



**SAN DIEGO COMMUNITY POWER
INVITATION TO BID
NO. 26-006
FOR EVALUATION, MEASUREMENT, AND VERIFICATION
OF SOLAR BATTERY SAVINGS PROGRAM**

San Diego Community Power (“SDCP”) is seeking bids to this Invitation to Bid (“ITB”) from qualified and experienced professionals to provide independent evaluation, measurement, and verification (“EM&V”) services for the Solar Battery Savings (“SBS”) Program (“Bids”).

I. INTRODUCTION

SDCP 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 which serves the unincorporated area (collectively, “member agencies”). SDCP’s Joint Powers Agreement (“JPA”) is the first in California with the objective to achieve and sustain 100 percent renewable energy availability and usage by 2035, which is in advance of current State of California targets. For more information, please visit SDCP’s website at www.sdcommunitypower.org.

II. PROJECT BACKGROUND

SDCP seeks to evaluate, measure, and verify the bill impacts for participants of its Solar Battery Savings Pilot Program (“Pilot Program”). Participants of the Pilot Program received an upfront equipment rebate in exchange for participation in events every weekday that discharge their battery(ies) during the on-peak periods between 4-9 PM. During the events, the batteries discharge 50% of their usable energy storage capacity (kWh), discharging to the home first and then to the grid when there is excess capacity available. Currently, approximately 1,440 batteries are enrolled in the Pilot Program. Enrollments in the Pilot occurred between Q4 of Calendar Year 2024 and Q4 of Calendar Year 2025 and include a variety of products from various manufacturers.

The Pilot Program is funded by SDCP and implemented in collaboration with SDCP’s Distributed Energy Resource Management System (“DERMS”) service provider and the battery manufacturers. The selected Bidder will provide independent impact EM&V services to quantify the bill impact for Pilot Program participants.

SDCP is seeking to contract with the selected bidder of this ITB to provide the EM&V scope of services identified in Exhibit A. SDCP expects the EM&V services to commence on or around April 20, 2026 and be completed by September 25, 2026 (“Project Period”). SDCP expects initial results of the EM&V services to be completed by July 31, 2026.



SDCP does not expect the cost for all services completed under this procurement to exceed \$150,000.

III. QUESTIONS AND RESPONSES

Bidders may submit questions regarding this ITB electronically to SDCP.

Questions must be submitted using the online form: <https://wkf.ms/473JVSf>.

Questions are due on March 12, 2026 by 12:00 P.M. (Pacific Time).

Responses to questions will be provided by March 19, 2026.

When submitting questions, please specify which section of the ITB 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 Bidder or, due to unclear instructions, may result in SDCP not receiving the best possible responses from Bidder.

For questions after the Questions deadline, and ONLY regarding the procurement process, bidders may submit questions via email to kcarranza@sdcommunitypower.org with a copy to nep@sdcommunitypower.org.

IV. BID SUBMISSION DEADLINE

Bids should be submitted electronically to SDCP as **a single PDF document**.

Bids must be submitted using the online form: <https://wkf.ms/3MWwjBk>.

Bids are due on March 26, 2026 at 12:00 P.M. (Pacific Time).

It is the sole responsibility of the Bidder to ensure that their bid is received before the submission deadline. Bidders shall bear all risks associated with delays in delivery. Any Bids received after the scheduled closing date and time for receipt of bids may not be accepted.

V. REQUEST FOR BIDS

A. Scope of Services

The Scope of Services are detailed in Exhibit A.

B. Content and Format of Bid

1. Bidder Information: Complete **Exhibit B** to provide the name, address, telephone number of the principal contact or contacts from the Bidder and any additional subconsultant needed to complete the services.



2. Qualifications and Experience:

a. Summary: (**Limit: 3 pages**) Provide a short description of the proposed team's professional qualifications and experience demonstrating their ability to fulfill the Scope of Services. Include the following:

- 1) The qualifications and key personnel should speak to relevant experience with the California Community Choice Aggregation ("CCA") or energy regulatory landscape or utility experience.
- 2) To the extent that a Bidder lacks specific expertise in any of the areas described in the scope of services, a professional team of subcontractors or associate firms should be assembled by the Bidder to complement their technical expertise. Please include identify any subcontractors that will support one or more of the service areas described in the Scope of Services.

b. Proposed Team: (**Limit: 2 pages**) List all individuals of the proposed team, including any subconsultants. Identify their roles in completing the Scope of Services and their specific qualifications and relevant experience. (**Resumes may be included as an appendix and will not be counted towards page limits**).

c. References

- 1) Complete **Exhibit C** to provide a list of three (3) relevant projects/experiences completed by the Bidder in the past three (3) years that demonstrate completion of a comparative scope of services. Include the name of the entity, size and industry of the entity. For each relevant project/experience listed, provide the name, email address, and telephone number for the primary contact person or project manager that the Bidder worked with at the entity.

