer is submitting a response:
Category A
Category B
Both Categories
3. **Experience & Qualifications Narrative: (Limit: 5 pages)** Provide an Experience and Qualifications Narrative that addresses the following:
 - a. The proposer’s experience delivering or coordinating the scope of work identified in **Attachment A and the applicable Attachment A-1 and/or Attachment A-2**, including the number of years of experience, types and sizes of clients, and approximate number of clients.
 - b. The proposer’s experience working with California Community Choice Aggregators (“CCAs”), working within the energy regulatory landscape, or working with California Investor-Owned Utilities.

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

- c. The proposer's experience providing program management for load forecasting and scheduling coordinator services and working directly with program participants or customers participating in these programs.
- d. To the extent that a proposer lacks specific expertise in any of the areas described in **Attachment A and the applicable Attachment A-1 and/or Attachment A-2**, a professional team of subcontractors or associate firms should be assembled by the proposer to complement their technical expertise. Please include any subcontractors that will support the delivery of the proposed solution described in **Attachment A and the applicable Attachment A-1 and/or Attachment A-2**.
- e. A high-level organizational structure of the team or organizational chart with all proposed team members.

4. **Proposed Approach Narrative: (Limit: 8 pages)** Provide a Proposed Approach Narrative that addresses the following:

- a. The proposed approach to meeting the capabilities and tasks described in **Attachment A and the applicable Attachment A-1 and/or Attachment A-2** and the collaborative approach to working with Community Power.
- b. Identify the methods to be used in the completion of and/or carrying out the capabilities and tasks described in **Attachment A and the applicable Attachment A-1 and/or Attachment A-2**.
- c. Explain common implementation challenges and how your firm will work with Community Power to resolve those challenges.
- d. Include services deemed relevant to the successful accomplishment of the contemplated scope of work described in **Attachment A and the applicable Attachment A-1 and/or Attachment A-2**.

5. **Proposed Budget & Narrative: (Limit: 3 pages)** Provide a Budget & Narrative that addresses the following:

- a. Provide the total cost for the proposer to deliver the contemplated scope of work described in **Attachment A and the applicable Attachment A-1 and/or Attachment A-2**, account for all contractor labor, overhead, materials, travel, subcontractor expenses, and any other costs necessary to fully execute the scope of work as described. The budget narrative should sufficiently summarize all proposed costs, describe key team members and subcontractor roles as applicable. Partial or incomplete cost submissions will not be considered responsive.
- b. Proposers should consider the following guidelines when submitting their proposed costs:
 - (i) Category A

- (a) *Optional Task 3* - Proposers may provide time and material rates for this work.

- (ii) Category B

- (a) Task 2 - Proposer may propose a performance-based revenue sharing fee structure for CRR services for Community Power's consideration. However, proposer must also include a flat CRR service fee for any performance-based structure to be considered. A performance-based structure will only be considered after Community Power's locational basis exposure is hedged.
- (b) Task 3 - Proposer may propose a performance-based revenue sharing contract structure for Energy Storage Optimization Services, however, proposer must also include a flat service fee to be considered. Performance-based revenue sharing will only be considered after Community Power's minimum monthly revenue requirements are met.

6. **Resumes and Qualifications: (Limit: 3 pages per team member)** Provide resumes and qualifications of the key personnel who will be responsible for delivering the contemplated scope of work identified in Attachment A and the applicable Attachment A-1 and/or Attachment A-2.

7. **Applicable Engagements or References: (Limit: 3 pages per applicable engagement or reference)** Provide brief summaries of three (3) engagements or references that are similar to the contemplated scope of work described in Attachment A and the applicable Attachment A-1 and/or Attachment A-2. See Attachment E for the Reference template that should be filled out and included along with the proposer's submission.

8. **Eligibility for Additional Evaluation Criteria Points (Bonus Points): (Limit: 2 pages per category below)**

- 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 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.

9. **Litigation:** Proposer must complete Attachment D, Litigation History section, to provide litigation history for any claims filed by the proposer or against the proposer related to the provision of any services in the last five (5) years.

10. **Conflicts of Interest:** Proposer must complete Attachment D, Conflicts of Interest section, to identify any potential conflicts of interest with other current or former clients, including, but not limited to, Sempra Energy, San Diego Gas & Electric (SDG&E), and affiliates thereof, and how they expect to resolve those conflicts.

