

**Request for Proposals ("RFP") for Customer Center and Data Management (CCDM)  
SD Community Power Responses to Proposer Questions**

1. **Question 3 has a 5-page limit; however, Attachment A contains 32 questions (with most being multi-part, compound questions) that are required to be answered and take up approximately 2.5 pages of text on their own. In order to give SDCP accurate, thorough, yet succinct answers to these questions, as well as ensure SDCP receives the best possible response from proposers, we are requesting this section have the page limit removed or at a minimum, be expanded to at least 20 pages.**

**Response:** SD Community Power would like for respondents to comprehensively address all sections of our contemplated scope of service i.e. **Attachment A**. As such, we will allow for the Proposed Approach Narrative section within proposal submittals to increase from **5 to 20** pages as needed accordingly. Community Power will issue an addendum to reflect the change to the page limits to the Proposed Approach Narrative. Community Power will to issue an addendum shortly after the posting of these responses to reflect the change.

2. **In the Background and Information section it mentions "In order to qualify for consideration, respondents must at a minimum have experience providing the services sought in this RFP within the State of California" - That said, if we have experience providing services to Electric companies outside of the State of California, do we still qualify to bid?**

**Response:** In order to qualify for consideration, respondents must at a minimum have experience providing the services sought in this RFP within the State of California, either for Investor-Owned Utilities (IOUs), Publicly Owned Utilities (POUs), Electric Service Providers (ESPs), or Community Choice Aggregators (CCAs).

3. **In the section 1.1 General Overview of Services Requested, - For the calculation of Settlement Quality Meter Data (SQMD), could you provide details on any specific protocols established for the existing meter types? This information would be valuable in evaluating the development needs for the required billing engine and any associated service requirements.**

**Response:** Please refer to the CAISO Meter Data Acquisition and Processing Procedure<sup>1</sup> as well as CAISO SQMD Plan - Submission & Approval Process<sup>2</sup>

4. **What type of call volume is expected to be handled for the customer center?/What is the current monthly call volume trend?**

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<sup>1</sup> <https://www.caiso.com/documents/5740.pdf>

<sup>2</sup> <https://www.caiso.com/documents/5750.pdf>



**Response:** Please access our latest Board of Directors report for November 2024 through November 2024 Board Packet<sup>3</sup> (page 39 and 40) capture the breakdown of our Contact Center Metrics from 2021 through October 2024 including total calls, average call duration, abandon rate etc.

**5. How many employees are expected to be on the phones taking calls, and how many employees are expected to process other requests (back office, tasks, etc.)?**

**Response:** Please access our latest Board of Directors report for November 2024 through November 2024 Board Packet<sup>4</sup> (page 40) captures the breakdown of our Contact Center Metrics from 2021 through October 2024 including the count of dedicated Customer Service Representatives etc. For back-office deliverables and tasks, the incumbent CCDM vendor has a dedicated Team that handles other aspects of their service delivery to SD Community Power including billing, SQMD, rate implementation support etc.

**6. What are the current operating hours for the Contact Center? Is it Monday to Friday, 8:00AM to 5:00PM PST? If not, please specify the support window.**

**Response:** This is correct, SD Community Power Customer Service Center is open Monday through Friday from 8AM to 5PM PST (excluding observed holidays).

**7. Under section 1.2.9.1 Customer Service Center Options for SD Community Power, it mentions needing staff or location within the SD Community Power Territory. Could a vendor have a physical location in Florida for centralized leadership and hire Work From Home Agents in the SD Community Power Territory and still be eligible for bidding on this RFP, OR does the vendor need to have a physical location in the SD Community Power Area?**

**Response:** Respondents to this RFP can have their physical headquarters outside of SD Community Power service territory. However, they must have the ability to facilitate some level of Customer Service Center support via in-house staff and/or within SD Community Power service territory at some point in time to be determined including but not limited to:

- Brick and Mortar: Operate a Customer Service Center within SD Community Power service territory fully staffed by vendor agents.
- WFT (Working From Territory): Place remote vendor agents within SD Community Power service territory.
- Ensure at least 3 dedicated Customer Service Center personnel are fluent in Spanish, and ensure that an interpreter will be made available for customers whose primary language is not English.

