

REQUEST FOR PROPOSALS

FOR

SAN DIEGO COMMUNITY POWER

FOR AN

Enterprise Data Platform
Date of Issuance: August 23, 2024

Submittals Due:
September ~~30~~²⁵, 2024 at 5:00 PM Pacific Time (PT)

No. 24-006

SAN DIEGO COMMUNITY POWER

Enterprise Data Platform RFP

I. BACKGROUND AND INTRODUCTION

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

SD Community Power has a vision to create a secure data infrastructure in the cloud that will provide a single source of truth for all its reporting and advanced analytics needs. This secure data infrastructure will serve as an enterprise data platform for data consumers within SD Community Power. SD Community Power’s enterprise data platform will enable and enhance the mission of delivering clean energy to its customers. The goal of SD Community Power data platform is to deliver operational excellence and strategic value for its customers and staff via predictive analytics and machine learning models.

SD Community Power is looking for a firm⁴ and partner who shares the common vision of helping local communities, delivering clean energy and has demonstrated capabilities in developing and executing advanced data analytics strategies.

The SD Community Power data analytics and IT team has strategized and prioritized the execution of an Enterprise Data Platform (“EDP”) in the cloud. SD Community Power’s EDP will be built in the public cloud and would allow centralization of data across multiple sources, create data-driven analytics for several internal departments, and enable descriptive, diagnostic, predictive and prescriptive analytics. The insights from data will be used to help SD Community

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.

Power meet its mission, design innovative customer programs, forecast load, set rates, and forecast finances.

The top-level goals from SD Community Power's EDP are as follows:

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

SD Community Power expects the work for this RFP to commence on or around December 2, 2024.

SD Community Power's Expectations:

- The EDP solution should be built on a public cloud platform
- The selected Proposer will treat responsibly the handling of customer data and all sensitive data, using industry-standard best practices to protect data in the cloud
- The EDP solution will be built for SD Community Power so that SD Community Power can manage and operate it. After the contracted support period, SD Community Power should have independence and control of the entire environment without reliance on the contractor for the ongoing licensing and support costs.
- The selected Proposer will be available for support during the contracted support period during SD Community Power's business hours from 9am-5pm Pacific Time, Monday through Friday.
- The selected Proposer should be an expert in building enterprise data platforms, working with large volumes of data and working with data of many different types. Specific data fields and schemas should not be needed to demonstrate expertise.

Current State:

- SD Community Power expects to have 2-5 developers (Data Engineers, Data Scientists, Report Developers)
- 50 business users to view reports and dashboards
- The selected Proposer's approach to the scope of this RFP should entail development of a new data platform setup from the ground up, with no expected migration of any existing internal platform needed; however, migration of data from various external sources (see Data Sources in Attachment A) will be required.
- SD Community Power uses vendors for data management and other services. Most customer and interval meter data is stored in vendor platforms.

- The two main data sources for SD Community Power’s customer, meter and billing data are the Investor Owned Utility (“IOU”) and SD Community Power’s Data Manager:
 - **The IOU**
 - Is the original source of the meter data and much of the customer account data.
 - Continues to provide transmission and delivery services, regardless if customers are enrolled with SD Community Power or not. The IOU provides electric generation for customers who opt out of SD Community Power service.
 - Combines SD Community Power electric generation charges with IOU charges to create a single invoice/bill for customers.
 - Receives customer payments and distributes the generation service portion to SD Community Power.
 - **The Data Manager**
 - Is a vendor contracted by SD Community Power to provide Data Management, Customer Billing, Customer Contact Center, and other services.
 - Cleans and validates usage data (interval meter data) received from the IOU before billing and making data available to SD Community Power.
 - Maintains the Customer Relationship Management (CRM) system for interacting with SD Community Power’s customers through the Contact Center and is the original source of CRM data and service options and programs.
 - Performs customer billing for SD Community Power, by generating invoice data that is sent back to the IOU for inclusion on a single invoice/bill.
 - Applies customer payments collected through the IOU to SD Community Power customer account balances.