C. Protests

1. **Protest Contents:** A proposer may protest an agreement 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 agreement award. Any protest submitted after 5:00 PM PT of the fifth (5th) business day after notification of the agreement 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 agreement award. The proposer's protest must include supporting documentation, legal authorities in support of the grounds for the protest and the name, 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 a 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 should 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 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 days from the proposal due date. Community Power intends to award the agreement within this time but may request an extension from the proposers to hold pricing, until negotiations are complete and the agreement 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 proposer(s) whose proposal most closely meets the requirements of this RFP. The agreement award, if any is awarded, will go to the proposer whose proposal best meets these requirements.

5. **Prevailing Wages:** If applicable, proposers shall be aware of the requirements of California Labor Code Sections 1720 et seq. and 1770 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.

F. Proposal Evaluations & 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 | Points Possible |
|----|--|------------------------|
| 1. | Proposer's qualifications and experience | 35 |
| 2. | Demonstration of past success | 25 |
| 3. | Proposer's approach to the services requested in Attachment A and the applicable Attachment A-1 or Attachment A-2 | 20 |
| 4. | Commercial Terms (Price) and Compliance with Community Power Contractual Terms | 20 |
| 5. | Bonus Points/Special Preferences (optional) | Up to 10 |
| | Total | 100-110 |

For a list of additional criteria, please see Section V.B.8.

1. Interviews: 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 agreement. Any interview may include discussions about services offered, conflicts of interests with other clients, or fees/compensation amount or structure. Interviews may take place through written correspondence, telephone or video conference, and/or face-to-face interviews, at 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.

2. Negotiation and Agreement: After a proposer(s) has been selected, Community Power will negotiate the Agreement for execution. The selected proposer may be asked to complete and execute a separate Non-Disclosure Agreement. If a satisfactory Agreement cannot be negotiated, Community Power may, at its sole discretion, begin agreement 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 an Agreement.

VII. RESERVATION OF RIGHTS

This RFP is a solicitation for proposals only and is not intended as an offer to enter into a agreement 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 agreement 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 agreement 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, or 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 agreement by Community Power. Community Power has the right to reissue the RFP at a future date.

VIII. 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 agreement 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 the proposer 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.

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

If it is discovered that the proposer contacted and received information through any means other than mediums used to share information about this RFP, 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 in accordance with the RFP Section IV, Questions and Responses.

X. 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 database⁶.

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 agreement 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.

XI. 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.

XII. ATTACHMENTS

Attachment A – Scope of Work

Attachment A-1 – Scope of Work: Category A

Attachment A-2 – Scope of Work: Category B

⁶ www.thesupplierclearinghouse.com

Attachment B – Sample Professional Services Agreement
Attachment C – Submission Checklist (Required Form)
Attachment D – Proposer Identification (Required Form)
Attachment E – Proposer References (Required Form)
Attachment F – Proposal Responses (Required Form)

ATTACHMENT A SCOPE OF WORK

The Scope of Services is delineated into two (2) separate Categories with respective tasks to be performed under each Category as follows:

- Category A – Load Forecasting Services
(See Attachment A-1 for the detailed scope of services for each task)
 - Task 1: Short-Term Load Forecasting
 - Task 2: Long-Term Load Forecasting
 - Task 3: (*Optional*) Compliance
- Category B – Scheduling Agent & Energy Storage Optimization Services
(See Attachment A-2 for the detailed scope of services for each task)
 - Task 1: Scheduling Coordinator Services.
 - Task 2: Congestion Revenue Rights (“CRR”) Services
 - Task 3: Energy Storage Optimization Software Services

Notes to Proposers:

- **Proposers may propose for any single task or multiple tasks within each Category.**
- **Proposers must identify the Category and Task(s) for which they are proposing in Attachment C.** Attachment C identifies the items required for each Category submission.
- **Proposers may propose on both Categories.**
 - A separate submission for each Category must be completed.
 - Refer to Section V of the RFP for each Category submission link and deadline.
 - For each Category, use Attachment C to identify the Category and task(s) being proposed on.