3. Bidder's Approach: (**Limit: 5 pages**) Please provide the following information:

- a. Describe the proposed approach to delivering the scope of services and your collaborative approach with SDCP.
- b. Describe your proposed evaluation and verification methodology as well as any important project management elements that will be used to ensure the scope of services is completed in to meet SDCP's expected timeline.



Bidders may identify any concerns and/or alternative timelines proposed to meet the Scope of Services.

- c. Provide a high-level schedule that includes the time required for each step. Identify any milestones and deliverables for each step.
- d. Identify the methods, systems and/or tools to be used in the completion of the scope of services.
- e. Bidders may include other services deemed relevant to the successful completion of the scope of services.

4. Proposed Fee Schedule

a. Complete **Exhibit D** to provide the following:

- 1) For **Tasks 1-3**: Provide a fixed fee rate schedule to complete the Scope of Services as identified for Tasks 1-3 in Exhibit A. Include any assumptions and exclusions.
- 2) For **Optional Task 4**: Provide a fixed fee rate schedule for all items listed in accordance with the Scope of Services identified for Task 4 in Exhibit A. Include any assumptions and exclusions.
- 3) Additionally, Bidders may identify any additional costs or rates that may apply to complete the scope of services. Bidders should provide justification for any additional costs proposed.

C. Bid Requirements

- 1. General: It is strongly recommended that the Bidder submit Bids in the format identified in Section V.B to allow SDCP to fully evaluate and compare the bids. All requirements and questions in the ITB should be addressed and all requested information should be supplied.

SDCP reserves the right to request additional information which, in SDCP's opinion, is necessary to assure that the Bidder'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. Required Documents and Information:

Bidder must submit the following:



- a. Exhibit B – Bidder Information
 - b. Exhibit C – Bidder References
 - c. Exhibit D – Fee & Rate Schedule
 - d. Qualifications and Experience (See Section V.B.2)
 - e. Bidder’s Approach (See Section V.B.3)
3. Authorization: The **Bid shall be signed in Exhibit B** by an individual, partner, officer or officers authorized to execute legal documents on behalf of the Bidder.

D. Bid Evaluations & Criteria

Bids will be reviewed and ranked by SDCP Staff. During the evaluation process, SDCP reserves the right to request additional information or clarification for responses to this ITB. Bids will be evaluated in accordance with the following evaluation criteria:

- Bidder’s qualifications and experience
- Bidder’s approach to the services
- Bidder’s fee & rate schedule

Following the initial evaluation, SDCP may select one Bidder or select a number of Bidders (with or without interviews); or conduct interviews with a “short list” of Bidders, consisting of those Bidders reasonably likely, in the opinion of SDCP, 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 SDCP’s sole discretion.

SDCP reserves the right to not convene interviews or discussions, and to make an award on the basis of initial Bids received. References may be contacted at any point in the evaluation process. After a Bidders has been selected, SDCP will negotiate a contract for execution. If a satisfactory contract cannot be negotiated, SDCP may, at its sole discretion, begin contract negotiations with the next qualified Bidder who submitted a Bid, as determined by SDCP. Bidders are further notified that SDCP may disqualify any Bidder with whom SDCP cannot satisfactorily negotiate a contract.

E. Protests

1. Protest Contents: A Bidder may protest a contract award if the Bidder believes that the award was inconsistent with SDCP Procurement Policy or if this ITB is not in compliance with applicable law. A protest may be submitted electronically via email to kcarranza@sdcommunitypower.org with a copy to



nep@sdcommunitypower.org within five (5) business days after receipt of notification of the contract award. Any protest submitted after 5:00 PM of the fifth business day after notification of the contract award will be rejected by SDCP as invalid and the Bidder's failure to timely file a protest will waive the Bidder's right to protest the contract award. The Bidder'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 Bidder for purposes of the protest. Any matters not set forth in the protest shall be deemed waived.

2. **SDCP Review:** SDCP will review and evaluate the basis of the protest provided the protest is filed in strict conformity with the foregoing. SDCP shall provide the Bidder submitting the protest with a written statement concurring with or denying the protest. Action by SDCP 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 Bidder'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.