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<sup>3</sup> <https://sdcommunitypower.org/wp-content/uploads/2020/12/BOD-packet-11212024.pdf>, see Pg. 39-40.

<sup>4</sup> <https://sdcommunitypower.org/wp-content/uploads/2020/12/BOD-packet-11212024.pdf>, see Page 40.



- Staff: Support a limited number of SD Community Power-employed agents that supplement the Customer Service Center.
- Flexibility for SD Community Power to bring in-house the full scope of Customer Service Center operations at some point in time to be determined by staff and renegotiate the scope of services including charges accordingly.

**8. Per section 1.2.9, Could you please provide the ACD monthly report with 15-minute interval data?**

**Response:** An addendum #1 to the CCDM RFP will be issued soon that includes an attachment for 1 day of usage data in 15-minute interval increments via 15-minute interval sample. The excel file will be available on SD Community Power's solicitations page shortly after the posting of these responses. Please see SD Community Power's solicitations page for more information.<sup>5</sup>

**9. In the section 1.2.9.4. Integration with Customer Service Center - To ensure seamless continuity and data accessibility, will the incumbent CCDM vendor facilitate access to the existing Dynamics 365 CRM data—either via API or through data export—during a specified transition period following contract award? This access would enable the incoming CCDM vendor to upload historical data or establish systems for ongoing integration with the current Dynamics 365 CRM platform managed by the incumbent CCDM provider.**

**Response:** Yes, SD Community Power expects that the incumbent CCDM vendor will facilitate needed access to the existing Dynamics 365 CRM data either via API or through data export-during a specified transition period following contract award by us as we see fit to a different vendor. It should be noted that the CRM data is in a constant weekly and daily refresh schedule as a function of the ongoing back-end EDI transactions as well as the weekly refresh data from the Investor-Owned Utility (IOU).

**10. Can you provide more details or examples of the specific data feeds and processes that need to be managed between SDGP and the Investor-Owned Utilities (IOUs)? (p. 15, Attachment A 1.1. General Overview of Services requested).**

**Response:** Please visit SDG&E Electronic Data Interchange Information webpage<sup>6</sup> to view the required EDI data feeds and processes that will need to be managed by the respondent on behalf of Community Power with SDG&E.

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

<sup>6</sup> <https://www.sdge.com/electronic-data-interchange-information>



**11. What specific support or collaboration is expected from the incumbent vendor during the transition phase? Are there any anticipated challenges based on past experiences? (p. 22, 1.2.9.2 Customer Service Center Technology).**

**Response:** The incumbent CCDM vendor shall develop, with reasonable assistance from Community Power, a written transition plan specifying in detail all activities, and the timing of such activities, necessary to facilitate an orderly and effective transition of all services. The incumbent vendor shall provide to Community Power customer data and documentation, and other non-proprietary information reasonably requested in connection with the transition that is reasonably sufficient to enable a new services provider to fully assume the provision of the transitioning services. Community Power has had the same incumbent CCDM vendor since inception of its services to customers in 2021 and so there are no past experiences to be shared from a transition perspective at this time.

**12. Are there specific technology platforms or tools that SDCP prefers for data management? (p. 17, Attachment A - Data Management).**

**Response:** Through this RFP, Community Power is seeking proposals from qualified respondents to provide professional services for Customer Center and Data Management Services along with the specific and requisite technology platforms and their integration required for successful provision of the requested services. Community Power expects for the respondents to articulate what those technology platforms and tools are as part of their proposal submittals.