**ATTACHMENT A-1
SCOPE OF WORK: CATEGORY A
LOAD FORECASTING SERVICES**

The principal responsibility of the selected proposer(s) is to provide customer demand and load forecasting services that include, but are not limited to, the following:

A. TASK 1: Short-Term Load Forecasting Services

The selected proposer shall provide Community Power with load forecasting services, including, but not limited to, the following:

1. Short-term (Daily) forecast of Community Power hourly loads.

- 1.1. Each day, the selected proposer will generate an hourly weather adjusted fourteen (14) day load forecast using historic consumption data for Community Power, which may be refreshed throughout the day upon request.
- 1.2. The selected proposer shall coordinate with Community Power's in-house load forecaster to develop the forecast and make available the data inputs.
- 1.3. The load forecast represents expected aggregate energy consumption at the load aggregation point where Community Power submits daily demand bids.
- 1.4. The load forecast shall reflect weather forecasts from a minimum number of weather stations in San Diego County.
- 1.5. Note that Community Power does not have access to real-time supervisory contract and data acquisition ("SCADA") data and the provider will be required to use a combination of estimated settlement quality meter data ("ESQMD", T+8), actual settlement quality meter data ("ASQMD", T+48).
- 1.6. The selected proposer will provide weekly forecast error reports, including explanations and corrective actions for significant forecast deviations.
- 1.7. Methodology: The load forecast model/tool should leverage customer load data, weather data, and other data sources to produce an accurate hourly forecast of Community Power aggregate load.

| TASK 1 DELIVERABLES & TIMELINE | | |
|--------------------------------|---|-----------------------------|
| Anticipated Deliverable | | Anticipated Completion Date |
| 1 | Daily forecast of Community Power hourly loads: Generate an hourly weather-adjusted 14-day load forecast using historic consumption data. | Daily |
| 2 | Weekly forecast error report that includes explanations and corrective actions for significant forecast deviations. | Weekly |

| | | |
|---|--|---------------------------------------|
| 3 | Ensure Community Power reports and data inputs/outputs are operational for Community Power's third-party scheduling agent. | Prior to load forecasting start date. |
|---|--|---------------------------------------|

B. TASK 2: Long-Term Load Forecasting Services

The selected proposer shall provide Community Power load forecasting services, including, but not limited to, the following:

1. Long-term forecast of Community Power loads.

- 1.1. Annual and long-term electric retail sales forecast:
 - 1.1.1. Prepare and maintain Community Power customer and electric load forecasts including megawatt hours (MWh), megawatt (MW), monthly coincident peak MW, and hourly MW based on Community Power customer load profiles.
 - 1.1.2. Load forecast at the following load granularities: Total load (retail and loss-adjusted load (LAL)), load by customer class (retail and LAL), load by rate class (retail and LAL), retail on/off-peak and partial AM/PM, wholesale on/off-peak, coincident peak and coincident factor.
 - 1.1.3. Load forecasts should be presented at an hourly time granularity, with the option to aggregate up to daily and monthly levels.
- 1.2. The selected proposer shall coordinate with Community Power's in-house load forecaster to develop the forecast and make available the data inputs.
- 1.3. The selected proposer shall update long-term forecasts as necessary to maintain accuracy, and no less than twice yearly. Community Power reviews forecasts monthly and prefers forecasts updated quarterly.
- 1.4. The load forecast is expected to include sensitivity and statistical analysis based on historic weather and customer loads.
- 1.5. As needed, the selected proposer shall assist in preparing demand forecasts related to Community Power compliance filings.
 - 1.5.1. Load forecast outputs should support formatting requirements for the following, but not limited, purposes:
 - 1.5.1.1. CEC's Integrated Energy Policy Report (IEPR) forecast
 - 1.5.1.2. CPUC's Resource Adequacy (RA) compliance forecasts
 - 1.5.1.3. Renewable Portfolio Standard (RPS) requirements
 - 1.5.1.4. Community Power's internal position, cost, revenue and financial models

- 1.6. Methodology: The load forecast should leverage customer load data, weather data, and other data sources to produce a load forecast that is reviewed monthly and updated as needed but not less than every six months.

| TASK 2 DELIVERABLES & TIMELINE | | |
|--------------------------------|--|--|
| | Anticipated Deliverable | Anticipated Completion Date |
| 1 | Annual and long-term forecast of Community Power customer loads. | Long-term forecasts provided no less than every six months, and on request, over the duration of the Service. |
| 2 | Load Forecast updates and reporting over the duration of the Services. | Long-term forecasts provided no less than every six months, and on request, over the duration of the Services. |
| 3 | Completion of set up for data exchange with Community Power's internal systems | Long-term forecasts provided no less than every six months, and on request, over the duration of the Services. |

C. OPTIONAL TASK 3: Forecast Compliance Services

(Optional Add-On for Proposers Submitting to TASK 1 – Short-Term Load Forecasting)

This is an optional proposal opportunity to offer compliance submittal services. This task is available to proposers who are submitting to Task 1, Short-Term Load Forecasting Services.