F. Miscellaneous

1. **Exceptions Certification to this ITB:** In submitting a bid in response to this ITB, Bidder is certifying that it takes no exceptions to this ITB including, but not limited to, SDCP's Professional Services Agreement ("Agreement"). If any exceptions are taken, such exceptions must be clearly noted in the bid and may be reason for rejection of the Bid. As such, Bidder is directed to carefully review the terms of the ITB.
2. **Amendments to Bids:** No amendment, addendum or modification will be accepted after a Bid has been submitted to SDCP.

If a change to a Bid that has been submitted is desired, the submitted Bid must be withdrawn and the replacement Bid submitted to SDCP prior to the Bid due date and time.

3. **Price Validity:** Prices provided by Bidders in response to this ITB are valid for 120 days from the Bid due date. SDCP intends to award the contract within this time but may request an extension from the Bidders to hold pricing until negotiations are complete and the contract is awarded.
4. **Right to Negotiate and/or Reject Bids:** SDCP reserves the right to negotiate any price or provision, task order or service, accept any part or all of any Bids, waive



any irregularities, and to reject any and all, or parts of any and all Bids, whenever, in the sole opinion of SDCP, such action shall serve its best interests and those of SDCP ratepayers. The Bidders are encouraged to submit their best prices in their Bids, and SDCP intends to negotiate only with the Bidders whose Bid most closely meets SDCP's requirements and provides the best value to SDCP.

VI. RESERVATION OF RIGHTS

This ITB is a solicitation for Bids 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. SDCP may, at its sole discretion, accept or reject any or all Bids submitted in response to this ITB. In addition, SDCP may, at its sole discretion, only elect to proceed with contract negotiations for some of the services included in the Bid. SDCP further reserves the right to cancel this ITB at any time prior to contract award without obligation in any manner for Bid preparation, interview, fee negotiation or other marketing costs associated with this ITB. SDCP also reserves the right to waive minor errors and omissions or inconsequential disparities in Bids, request additional information or revisions to offers, and to negotiate with any or all Bidders. SDCP shall not be liable for any costs incurred by the Bidder in connection with the preparation and submission of any Bid.

SDCP has the right to amend the ITB, in whole or in part, by written addendum, at any time. SDCP 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 SDCP records indicate has received this ITB. Should such addendum require additional information not previously requested, failure to address the requirements of such addendum may result in the Bid being found non-responsive and not being considered, as determined in the sole discretion of SDCP. SDCP 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 SDCP. SDCP has the right to reissue the ITB at a future date.

VII. CONFIDENTIALITY AND PUBLIC RECORDS

Bids submitted in response to this ITB shall become the exclusive property of SDCP. **SDCP is subject to the California Public Records Act ("CPRA").** The Bid will become a matter of public record when contract negotiations are complete and when an agreement is executed by SDCP.

Exceptions to disclosure may be available to those parts or portions of Bids that are justifiably and reasonably exempted under the CPRA, such as trade secrets. **If a Bidder desires to exclude a portion of its Bid from disclosure under the California Public Records Act, the Bidder must prominently mark it "confidential" and state the specific provision in the California Public Records Act that provides the exemption as well as the factual basis for claiming the exemption.**



A blanket statement of confidentiality or the marking of each page of the Bid as confidential shall not be deemed sufficient notice of a CPRA exemption. A Bidder who indiscriminately and without justification identifies most or all of its Bid 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, SDCP is not in a position to establish that the information that a Bidder submits is exempt. If a request is made for information marked "Confidential," SDCP will provide Bidders who submitted the information with reasonable notice to seek protection from disclosure by a court of competent jurisdiction. SDCP 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

SDCP 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. Bidders are required to review all applicable conflict of interest laws. In addition, SDCP has adopted policies governing procurement. Bidders are advised to review all policies, including the Procurement Policy, available at: <https://sdcommunitypower.org/resources/key-documents/>.

The Bidder may not contact or receive information outside of this ITB process. If it is discovered that the Bidder contacted and received information from any other mediums used to share information about this solicitation specified above and under the process specified herein regarding this solicitation, SDCP may, in its sole discretion, disqualify the Bid from further consideration.

All contact regarding this ITB or any matter relating thereto must be in writing and submitted to kcarranza@sdcommunitypower.org with a copy to nep@sdcommunitypower.org. For question and bid submissions, please refer to Sections III and IV above for instructions on submitting those.

IX. NON-DISCRIMINATION

SDCP will not discriminate and will require its contractors to not discriminate on the basis of race, gender expression, gender identity, religion, national origin, ethnicity, sexual orientation, age, or disability in the solicitation, selection, hiring, or treatment of contractors, subcontractors, vendors, or suppliers. The successful Bidder shall provide equal opportunity for subcontractors to participate in subcontracting opportunities.