**13. What existing systems must the new CCDM vendor integrate with, and are there any known compatibility issues that we should be aware of? (p. 18 Attachment A -1.2.4 SD Community Power Enterprise Data Platform (EDP) Integration).**

**Response:** The incumbent vendor currently utilizes their proprietary back-office billing and other systems on behalf of Community Power and shall develop, with reasonable assistance from our end, a written transition plan specifying in detail all activities, and the timing of such activities including the needed system integration and data transfer and the mode to facilitate it to the new CCDM vendor to ensure an orderly and effective transition of all services. The incumbent vendor shall provide to Community Power customer data and documentation, and other non-proprietary information reasonably requested in connection with the transition that is reasonably sufficient to enable a new services provider to fully assume the provision of the transitioning services. Community Power is currently in the process of sourcing and building its Enterprise Data Platform (EDP) and there are no known compatibility issues known at this time.



**14. How do you currently ensure the accuracy and completeness of interval and billing data? (p. 19, 1.2.6 Managing Rates and Rate Tables).**

**Response:** The incumbent vendor manages EDI transactions with SDG&E on Community Power's behalf including ensuring the accuracy and completeness associated with the pertinent dataset. Please visit SDG&E Electronic Data Interchange Information webpage<sup>7</sup> to view the required EDI data feeds and processes that will need to be managed by the respondent on behalf of Community Power with SDG&E.

**15. Can you describe your current process for managing EDI transactions and handling exceptions? (p. 18, 1.2.4 SD Community Power Enterprise Data Platform (EDP) Integration).**

**Response:** The incumbent vendor manages EDI transactions with SDG&E on Community Power's behalf. Please visit SDG&E Electronic Data Interchange Information webpage<sup>8</sup> to view the required EDI data feeds and processes that will need to be managed by the respondent on behalf of Community Power with SDG&E.

**Is there a budget range or cap that SDCP has in mind for the proposed services, particularly for the initial three-year contract term? (p. 7, B. Content and Format of Proposal, 4. Proposed Budget & Narrative).**

**Response:** Community Power's budget for the fiscal year of this work is \$14.6M as described in our Annual Budget presented to the board in June 2024 (page 182).<sup>9</sup> Community Power expects to have a similar budget for this work year over year for the lifecycle of the contract with the selected Proposer.

**16. Can you provide details on the expectations for language support beyond Spanish, and how many languages are anticipated to be needed? (p. 22 Attachment A - 1.2.9.1 Customer Service Center Options for SD Community Power)**

**Response:** We expect at least two, preferably three or more, Contact Center Agents to be proficient Spanish speakers, available to support both English and Spanish speaking customers. While we do not require Agents to speak languages beyond English and Spanish, per SD Community Power's Language Access Policy,<sup>10</sup> we expect the respondent to offer interpretation services for customers who are proficient in a language other than English, including but not limited to SD Community Power's core languages of Spanish, Tagalog, Vietnamese, Chinese and Arabic.

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<sup>7</sup> <https://www.sdge.com/electronic-data-interchange-information>

<sup>8</sup> <https://www.sdge.com/electronic-data-interchange-information>

<sup>9</sup> <https://sdcommunitypower.org/wp-content/uploads/2020/12/BOD-PA1-1.pdf>, see Pg. 182.

<sup>10</sup> [https://sdcommunitypower.org/wp-content/uploads/2023/07/SDCP-Language-Access-Policy\\_Final.pdf](https://sdcommunitypower.org/wp-content/uploads/2023/07/SDCP-Language-Access-Policy_Final.pdf)

**17. How flexible is your current billing engine in supporting dynamic pricing and special rates? (p.15, Attachment A, 1.1 General Overview of Services Requested.)**

**Response:** The incumbent vendor manages the billing engine on behalf of Community Power including the application of our Board approved rates to usage received from SDG&E for billing purposes. With legislative and regulatory requirements to explore and move to dynamic pricing in the future along with ability to support special rates, Community Power expects for respondents to provide their experience and proficiency in supporting multiple rate structures including those that change on an hourly or sub-hourly (i.e., 15-minute) interval basis. Respondents should be able to connect, interface, and/or interact with dynamic pricing rate engines and/or tools (such as Energy Commission's Market Unformed Demand Automation Server (MIDAS)) in supporting dynamic pricing and/or special rates.