Proposals submitted for this Task 3 may not be considered as part of the standard evaluation process. If a vendor is awarded an agreement for Task 1 services, award of the Optional Task 3 services may be negotiated as part of the award.

Provide forecast-related compliance filings to the CEC, CPUC and other agencies as required and requested by Community Power. Compliance filings may include, but are not limited to, the following frequency, but are subject to change:

1. CEC's IEPR due biennially
2. CPUC's RA peak load submittal due annually
3. SDG&E's ERRR forecast due annually

ATTACHMENT A-2
SCOPE OF WORK: CATEGORY B
SCHEDULING AGENT AND ENERGY STORAGE OPTIMIZATION SERVICES

The principal responsibility of the selected proposer(s) is to provide a range of scheduling services that include, but are not limited to, the following:

A. TASK 1: Scheduling Coordinator Services

The selected proposer shall perform scheduling coordinator duties on behalf of Community Power in the CAISO markets, and act as Community Power's agent to coordinate scheduling and dispatch of Community Power's contracted power supply resources, providing services that include, but are not limited to, the following:

1. Scheduling Coordinator Services.

- 1.1. 24/7 day ahead and real time operations. Provide seven (7) day, twenty-four (24) hour day-ahead ("DA") and real-time ("RT") monitoring, bidding, and outage management with the CAISO for Community Power's scheduling coordinator ID ("SCID").
- 1.2. Submit demand bids to the CAISO markets. The selected proposer will submit demand bids daily to the CAISO to meet Community Power's forecasted load requirements and instructions. The selected proposer will have the ability to receive and schedule a Community Power-provided, or a Community Power-authorized third-party-provided load forecast. The selected proposer system will have the ability to receive the forecast automatically via an application programming interface ("API") and through manual intervention via a mutually agreed-upon method. The selected proposer will have a process to validate accurate submittals into the CAISO market.
- 1.3. Resource operations in CAISO. The selected proposer will manage new power resource onboarding and all resource scheduling activities necessary to integrate Community Power's contracted power supply into the CAISO markets. Contracted resources include contracts with power suppliers, generators, storage facilities, and/or demand response or other aggregated or virtual resources. This includes coordinating with the resource owner and coordinating with Community Power to complete CAISO onboarding of resources through CAISO's New Resource Implementation ("NRI") process. Including on-going coordination directly with resource operators for the submittal of resource availability and unit outages to CAISO and resolving real-time issues between the resource operations and CAISO.

- 1.3.1. Proposer will submit monthly and annual resource supply plans and resource adequacy plans to CAISO.
 - 1.3.2. Proposer will notify Community Power in a timely manner if any planned outage requires substitution, or contract for substitution as needed.
- 1.4. Submit supply schedules. The selected proposer will submit Inter-SC Trades ("ISTs"), import schedules, prepare North American Electric Reliability Corporation ("NERC") e-Tags, and manage the e-Tags as needed due to transmission constraints or outages from delivery to sink.
 - 1.4.1. Proposer will monitor Community Power's e-tags and imports to confirm final volumes and report on any RT curtailment of Community Power power supply portfolio resources.
- 1.5. Submit supply bids to the CAISO markets (both economic and self-schedule). The selected proposer will submit economic and self-schedule bids into the CAISO markets in accordance with Community Power's bidding strategies. This includes monitoring resource, market, weather, and pricing conditions and rebidding standalone, co-located, and hybrid energy storage to align with bidding strategies. The selected proposer will have a process to validate accurate submittals into the CAISO market.
- 1.6. SC Meter Entity ("SCME") services. The selected proposer will monitor, validate, and submit select resource's settlement quality meter data timely to CAISO daily, and replacement meter data as required.
- 1.7. CAISO market changes. The selected proposer will monitor CAISO market changes and inform Community Power about CAISO's impacts on the provider and the wholesale market. The selected proposer will update its systems and processes as needed to implement the CAISO market changes before the market changes have gone live in CAISO's production environment.