EXHIBIT A SCOPE OF SERVICES

The selected Bidder will be expected to provide independent evaluation, measurement, and verification (“EM&V”) services to quantify the bill impacts of the Pilot Program to inform future program design and marketing.

A. PURPOSE: Specifically, the EM&V services are expected to answer the following questions:

1. What were the bill impacts resulting from participation in the Pilot Program? Bill impacts include generation (CCA) impacts, transmission and distribution impacts, annual bill true-ups and programmatic incentives. This will require recreating program participant bills to model the following scenarios¹:
 - a. Baseline Bill: Remove the solar and storage system impacts to model the bill with only consumption (no generation).
 - b. Solar ONLY Optimized Bill: Include the solar system impacts.
 - c. Solar and Storage Optimized Bill: Include the solar and storage system impacts with non-program operations (e.g., Self-Consumption Mode and Time of Use (TOU) Mode)
 - d. Program Optimized Bill: Include the solar and storage system impacts with program participation including programmatic dispatches
2. How do bill impacts vary across the following customer segments/attributes:
 - a. Customers rates (e.g., TOU, DR, etc.)
 - b. Solar plan (Net Energy Metering (NEM) vs. Solar Billing Plan (SBP)) with consideration of export pricing variations based on enrollment year
 - c. Market rate vs. non-market rate customers²
 - d. Weather and location (i.e., climate zones)
 - e. Manufacturer and products

¹ The analysis will assume unchanged consumption behavior by participants across all scenarios

² Non-market rate customers include CARE/FERA customers and customers within Communities of Concern. Non-market rate customers received a higher upfront SBS incentive. All CARE/FERA SBP customers, regardless of participation in SBS, receive a \$0.11/kWh adder on their generation adders.



3. How did the hourly discharge window duration (2-hr to 4-hr) change the bill impacts comparing 2025 performance to available 2026 performance data?
4. Note: Solar Battery Savings is not subject to the cost-effectiveness test and calculations found in the Standard Practice Manual from the California Public Utilities Commission (“CPUC”). SDCP does not expect the selected Bidder to offer services related to CPUC cost-effectiveness test and calculations.

B. TASKS

The selected Bidder will be expected to perform the following tasks.

1. Task 1 - Project Planning & Kick-Off

- a. Develop and submit a detailed work plan that outlines proposed evaluation and verification methodology, schedules (Gantt format preferred), milestones, roles and responsibilities, meeting cadence, communication styles, and other important project management elements.
- b. Schedule and lead a virtual kick-off meeting with SDCP staff at a mutually agreeable date and time.
- c. Develop and submit to SDCP an agenda one (1) week ahead of the meeting.
- d. Submit to SDCP meeting notes, action items, and other materials within three (3) business days following the meeting.
- e. **Task 1 Deliverables:**
 - 1) Detailed workplan with requested information.
 - 2) Schedule and lead kick-off meeting.
 - 3) Kick-off meeting agenda one week before meeting.
 - 4) Summary of kick-off meeting notes and action items three (3) days after meeting.

2. Task 2 - Program-Level Review

- a. Acquire all data necessary for a comprehensive review and impact analysis of the Pilot Program.
 - 1) Participant billing data, site location, Pilot Program event participation data and all other relevant data will be provided by SDCP and its vendors.



- b. Clean and validate data, as necessary (e.g., rebuild the customer bills and validate sample sites across variety of customer billing rates)
- c. Document assumptions, limitations, representativeness and other information as needed.
- d. Define customer segments for the analysis, including:
 - 1) Customer rates (e.g., TOU, DR, etc.)
 - 2) Solar plan (NEM vs. SBP) with consideration of export pricing variations based on enrollment year
 - 3) Market rate vs. non-market rate customers
 - 4) Weather and location
 - 5) Manufacturer and products
- e. Calculate the load and bill impacts.
- f. Evaluate the impacts across the customer segments.
- g. Thoroughly explore any discrepancies discovered during the review, including validating models and assumptions.
- h. **Task 2 Deliverables:**
 - 1) Summary of data acquisition, cleaning, completeness, and validation.
 - 2) Final cleaned and validated dataset in Excel format.
 - 3) Summary of evaluation scope, depth, performance metrics, parameters, goals, methodology, assumptions, limitations, key decisions, and important information.
 - 4) Summary customer segmentation, count of customers per segment, and explanation of logic/methodology.
 - 5) Summary of load profiles, load impact calculations and models, bill impact models, charts, graphs and other data visualizations, and assumptions.

3. Task 3 - Final Report and Presentation

- a. Develop a Microsoft Word report and an accompanying Microsoft PowerPoint presentation that summarizes the findings into a clear and concise report for SDCP staff.