II. PROPOSAL SCHEDULE

The estimated timetable for this RFP is as follows:

Description	Date
Release of RFP	August 23, 2024
Deadline for Written Questions	September 6, 2024, at 5:00 PM. Pacific Time (PT)
Responses to Questions Provided	September 13, 2024,
Proposals Due	September 25 <u>30</u> , 2024, at 5:00 PM PT

Shortlisting Notification	No later than October 9, 2024
Interviews/Demos	October 14-18
Board Approval	November 21, 2024
Execution of Contract	November 25, 2024
Expected Commencement of Work	December 2, 2024

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

III. QUESTIONS AND RESPONSES

Proposers may submit questions regarding this RFP using the online Questions Submissions Form. The question form can be accessed by using the following hyperlink: <https://forms.monday.com/forms/95913e844a302f3e68a9140c3845c119?r=use1>.

All questions must be received by 5:00 PM PT on September 6, 2024. When submitting questions, please specify which section of the RFP you are referencing and quote the language that prompted the question. Questions may address issues or concerns that the evaluation criteria and/or business requirements would unfairly disadvantage Proposer or, due to unclear instructions, may result in SD Community Power not receiving the best possible responses from Proposer.

SD Community Power will provide responses to questions on September 13, 2024. SD Community Power reserves the right to group similar questions when providing answers.

IV. PROPOSAL SUBMISSION DEADLINE

Proposals should be submitted electronically to SD Community Power as a single PDF document using the online Proposal Submission Form by September ~~30~~²⁵, 2024. The Proposal Submission Form can be accessed by using the following hyperlink: <https://forms.monday.com/forms/101f4c6a91d64e879ca0bd544a859f74?r=use1>.

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

V. REQUEST FOR PROPOSALS

A. Contemplated EDP Software Solution Development and Building Capabilities

The Services sought under this RFP are set forth in more detail in the contemplated EDP Software Solution Development and Building Capabilities (**Attachment A**), attached hereto, and

incorporated herein by reference. Notwithstanding the inclusion of such Services in **Attachment A**, the final scope of Services negotiated between SD Community Power, and the successful Proposer shall be set forth in the Professional Service Agreement (“Agreement”) executed by and between SD Community Power and the successful Proposer. A copy of the Agreement is attached hereto as **Attachment C**.

B. Content and Format of Proposal

Proposals shall be concise, well organized, and demonstrate qualifications and applicable experience and approach necessary to provide the capabilities and tasks in **Attachment A**. An **Attachment D** (Proposal Checklist) has been included in this RFP package to assist Proposers with preparing and submitting a complete proposal. Ideally, proposals should use Calibri 12-point font, be single-spaced with 1-inch margins. Proposals should be submitted in Adobe PDF format. Proposers should submit their Proposals as a single PDF and include the following items shown in this section and in the order listed as a PDF:

1. Cover Letter⁵ (No more than 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

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

- a. The Proposer’s experience in building enterprise data platforms, 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 Aggregation (“CCA”), or energy regulatory landscape or utility experience.
- c. The Proposer’s experience working with energy data, customer meter data, or customer billing data.
- d. A description of the proposed solution that addresses the capabilities and tasks in Attachment A and the team that will support the implementation.

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

- e. Resumes and qualifications of the key personnel who will be responsible for delivering the proposed solution, their respective roles, and specific relevant experience. Include any technical support staff if they will perform a significant role in the preparation of the work products (No more than three pages per team member).
- f. To the extent that a Proposer lacks specific expertise in any of the areas described in **Attachment A**, a professional team of subcontractors or associate firms 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**.
- g. A high-level organizational structure of the team or organizational chart with all proposed team members.

3. Proposed Approach Narrative (No more than five pages): For the proposed solution, please provide a narrative that addresses the following:

- a. The proposed approach to meeting the capabilities and tasks described in **Attachment A** and the collaborative approach to working with SD Community Power. Include any relevant Architecture, Diagrams, Technical Documentation or Referential information as supplemental information to the proposal.
- b. Identify the methods to be used in the completion of and/or carrying out the capabilities and tasks described in **Attachment A**.
- c. Explain common implementation challenges and how your firm will work with SD Community Power to resolve those challenges.
- d. Include services deemed relevant to the successful accomplishment of the Contemplated EDP Software Solution Development and Building Capabilities.