2. Deal Capture Services.

- 2.1. Deal Capture. Community Power will record all executed contracts into its internal Deal Capture system. The selected proposer must have a process to ensure accurate and complete bidding and scheduling of Community Power load and resources.

3. Reporting and Data Services.

- 3.1. Storing and retrieving data. All CAISO data, Community Power contract data and related supplier data, and any other data utilized for Community Power services

must be available for Community Power to retrieve on demand via API or by accessing a backend database.

- 3.2. CAISO market and asset reporting. The selected proposer will provide regular reporting (daily, weekly, and monthly) on the performance and availability of Community Power's resource portfolio and CAISO market activity, including hourly day-ahead and real-time load and generation volumes and prices and market performance. The selected proposer must be capable of delivering custom reports as requested to be used for resource monitoring and settlement purposes.
- 3.3. Compliance reporting. The selected proposer will provide E-Tag summary data for California Air Resources Board Mandatory Reporting Regulations ("CARB MRR") Annual Reports and other compliance reports. The selected proposer must be capable of delivering on-demand custom reports for other compliance reporting requirements.

4. Miscellaneous Services.

- 4.1. Business resiliency. The selected proposer will develop processes and protocols consistent with industry standards to ensure critical operations are maintained during emergency events. This includes documented disaster recovery plans, backup systems, and cybersecurity compliance.
- 4.2. Transition period. If applicable, the selected proposer will perform any startup SC functions during the Transition Period from Community Power's previous SC service provider. The selected proposer will be expected to have an environment for Community Power to perform user acceptance testing ("UAT") at least forty-five (45) days before the SC cutover date. The selected proposer will prepare a detailed work plan describing all activities and deliverables, including milestone dates and data or process requirements for Community Power.
- 4.3. Performance metrics and service level agreements ("SLAs"). The selected proposer will define clear SLAs for response times, accuracy, and availability, including 99.9% system uptime. The selected proposer will implement key performance indicators ("KPIs") to measure the quality of services, such as load forecast accuracy percentages, data entry accuracy percentages, issue resolution rates, timeliness of reporting, and any additional KPIs requested by Community Power for monitoring. The selected proposer will notify Community Power of changes in systems or reports that may impact services at least thirty (30) days before implementation. Community Power reserves the right to terminate services with thirty (30) days' notice for unsatisfactory performance after a performance improvement plan.
- 4.4. Data security and continuity. The selected proposer must ensure compliance with CAISO, California Public Utilities Commission ("CPUC"), Federal Energy Regulatory

Commission (“FERC”), and other state and federal regulations for secure storage, handling, and transmission of sensitive data, including maintaining robust cybersecurity and disaster recovery plans.

| TASK 1 DELIVERABLES & TIMELINE | | |
|---|---|------------------------------------|
| Anticipated Deliverable | | Anticipated Completion Date |
| 1 | Business resiliency, cybersecurity, and disaster recovery plans completed and shared with Community Power as set forth in Task #1, subsections 4.1 and 4.4. | December 1, 2025 |
| 2 | Completion of systems setup to provide all Services set forth in Task #1. | January 9, 2026 |
| 3 | Completion of User Acceptance Testing to demonstrate that Community Power’s portfolio has been correctly set up as per Task #1, subsections 1 and 2. | January 30, 2026 |
| 4 | Validate all manual overrides and uploads listed in Task #1, subsections 1.2 and 1.5. | January 30, 2026 |
| 5 | Ensure Community Power reports and data retrieval via API are operational as per Task #1, subsection 3. | February 16, 2026 |
| 6 | Completion of transition period activities according to workplan as set forth in Task #1, subsection 4.2 above. | February 28, 2026 |

B. TASK 2: Congestion Revenue Rights (“CRR”) Services

The selected proposer shall provide CRR services, including, but not limited to:

1. CRR Bid Strategy Development and Implementation.

- 1.1. The selected proposer will manage the annual and monthly CRR nomination and auction processes on behalf of Community Power. The selected proposer will consult with Community Power to select CRRs to nominate and to participate in buying and selling CRR auction transactions to achieve hedging goals. Proposers may propose services to recommend CRR nominations and auction strategy, congestion forecasting methodologies, models and/or resources used to make these recommendations. Proposers must demonstrate proficiency in working with CAISO’s Full Network Model and update timelines to produce accurate congestion forecasts. The selected proposer will prepare and submit Community Power’s CRR nominations, offers, and bids. Results of CRR analyses performed will be made available to Community Power in a mutually agreeable format, supported by market analysis.