- 1) This report should provide sufficient detail to implement any suggested changes. Include charts, graphs, and other data visualizations to illustrate key findings. Provide suggestions for any innovative additions that could provide additional benefit to the program.
- 2) The report at a minimum should include:
 - a) Executive Summary
 - b) Introduction
 - c) Overview of the Pilot Program
 - d) Methodology and Assumptions
 - e) Data Description
 - f) Key Findings and Impact Assessment
 - g) Recommendations
 - h) Conclusion
- b.** Submit the draft report and presentation for review and comments by SDCP. Address any questions or concerns and incorporate any feedback.
- c.** Deliver a final report and presentation along with supporting appendices (if needed) and supporting datasets.
- d. Task 3 Deliverables:**
 - 1) Draft report and presentation for review by SDCP staff.
 - 2) Address questions and concerns raised during review and incorporate feedback.
 - 3) Final report and presentation, along with supporting appendices

4. Task 4 (OPTIONAL) – Customer Surveys

- a. Design, administer, and analyze customer surveys aimed at assessing customer satisfaction with SBS, assessing the knowledge of solar and storage of non-SBS participants and assessing the program satisfaction of SBS contractors. The survey results will be representative of the program's customer population.



- 1) Survey Design: Develop a survey methodology appropriate for the target population (e.g., stratified random sampling). Draft survey instrument(s) using Community Power approved questions and industry best practices. Provide options for multiple delivery modes (online, phone, SMS, mail, or mixed mode). Ensure the survey instrument is accessible, culturally appropriate, and available in Spanish languages.
- 2) Data Collection: Develop a sampling plan that will achieve statistically representative results for specified strata. Administer the survey to program participants and non-participants, achieving target response rates through best practice engagement methods. Ensure data integrity, confidentiality, and compliance with applicable regulations. Track response progress and provide bi-weekly status updates.
- 3) Data Analysis: Clean, validate, and weight data as needed. Conduct quantitative and qualitative analysis, including segmentation by customer segment/attribute, geography, and other relevant factors. Identify trends, gaps, and key drivers of customer satisfaction. Benchmark findings against industry or historical utility data where practicable.

b. Task 4 Deliverables:

- 1) Survey project workplan and schedule.
- 2) Final approved survey instrument.
- 3) Bi-Weekly progress reports during fieldwork.
- 4) Delivery of raw and cleaned datasets in agreed formats (e.g., Excel, CSV, SPSS).



**EXHIBIT B
BIDDER INFORMATION**

Bidder shall complete Exhibit B and include it with their Bid submittal to this ITB.

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: _____
CA Business License Number (if applicable)	
Principal Point of Contact	Name: Title: Address: Phone: Email:
Authorized Contract Signatory	Name: Title: Email:
Subcontractor(s) Legal Name (if any)	
Bid Authorization	Name: Title: Signature:



**EXHIBIT C
BIDDER REFERENCES**

Bidder shall complete Exhibit C and include it with their Bid submittal to this ITB.

List three (3) References where the same or similar scope of services were provided in the past three (3) years.

1	Entity Name	Entity Size	Entity Industry
	Project Title / Contract No	Contract Term	Services Provided
	Contact Person	Phone	Email
2	Entity Name	Entity Size	Entity Industry
	Project Title / Contract No	Contract Term	Services Provided
	Contact Person	Phone	Email
3	Entity Name	Entity Size	Entity Industry
	Project Title / Contract No	Contract Term	Services Provided
	Contact Person	Phone	Email



**EXHIBIT D
FEE & RATE SCHEDULE**

Bidder shall complete Exhibit D and include it with their Bid submittal to this ITB.

1. All Bidders must complete Table 1 below for Tasks 1 through 3.

TABLE 1: TASKS 1-3 FEE SCHEDULE		
Task	Fixed Fee Amount	Assumptions/Exclusions
Task 1: Project Planning & Kick-Off	\$	
Task 2: Program-Level Review	\$	
Task 3: Final Report & Presentation	\$	

2. For Bidders bidding on the *Optional* Task 4, complete the Table 2.

TABLE 2: TASK 4 FEE SCHEDULE		
Description	Fixed Fee Amount	Assumptions/Exclusions
Survey design	\$	
Data collection	\$	
Analysis and reporting	\$	
Additional services (translation, incentives, etc.)	\$	
Optional enhancements (e.g., dashboards)	\$	



3. All Bidders may complete Table 3, if desired, to list any other costs or rates not included above. Explain when the costs/rates would apply and provide justification explaining why they are necessary.

TABLE 3: ADDITIONAL COSTS / RATES		
Description	Cost / Rate	Reason / Justification
	\$	
	\$	
	\$	
	\$	