**18. Can you provide sample scenarios of how you managed complex billing scenarios in the past? (p.15, Attachment A, 1.1 General Overview of Services Requested.)**

**Response:** The incumbent vendor manages all the billing functions including complex billing scenarios such as those associated with Net Billing Tariff (NBT) on behalf of Community Power. Community Power expects for respondents to articulate their experience and proficiency in managing complex billing scenarios as part of their proposal submittals.

**19. What reports do you provide internal stakeholders, and how do you ensure their accuracy? (p. 26, Attachment A, 1.3.7 Financial Reporting)**

**Response:** The incumbent vendor manages all the billing functions, payment remittance application and A/R aging tracking on behalf of Community Power. Community Power expects for respondents to articulate their experience and proficiency in managing the entire suite of back-office support scope of services captured in **Attachment A** as part of their proposal submittals.

**20. Would you be able to provide a recent example of an RFP that your team accepted for some of your smaller projects?**

**Response:** Community Power issues RFPs regularly and posts RFPs to its website here: <https://sdcommunitypower.org/resources/solicitations/>. Community Power's closed solicitations are also listed on its website. For examples of recent Contracts that have been approved by the Community Power Board of Directors, please review Community Power's regular Board of Director's meeting materials here: <https://sdcommunitypower.org/resources/meeting-notes/>.

- 21. Per section 1.1 general overview of services requested, currently SD Community Power relies on a 365 Dynamics CRM application hosted by our incumbent CCDM vendor. Therefore, respondents should address how they can support data and system integration to the current and future state of SD Community Power mechanics. Does SD Community Power want the vendor to use the same CRM or do we need to deploy a new CRM and pull the data from the existing CRM hosted by CCDM?**

**Response:** As articulated in this RFP, Community Power ultimately envisions standing up its own enterprise-wide CRM that will need to be integrated with the Contact Center and Data Management functions that respondents are expected to provide as part of this RFP. SD Community Power relies on multiple technology streams for Customer Service Center support currently offered by the incumbent CCDM vendor, including telephony, interactive voice recording, customer service email, integrated language support and web forms. Additionally, any CRM maintained by the incumbent vendor and the successful vendor selected from this RFP (distinct from the would-be enterprise-wide SD Community Power CRM) will be required to provide SD Community Power direct access to its customer information within the CRM. This includes, but is not limited to: customer name, customer IOU account and service delivery point number, rate, billing history, payment history, IOU bills, enrollment status, and interaction records, usage, marketing and Contact Center interactions, program participation, Customer Service Center interactions, and a myriad of other data. The CRM must also provide a visual dashboard of key metrics which may include but are not limited to enrollment status, interaction report, program participation and product selection.

- 22. Per section 1.2.6.1 overview of rate setting at SD Community Power, describe in general your billing engine's capabilities for supporting rates and any features of the billing engine that support flexibility in rate setting. Does SD Community Power want the vendor to bring a billing module? Is SD Community Power open to bringing a billing module from any other vendor? What timeline does SD Community Power have in mind to develop a bill/rate comparison tool? SD Community Power does not own the current CCDM vendor's tool?**

**Response:** The incumbent vendor through its proprietary billing systems and applications manages all the billing functions, payment remittance application and A/R aging tracking on behalf of Community Power. Community Power expects for respondents to articulate their experience and proficiency in managing the entire suite of back-office support as part of their proposal submittals. For the bill/rate comparison tool, Community Power's incumbent vendor currently supports a residential tool that's embedded on our website that is accessible via [Residential Bill Comparison Calculator](https://bill-compare.communityenergysolutions.com/ui-v3/home/4/1/1)<sup>11</sup> and a Non-Residential bill comparison tool that is accessible via [Commercial Bill Comparison Calculator](https://bill-compare.communityenergysolutions.com/ui-v3/home/4/2/1).<sup>12</sup> As far as the timing to develop similar bill/rate comparison tools goes, Community Power expects for selected vendor to be able to stand up similar tools to ensure seamless transition and minimal disruptions to the end use customers and Community Power's operations. Respondents to this RFP should articulate in their proposal submittals the transition timeframe required to have seamless transition of the systems, processes and applications that our incumbent CCDM vendor currently handles on behalf of Community Power.