4. Proposed Budget & Narrative (No More than three pages): For the proposed solution please provide a narrative that addresses the following:

- a. Provide a description of total cost for the proposer to develop and build the solution.
- b. Provide an estimate of the operational costs for SD Community Power to operate the platform, including user licenses for tools, cloud storage costs, computer costs, and other applicable miscellaneous costs. This estimate should be based on the current number of data sources, data volumes listed in **Attachment A**. The estimate should be the yearly cost, once the solution is developed and built.

- c. Provide an estimate of the operational staff required to fully operate and manage the platform. Include roles, skills, and experience.

5. Applicable Engagements or References (No more than three pages per applicable engagement or reference): Provide brief summaries of two (2) engagements or references that are similar to the Contemplated EDP Software Solution Development and Building Capabilities requested by SD Community Power in Attachment A. See Attachment B for the Reference template that should be filled out and submitted along with the proposal.

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

C. Protests

1. Protest Contents: A Proposer may protest a contract award if the Proposer believes that the award was inconsistent with SD Community Power Procurement Policy or if this RFP is not in compliance with applicable law. A protest may be submitted electronically to cstephens@sdcommunitypower.org within five (5) business days after receipt of notification of the contract award. Any protest submitted after 5:00 PM of the fifth business day after notification of the contract award will be rejected by SD Community Power as invalid and the Proposer's failure to timely file a protest will waive the Proposer's right to protest the contract award. The Proposer's protest must include supporting documentation, legal authorities in support of the grounds for the protest and the name, mailing address and telephone number of the person representing the Proposer for purposes of the protest. Any matters not set forth in the protest shall be deemed waived.

2. SD Community Power Review: SD Community Power will review and evaluate the basis of the protest provided the protest is filed in strict conformity with the foregoing. SD Community Power shall provide the proposer submitting the protest with a written statement concurring with or denying the protest. Action by SD Community Power relative to the protest will be final and not subject to appeal or reconsideration. The procedure and time limits set forth in this section are mandatory and are the proposer's sole and exclusive remedy in the event of protest. Failure to comply with these procedures will constitute a waiver of any right to further pursue the protest, including filing a government code claim or legal proceedings.

D. Submittal Requirements

1. General: It is strongly recommended that the proposer submit proposals in the format identified in section V(B) to allow SD Community Power to fully

evaluate and compare the proposals. All requirements and questions in the RFP should be addressed and all requested information supplied. SD Community Power reserves the right to request additional information which, in SD Community Power's opinion, is necessary to assure that the proposer's competence, qualifications, number of qualified employees, business organization and financial resources are adequate to perform the services according to the terms of the agreement.

2. 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 agreement and, in particular, the insurance and indemnification provisions therein.

2. Amendments to Proposals: No amendment, addendum or modification will be accepted after a proposal has been submitted to SD Community Power. If a change to a proposal that has been submitted is desired, the submitted proposal must be withdrawn and the replacement proposal submitted to SD Community Power prior to the proposal due date and time.

3. Price Validity: Prices provided by proposers in response to this RFP are valid for 90 days from the proposal due date. SD Community Power intends to award the contract within this time but may request an extension from the proposers to hold pricing until negotiations are complete and the contract is awarded.

4. Right to Negotiate and/or Reject Proposals: SD Community Power reserves the right to negotiate any price or provision, task order or service, accept any part or all of any proposals, waive any irregularities, and to reject any and all, or parts

of any and all proposals, whenever, in the sole opinion of SD Community Power, such action shall serve its best interests and those of SD Community Power ratepayers. The proposers are encouraged to submit their best prices in their proposals, and SD Community Power intends to negotiate only with the Proposers whose proposal most closely meets SD Community Power's requirements at the lowest estimated cost. The contract award, if any is awarded, will go to the proposer whose proposal best meets SD Community Power's requirements.

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

F. Proposal Evaluations & Criteria

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

	Evaluation Criteria
1.	Proposer's qualifications and experience
2.	Demonstration of past success
3.	Proposer's approach to meeting the Contemplated EDP Software Solution Development and Building Capabilities requested in Attachment A
4.	Commercial Terms (Price) SD Community Power
5.	Responses to SD Community Power Technical and Cybersecurity Requirements (Attachment E)
	Total

Following the initial evaluation, SD Community Power may select one Proposer or select a number of Proposers (with or without interviews); or conduct interviews with a short-list of Proposers, consisting of those Proposers reasonably likely, in the opinion of SD Community Power, to be awarded the contract. Any interview may include discussions about services offered, conflicts of interests with other clients, or fees/compensation amount or structure.