2. CRR Portfolio Performance.

2.1. The selected proposer will deliver monthly reports and presentations on Community Power's CRR portfolio performance, including CRR revenue forecasts. The provider will also provide graphical interfaces or on-demand reports for transaction monitoring. The provider will review all settlement statements and invoices associated with CRRs for accuracy and ensure CRR credit requirements are met. The selected proposer will review and provide input on Community Power's CRR Risk Management Policy upon request.

2.1.1. Proposer should provide after-the-fact performance and settlement reporting for annual and monthly CRR processes.

| TASK 2 DELIVERABLES & TIMELINE | | |
|--------------------------------|--|---|
| Anticipated Deliverable | | Anticipated Completion Date |
| 1 | Monthly allocation process data sheets for nomination preparation according to agreed upon strategy. | Tier 1 - Delivered at least two (2) days prior to Tier 1 submission date. Tier 2 – Delivered the business day immediately following the publication of Tier 1 allocation results. |
| 2 | Monthly auction process data sheets for offer and bid preparation according to agreed upon strategy. | Delivered no later than the business day immediately following the publication of Tier 2 allocation results. |
| 3 | Annual allocation process data sheets for nomination preparation according to agreed upon strategy. | Tier 1 & Tier 2 - Delivered two (2) weeks prior to Tier 1 submission date. Tier 2 Update – Delivered two (2) business days following the publication of Tier 1 allocation results. Tier 3 – Delivered two (2) business days following the publication of Tier 2 allocation results. |
| 4 | Annual auction process data sheets for offer and bid preparation according to agreed upon strategy. | Delivered at least two (2) business days immediately following the publication of Tier 3 allocation results. |
| 5 | Long-term, annual, and monthly nomination submission service. | Provided on the business days that nominations are due for both the Monthly and Annual processes. |
| 6 | Monthly and annual auction offers and bids submission service. | Provided on the business days auction bids and offers are due for both Monthly and Annual processes. |

| | | |
|---|--|---------|
| 7 | After-the-fact performance and settlement reporting on both monthly and annual allocations and auctions. | Monthly |
|---|--|---------|

C. **TASK 3: Energy Storage Optimization Software Services**

The selected proposer shall provide energy storage optimization software services. Community Power is seeking to procure and implement a cloud software solution to support energy storage optimization and bidding. Community Power may consider optimization of energy storage assets with scheduling coordinator services in Task #1 if services are unbundled from resource bidding and scheduling. Proposers should provide a detailed explanation of energy storage optimization capabilities, including, but not limited to, the following:

- 1. Compliance-aware bidding.** Ensure required resource adequacy (“RA”) volumes are consistently bid while optimizing for market conditions.
- 2. Outage-aware adjustments.** Direct integration with CAISO’s Outage Management System (“OMS”) to incorporate real-time operating limitations into bid strategies.
- 3. Market research and adaptability.** Dedicated resources for monitoring CAISO market reforms and updating bidding strategies accordingly.
- 4. Price forecasting and tiered bidding.** Capability to forecast day-ahead market (“DAM”), fifteen-minute market (“FMM”), real-time market (“RTM”), and ancillary services (“AS”) prices, constructing tiered bid curves that align with SDCP’s risk and revenue strategies.
- 5. User interface and override capabilities.** A platform where Community Power can review bids, view predicted schedules, and, if needed, submit alternative bid strategies or overrides.
- 6. Risk and strategy customization.** The ability to define risk parameters or bidding strategies within the software to align with Community Power’s portfolio objectives.