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<sup>11</sup> <https://bill-compare.communityenergysolutions.com/ui-v3/home/4/1/1>

<sup>12</sup> <https://bill-compare.communityenergysolutions.com/ui-v3/home/4/2/1>

### **23. 1.3.5. Customer Program Enrollment Support**

**“In order to support SD Community Power’s Local Programs, SD Community Power will rely on the CCDM provider to educate and enroll customers in SD Community Power programs via the Customer Services Center. CSRs will need to be able to discuss programs in detail and walk customers through enrollment processes. SD Community Power would provide standard operating procedures, talking points, resources and program descriptions for eligible programs. Response Narrative: Describe your experience in supporting customer program education and enrollments, including out-bound calls to enroll customers in programs.” Please further describe what the education expectations are. Are CSR expected to suggest available programs to customers calling in for any reason? Are CSR expected to be knowledgeable enough to address customers’ questions around specific programs.**

**Response:** SD Community Power expects CSRs to have at least a high school diploma or equivalent education. Generally, SD Community Power also expects that CSRs supporting our Customer Services Center will have the requisite knowledge of our programs and service offerings to be a reliable and trusted source of information to our esteemed customers. We’d like for our CSRs to provide not only program/service offering information and walk customers through the associated enrollment criteria as needed but also assist customers with performing opt actions. While we expect the CCDM provider will provide training on SD Community Power’s program and service offerings, CSRs will be provided with appropriate resources, including talking points and program descriptions, to support discussions around programs/service offerings, as well as process documents to assist in the performing of opt actions. These resources will be updated on an as-needed basis.

### **24. Section IV & Section V.B.7**

**“Proposals should be submitted electronically to SD Community Power as a single PDF document using the online Proposal Submission Form by December 02, 2024.” Proposed Revisions to the SD Community Power Professional Services Agreement: Any proposed revisions to SD Community Power’s Sample Professional Services Agreement (see Attachment C – Sample Professional Services Agreement) in redlined form. The submission guidelines indicated a single PDF should be submitted with all documents, which we assume to include the redline of the template contractual agreement. We are requesting to submit the contractual redline as a redlined word doc, to avoid formatting and content errors that can arise when a PDF is converted to Word. Please confirm if SDCP would be ok with this or would prefer the contractual redline be included in the single PDF submission.**

**Response:** SD Community Power is amenable to Attachment C i.e. Sample Professional Services Agreement being submitted with the redlines from the respondents as a Word document as part of the overall proposal submittal. Community Power will issue an addendum to reflect the Proposer’s ability to submit a word version of the proposed redlines to Community Power’s standard Professional Services Agreement. Community Power will issue an addendum shortly after the posting of these responses to reflect the change.

### **25. Section VII CONFIDENTIALITY AND PUBLIC RECORDS (entire section)**

**a) We are seeking clarity on SDCP’s requirement for marking elements of a**





**proposal as exempt from the CPRA. We plan to mark pages that include content that we believe is exempt from disclosure under the CPRA and can additionally provide a copy that redacts the specific elements that we believe is exempt from.**

**Response:** In accordance with RFP Section VII (Confidentiality and Public Records), “[e]xceptions 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.”

Proposers that are considering marking elements of their proposal as exempt from CPRA requests should clearly mark the specific pages or sections that are confidential by including the word “CONFIDENTIAL” somewhere on each page.

Further, “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.”