Interviews may take place through written correspondence, telephone or video conference, or face-to-face interviews, at SD Community Power's sole discretion. SD Community Power reserves the right to not convene interviews or discussions, and to make an award on the basis of initial proposals received. References may be contacted at any point in the evaluation process.

After a Proposer has been selected, SD Community Power will negotiate a contract for execution. The Selected proposer will be asked to complete and execute a separate Non-Disclosure Agreement. If a satisfactory contract cannot be negotiated, SD Community Power may, at its sole discretion, begin contract negotiations with the next qualified Proposer who submitted a proposal, as determined by SD Community Power. Proposers are further notified that SD Community Power may disqualify any Proposer with whom SD Community Power cannot satisfactorily negotiate a contract.

VI. RESERVATION OF RIGHTS

This RFP is a solicitation for proposals only and is not intended as an offer to enter into a contract or as a promise to engage in any formal competitive bidding or negotiations. SD Community Power may, at its sole discretion, accept or reject any or all proposals submitted in response to this RFP. In addition, SD Community Power may, at its sole discretion, only elect to proceed with contract negotiations for some of the services included in the proposal. SD Community Power further reserves the right to cancel this RFP at any time prior to contract award without obligation in any manner for proposal preparation, interview, fee negotiation or other marketing costs associated with this RFP. SD Community Power also reserves the right to waive minor errors and omissions or inconsequential disparities in proposals, request additional information or revisions to offers, and to negotiate with any or all Proposers.

SD Community Power shall not be liable for any costs incurred by the Proposer in connection with the preparation and submission of any proposal. SD Community Power has the right to amend the RFP, in whole or in part, by written addendum, at any time. SD Community Power is responsible only for that which is expressly stated in the solicitation document and any authorized written addenda. Such addendum shall be made available to each person or organization which SD Community Power records indicate has received this RFP. Should such addendum require additional information not previously requested, failure to address the requirements of such addendum may result in the proposal being found non-responsive and not being considered, as determined in the sole discretion of SD Community Power. SD Community Power is not responsible for and shall not be bound by any representations otherwise made by any individual acting or purporting to act on its behalf prior to an award of contract by SD Community Power. SD Community Power has the right to reissue the RFP at a future date.

VII. CONFIDENTIALITY AND PUBLIC RECORDS

Proposals submitted in response to this RFP shall become the exclusive property of SD Community Power. SD Community Power is subject to the California Public Records Act ("CPRA"). The proposal will become a matter of public record when contract negotiations are complete and when an agreement is executed by SD Community Power. Exceptions to disclosure may be

available to those parts or portions of proposals that are justifiably and reasonably exempted under the CPRA, such as trade secrets. If a Proposer desires to exclude a portion of its proposal from disclosure under the California Public Records Act, the Proposer must prominently mark it “confidential” and state the specific provision in the California Public Records Act that provides the exemption as well as the factual basis for claiming the exemption. A blanket statement of confidentiality or the marking of each page of the proposal as confidential shall not be deemed sufficient notice of a CPRA exemption. A Proposer who indiscriminately and without justification identifies most or all of its proposal as exempt from disclosure or submits a redacted copy may be deemed non-responsive.

Although the CPRA recognizes that certain confidential information or other exempt records may be protected from disclosure, SD Community Power is not in a position to establish that the information that a Proposer submits is exempt. If a request is made for information marked “Confidential,” SD Community Power will provide Proposers who submitted the information with reasonable notice to seek protection from disclosure by a court of competent jurisdiction.

SD Community Power shall not, in any way, be liable or responsible for any resulting disclosure of any such record or any parts thereof pursuant to the CPRA or otherwise by law.

VIII. CONFLICTS OF INTEREST

SD Community Power is governed by the Political Reform Act, Government Code Section 1090, Government Code Section 84308, and other requirements governing conflicts of interest, campaign contributions, and gifts. Proposers are required to review all applicable conflict of interest laws. In addition, SD Community Power has adopted policies governing procurement. Proposers are advised to review all policies, including the Procurement Policy, available at: <https://sdcommunitypower.org/resources/key-documents/>.