| TASK 3 DELIVERABLES & TIMELINE | | |
|---|--|------------------------------------|
| Anticipated Deliverable | | Anticipated Completion Date |
| 1 | Provide a storage operations and bidding monitoring dashboard. | February 28, 2026 |
| 2 | Provide a storage bidding manual override interface. | February 28, 2026 |
| 3 | Deliver interval-level reporting data for storage awards and net revenues. | February 28, 2026 |
| 4 | Provide Storage Forecasted and Actual profit & loss output and report. | Monthly |

ATTACHMENT B
SAMPLE PROFESSIONAL SERVICES AGREEMENT

Community Power's Sample Professional Services 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 C
SUBMISSION CHECKLIST**

A. Category/Task Submission Identification

Instructions: **For each Category** that you are submitting a proposal to, mark the Category and task(s) you are proposing on. **Each Category requires a separate submittal** using the respective links below.

| CATEGORY | TASK |
|--|--|
| <input type="checkbox"/> Category A – Load Forecasting | <input type="checkbox"/> Task 1 – Short-Term Forecasting <input type="checkbox"/> Task 2 – Long-Term Forecasting <input type="checkbox"/> Task 3 – <i>Optional</i> Compliance Submittals |
| <input type="checkbox"/> Category B – Scheduling Coordinator | <input type="checkbox"/> Task 1 – Scheduling Coordinator <input type="checkbox"/> Task 2 – CRR Services <input type="checkbox"/> Task 3 – Optimization Software |

B. Submission Checklist

Instructions: **For each Category** that you are submitting a proposal to, your submittal must include the following items (submitted in the order below) as one combined PDF document (per category):

- ☐ Table of Contents
- ☐ Cover Letter – Limit: 2 pages
- ☐ Experience & Qualifications Narrative – Limit: 5 pages
- ☐ Proposed Approach Narrative – Limit: 8 pages
- ☐ Proposed Budget & Narrative – Limit: 3 pages
- ☐ Resumes & Professional Certifications – Limit: 3 pages per team member
- ☐ Applicable Engagements or References – Limit: 3 pages per applicable engagement or reference
- ☐ Eligibility for Bonus Points – Limit: 2 pages per bonus category

C. Proposal Submission

Proposals should be submitted electronically to Community Power as a single PDF document using the online Proposal Submission Form as follows:

[RFP 25-009 \(Category A\) - Proposal Submission Form](#)

Proposals for Category A are **due on August 7, 2025, at 5:00 p.m.** (Pacific Time).

[RFP 25-009 \(Category B\) - Proposal Submission Form](#)

Proposals for Category B are **due on August 14, 2025, at 5:00 p.m.** (Pacific Time).

**ATTACHMENT D
PROPOSER IDENTIFICATION**

| | |
|--|---|
| Legal Business Name | |
| Parent Company Name (if any) | |
| Business Address | |
| Business type: | <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Limited Liability Corporation <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Other: _____ |
| California Business License Number | |
| Proposal Point of Contact | Name: Title: Address: Phone: Email: |
| Authorized Signatory | Name: Title: Email: |
| Litigation History Provide litigation history for any claims filed by the Proposer or against the Proposer related to the provision of any services in the last five (5) years. | |
| Conflicts of Interest Proposer must identify any potential conflicts of interest with other current or former clients, including, but not limited to, Sempra Energy, San Diego Gas & Electric (SDG&E), and affiliates thereof, and how they expect to resolve those conflicts. | |

**ATTACHMENT E
PROSPECTIVE PROPOSER REFERENCES**

Proposer's Name: _____

List three (3) References where the same or similar scope of services were provided in order to meet the Minimum Requirements stated in this solicitation.

| | | | |
|----------|------------------------------------|-----------------------------------|------------------------|
| 1 | Firm/Organization Name | Address | Type of Service |
| | | | |
| | | | |
| | Project Title / Contract No | # of Years / Contract Term | Dollar Amount |
| | | | |
| | Contact Person | Phone | Email |
| | | | |
| | | | |
| 2 | Firm/Organization Name | Address | Type of Service |
| | | | |
| | | | |
| | Project Title / Contract No | # of Years / Contract Term | Dollar Amount |
| | | | |
| | Contact Person | Phone | Email |
| | | | |
| | | | |
| 3 | Firm/Organization Name | Address | Type of Service |
| | | | |
| | | | |
| | Project Title / Contract No | # of Years / Contract Term | Dollar Amount |
| | | | |
| | Contact Person | Phone | Email |
| | | | |
| | | | |

ATTACHMENT F PROPOSAL RESPONSES

Instructions: For each Category and task that you are submitting a proposal to, the proposer must provide detailed responses to the respective response requirements for that respective Category and task(s) as listed below. Preferably, the proposer should provide responses in this Attachment F. Alternatively, the proposer may identify the exact area(s) in their proposal where this information is addressed for each applicable item for the respective Category and task(s).