The Proposer may not contact or receive information outside of this RFP process. If it is discovered that the Proposer contacted and received information from anyone other mediums used to share information about this solicitation specified above and under the process specified herein regarding this solicitation, SD Community Power may, in its sole discretion, disqualify the proposal from further consideration.

All contact regarding this RFP or any matter relating thereto must be in writing and submitted using the Questions Submissions Form. The question form can be accessed here: <https://forms.monday.com/forms/95913e844a302f3e68a9140c3845c119?r=use1>.

IX. REPORTING OF SUPPLIER DIVERSITY INFORMATION

Public Utilities Code Section 366.2(m) requires certain community choice aggregators, including SD Community Power, to annually submit to the California Public Utility Commission (“CPUC”): (1) a detailed and verifiable plan for increasing procurement from small, local, and

diverse business enterprises; and (2) a report regarding its procurement from women, minority, disabled veteran, persons with disabilities, and LGBT business enterprises.

General Order (GO) 156, adopted by the CPUC, requires certain California public utilities to engage in outreach activities and meet specific procurement goals from women, minority, disabled veteran, persons with disabilities, and LGBT business enterprises. Qualified businesses become GO 156 certified through the CPUC and are then added to the GO 156 Supplier Clearinghouse database.⁶

To assist SD Community Power with its reporting obligations under Public Utilities Code Section 366.2(m) and with evaluating its supplier outreach and other activities, the successful proposer that is awarded the contract will be asked to voluntarily disclose their certification status with the CPUC Clearinghouse, as well as their efforts to work with diverse business enterprises, including women business enterprises (WBEs), minority business enterprises (MBEs), disabled veteran business enterprises (DVBES), and lesbian gay bisexual transgender business enterprises (LGBTBES).

Except as otherwise expressly provided under SD 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), SD Community Power shall not use any demographic information received from potential vendors in any way as part of its decision-making or selection process. Rather, SD Community Power will use such information solely for compliance with its reporting obligations to the CPUC and evaluation of SD Community Power's outreach and other activities consistent with applicable law. Pursuant to Article I, Section 31 of the California Constitution, SD Community Power shall not discriminate against or give preferential treatment to any individual or group on the basis of race, sex, color, ethnicity, or national origin except as otherwise allowed therein.

X. NON-DISCRIMINATION

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

XI. ATTACHMENTS

Attachment A – Contemplated EDP Software Solution Development and Building Capabilities

Attachment B – Prospective Proposer References

Attachment C – SD Community Power Sample Professional Services Agreement

Attachment D – Proposal Checklist

Attachment E – Technical and Cybersecurity Requirements

⁶ www.thesupplierclearinghouse.com

ATTACHMENT A

Contemplated EDP Software Solution Development and Building Capabilities

Contemplated Capabilities

- a. Can be operated and managed fully by SD Community Power after completion of build
- b. Built on public cloud platform, and uses technology stack of industry-standard or modern tools
- c. Visibility and monitoring of operational costs (cloud storage, compute, etc.)
- d. Scalable solution
- e. Centralized data warehouse
- f. Self-service reporting for approximately 50 business users, and allow customization of reports and dashboards
- g. Enable development, testing and deployment of predictive, prescriptive and machine learning models
- h. Secure sharing framework with approved external sources
- i. User-friendly for developers and end users
- j. Ingest existing data of 20TB from 5-10 external vendor source data platforms, with various authentication methods
- k. Automated refreshes of source data at desired frequencies (approximately 20GB daily), with the ability to initiate a refresh on-demand, as needed
- l. Integrate with various analytic and visualization tools (Tableau, PowerBI, etc.)
- m. Automated monitoring of data pipeline health and data quality
- n. Protect and secure data using best practices
- o. Robust user access management, control and monitoring
- p. Data lineage and tracking throughout the platform
- q. Compliance with all internal and external policies

Contemplated Tasks

1. Administration

- a. Provide a robust project implementation roadmap for EDP
- b. Provide monthly progress reports
- c. Provide monthly budget reports
- d. Provide price estimates for operating EDP, including all licenses, tools, cloud storage and resource costs.

- e. Gather and document requirements through collaboration with SD Community Power team
- f. Provide testing plan for user acceptance
- g. Provide training materials and meetings for developers and end users
- h. Train SD Community Power staff on administration, operation, maintenance, and security protocols
- i. Provide tracking log of all bugs and enhancements
- j. Provide thorough documentation of entire platform
- k. Align with SD Community Power's agile cadence and follow two-week sprint schedule
- l. Schedule any necessary regular meetings during SD Community Power's business hours between 9am and 5pm Pacific Time, Monday through Friday
- m. Report and resolve all major bugs and issues before completion of the project

2. Platform Development and Deployment

- a. Architect end-to-end cloud-based solution
- b. Configure end-to-end cloud environment, including cloud storage, resources, and tools
- c. Set up billing alerts to monitor cloud operational costs
- d. Follow best practices for version control, documentation, security, change management
- e. Develop security and user access framework for protecting, managing, and monitoring data
- f. Classify data by sensitivity and limit access based on classification
- g. Develop data cleaning and validation procedures
- h. Build ETL/pipelines
- i. Ingest existing data into platform
- j. Refresh source data into platform according to requested frequency
- k. Develop sandbox or test environment for analytics
- l. Integrate with data analysis or visualization tools such as PowerBI, Tableau, and Looker to allow SD Community Power users to create their own visualizations and reports
- m. Enable self-service reporting and customization of reports and dashboards
- n. As-needed support for the proposed solution

3. **Analytics and Report Development**

- a. SD Community Power expects the Selected Contractor to develop customizable analytics, reports, and dashboards for **Primary Use Cases**.
- b. Train SD Community Power staff on customization or analytics, reports and dashboards

4. **Analytics and Report Enablement**

- a. SD Community Power will work with the selected contractor to develop relevant **Secondary Use Cases**
- b. Work with SD Community Power to suggest additional or external data sources to complete **Secondary Use Cases**

5. **Support**

- a. Manage user roles and access permissions
- b. Troubleshoot issues from SD Community Power developers and end users
- c. Manage integration of tools

Primary Use Cases

1. **Centralized Customer Account Database with History**

- a. Single source of truth for customer account attribute data across IOU system, CRM systems, and other systems.
- b. Ability to track and identify customer account numbers across multiple instances, duplicates, and data sources.
- c. Historic date spans for customer attributes, to see what attributes were present on any given day. Historic detail across multiple instances.
- d. Multiple granularity or hierarchy levels (service point, billing account number, combination of service point and billing account number, customer number, other account numbers).

2. **Centralized Customer Usage Database**

- a. Single location for all customer usage data, across various sources. Include both interval meter data (15 minute or hourly), and scalar data from unmetered accounts.
- b. Identifier of best-available data source, based on billing quality for each data source.

3. **Centralized Customer Billing Database** – Single location for all invoices, payments, and customer account balance data.

4. **360 Customer View** – Centralized view of all customer data across data sources.
5. **KPI Tracking** – Reports and Dashboards (up to daily), with ability to drill down by customer attributes. Some examples are:
 - a. Number of accounts, participation rate, enrollment options, service option choices.
 - b. Invoiced revenue and usage volumes by billing cycle and by flow month, payment volumes, account outstanding balances by aging bucket, accounts in collections etc.
 - c. Hourly usage volumes by day and customer class.
 - d. Participation in programs.
6. **Data Clustering/Grouping/Profiling**
 - a. Customer Usage Profiles – Group customers based on their usage habits (hourly load shape, high/avg/low usage totals, peak usage totals), and Customer Account attributes (customer class, rate schedule, climate zone, territory, electric vehicle ownership status, net energy metering status, voltage etc.).
 - b. Customer Payment Profiles – Group customers based on their payment history, payment type, customer class, rate schedule, climate zone, territory and outstanding balances.
7. **Data Monitoring**
 - a. Customer account discrepancies – Flag accounts that do not match expected values, according to business logic.
 - b. Data Source Cross-Validation- Monitor usage and revenue volumes across data sources, to flag discrepancies.
8. **Outlier Detection** - Flag customers outside historical norms, including usage, invoiced amounts, payments, balances.
9. **Forecasting** - Project monthly levels of accounts, participation, opt stats, revenue and usage.
10. **Weather-Normalization** – See what customer-level and aggregate usage would look like under a normal weather day.
11. **Weather Scenarios** - Be able to see what customer-level and aggregate usage would look like under different weather scenarios.
12. **Standardized Mailing Address** – Standardize mailing addresses to validate before sending customer notification communications via regular mail.