CATEGORY A – Load Forecasting Services

TASK 1 – Short Term Load Forecasting Services

1. Proposers should describe their load forecasting methodology and required data sources used to generate short-term load forecasting.
2. Proposers must describe their process and experience; this includes describing how data coordination with customer and a third-party scheduling agent happens and any timing constraints the proposer has.
3. Proposers should describe frequency of forecast updates. Include typical latency between data input and forecast availability.
4. Proposers should describe how they ensure the security and confidentiality of customer load data.

TASK 2 – Long-Term Load Forecasting Services

1. Proposers should describe their load forecasting methodology, including how you model customer growth, electrification, and climate impacts.
2. Proposers should describe their experience providing Long-Term Load Forecasting and the process for integrating with their customer internal systems.
3. Proposers should describe their levels of granularity and outputs (e.g., customer class, rate class, hourly/monthly) and how they support forecasts.
4. Proposers should describe how frequently they can update forecasts. Proposers should identify if they can accommodate ad hoc update requests and identify any limits to these requests.
5. Proposers should describe the types of scenarios or sensitivity analyses they offer (e.g., weather, economic, DER adoption).

CATEGORY B – Scheduling Coordinator Services

TASK 1 - Scheduling Coordinator Services

1. Scheduling Coordinator Services.
 - a. Proposers should describe the requirements and process of bidding in forecasted load from a Community Power-provided or Community Power-authorized third-party-provided forecast, this includes what audits and controls are in place to prevent errors, and any timing requirements to submit the bids to the CAISO on time. (Refer to Subtask 1.2)
 - b. Proposers should describe the requirements and process of receiving and submitting economic and self-schedule bids. This includes describing any timing or formatting requirements, what audits and controls are in place to prevent unauthorized bids, and any timing requirements to get the bids submitted to CAISO on time. (Refer to Subtask 1.5)
 - c. Proposers should describe their experience and capabilities in energy storage resource bidding and operations in the CAISO market, including standalone, co-located and hybrid energy storage assets. (Refer to Subtask 1.5)
 - d. Proposers should describe their process for onboarding new resources into CAISO, including NRI coordination and required communication.
2. Deal Capture Services.
 - a. Proposers should describe the required Deal Capture outputs, and any process and timing requirements. (Refer to Subtask 2.1)
3. Reporting and Data Services.
 - a. Proposers should describe the types of data being pulled into their systems and how customers currently access the data. (Refer to Subtask 3.1)
 - b. Proposers should describe market, and asset reports available to Community Power, how Community Power can access reports and associated asset data, and include proposed communications for any unplanned asset availability changes. (Refer to Subtask 3.2)
4. Miscellaneous Services.
 - a. Proposers should describe how long a transition period would be, what would be required for a successful transition, and any lessons learned from previous transitions. (Refer to Subtask 4.2)
 - b. Proposer should clearly describe performance metrics, including response times, scheduling accuracy, and applicable KPIs that Community Power can expect. (Refer to Subtask 4.3)

TASK 2 - CRR Bid Strategy Development and Implementation

1. Proposers should provide a description of their CRR analytical tools as part of their Proposal. (Refer to Subtask 1.1)
2. Proposers should describe their CRR timing requirements and process.

TASK 3 - Energy Storage Optimization Software Services

1. Proposers should describe their experience optimizing and bidding standalone, co-located, and hybrid storage resources in CAISO markets, as well as their approach to integrating with scheduling coordinators. (Refer to Subtask 6.1)

This should include:

- a. The software's ability to interface with scheduling systems.
 - b. The process for bid submission and any timing constraints.
 - c. How the data coordination occurs between the proposer, Community Power, and third-party scheduling agent.
 - d. Regular review of optimization and strategy performance.
2. Proposers should describe the tools available for Community Power staff to review or override bid strategies.
 3. Proposers should describe the KPIs used to track storage asset performance and how they are reported.