Secondary Use Cases

1. **Short Term Load Forecasting** – Create day-ahead and week-ahead hourly load forecast for SD Community Power’s aggregate load. Ability to forecast subsets, including customer class or rate schedule.
2. **Long Term Load Forecasting** – Create long term forecast of SD Community Power load.
3. **Long Term Revenue Forecasting** - Create long term forecast of SD Community Power revenues, with parameters for price levels, weather scenarios, down to customer class and rate schedule.
4. **Load Growth Factor** – Project load growth due to electrification, usage trends, weather trends.

Data Sources

The volumes are for illustrative purposes. Volumes are approximate as of the current state but are subject to change.

Data Source	Initial Data	Ongoing Daily Volume	Format	Number of Data Reports/Tables
Total: 8-10 Systems	Total <20 TB	Total < 20GB		
Data Manager	<5 TB	<15 GB	SQL view/API	<25 tables
IOU	<5 TB	<1 GB	Csv/excel files	<5 weekly reports
SD Community Power	<1 TB	<1 GB	Csv/excel files	< 10 weekly reports
3 rd Party Subscription	<1 TB	<1 GB	Web Portal/API	<5 daily tables
Other Vendors	<1 TB	<1 GB	Web Portal/API	TBD

Data Feeds

The summary of current data feeds is not exhaustive and is for illustrative purposes. These are the main feeds that will make up the basis of the platform. SD Community Power is looking for a partner experienced in working with large datasets of all types. The actual fields and schema should not be needed to demonstrate expertise in completing the required tasks.

Report/Table	Source	Refresh	Data Feeds
Customer Accounts and Attributes	Data Manager	Weekly	1 table
Customer Invoices	Data Manager	Daily*	3 tables
Customer Payment History (no direct payment/credit card/banking data)	Data Manager	Daily*	1 table
Customer Balances	Data Manager	Daily*	1 table
CRM Interactions	Data Manager	Daily*	7 tables
CRM Enrollment	Data Manager	Daily*	1 table
CRM Program Enrollment	Data Manager	Daily*	1 table
Customer Meter Data	Data Manager	Daily	1 table

CAISO Settlement Data	Data Manager	Daily	1 table
Weather History	3rd Party Subscription	Daily	1 table
Customer Billing Rates	SD Community Power	2-3 per year	1 table
Historic Meter Data	Data Manager	Yearly	1 table
Power Market Data	3 rd Party Subscription	Daily	5 tables
Load Forecast	Scheduling Vendor	Daily	1 table
Real time and Day Ahead Market Prices	Scheduling Vendor	Daily	2 tables
Geospatial Data – Geographic Zones	SD Community Power	Monthly	5 csv/ shapefiles

*Daily feeds refer to weekdays only

ATTACHMENT B
PROSPECTIVE PROPOSER REFERENCES

Proposer's Name: _____

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

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

ATTACHMENT C
SD COMMUNITY POWER SAMPLE PROFESSIONAL SERVICES AGREEMENT

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

ATTACHMENT D
PROPOSER SUBMISSION CHECKLIST

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

Online Application Form Hyperlink:

<https://forms.monday.com/forms/101f4c6a91d64e879ca0bd544a859f74?r=use1>.

- ☐ Cover Letter (No more than 2 pages)
- ☐ Experience & Qualifications Narrative (No more than eight pages)
- ☐ Proposed Approach Narrative (No more than five pages)
- ☐ Proposed Budget & Narrative (No More than three pages)
- ☐ Resumes & Professional Certifications (No more than three pages per team member)
- ☐ Applicable Engagements or References (No more than three pages per applicable engagement or reference)
- ☐ Responses to Technical and Cybersecurity Questions: (No more than 2 pages)

ATTACHMENT E

TECHNICAL AND CYBERSECURITY QUESTIONS

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

1. **Data access and security:** What measures does the proposer have in place to ensure that the software has robust security to protect sensitive data from unauthorized access, theft, or loss?
2. **Compliance:** Please describe any experience complying with industry regulations and/or standards (HIPAA, GDPR, PCI DSS, CCPA, etc.)
3. **Operational Model:** Include a suggested operational model required to operationalize SDCP enterprise data platform.
4. **Cybersecurity:** Provide details on the cybersecurity features, including encryption, multi-factor authentication, and intrusion detection and prevention.