



**ADDENDUM- REQUEST FOR PROPOSALS
Demand Response Partner**

TO: All Prospective Proposers

SUBJECT: ADDENDUM 1- Request for Proposals: Sonoma Clean Power Demand Response Partner

DATE ISSUED: January 24, 2022

RESPONSES DUE: February 16, 2022

I. RFP SUMMARY

No changes.

II. ABOUT SONOMA CLEAN POWER

No changes

III. RFP TIMELINE

Add:

EVENT	DEADLINE
Target Date for Behavioral Demand Response launch	May 1, 2022

IV. BACKGROUND

No changes.

V. RFP Objectives and Proposer Solution Requirements

Basic Offering:

Replace Item 4 with:

4. Provide offering for Behavioral Demand Response as part of GridSavvy with a target launch date of May 1, 2022.
 - a. Develop customer interface for SCP with SCP branding

- b. Enroll CARE and FERA customers (approximately 44,000 accounts)
- c. Work with SCP to determine event criteria
- d. Send notifications to customers and determine customer participation per event
- e. Measure and report customer savings per event
- f. Assist SCP with incentive structure and administer customer payments/credits.

VI. QUALIFICATIONS AND EXPERIENCE

No changes.

VII. REVIEW PROCESS

Replace section A with:

- A. Proposals will be evaluated based on:
 - 1. Thoroughness and quality of response.
 - 2. Qualifications and experience of the firm and staff.
 - 3. Demonstration of previous work experience aligned with this solicitation.
 - 4. Satisfaction of the Basic Offerings, as described in this RFP.
 - 5. Additional objectives provided, as described in this RFP.
 - 6. Staffing plan and budget.
 - 7. Implementation timeline
 - 8. Quality of references.
 - 9. Stated exceptions to SCP's contract template or insurance requirements.
 - 10. Any other factors SCP deems relevant.

VIII. NEGOTIATIONS AND FINALIZATIONS

No changes.

IX. QUESTIONS REGARDING THE RFP, COMMUNICATION AND ADDENDA

No changes.

X. RFP SUBMITTAL PROCESS

No changes.

XI. RFP SUBMITTAL REQUIREMENTS

Replace in its entirety with:

XI. RFP SUBMITTAL REQUIREMENTS

1. Cover Letter (1 page maximum) – Must contain reference to this solicitation, the legal business name, address, and contact information of the Proposer, and the signature of an individual with the authority to bind the organization or firm.
2. Proposer’s Approach and explanation for how it plans to meet the objectives outlined in Section V and Scope of Services in Attachment A of this RFP.
3. Proposer’s qualifications as per RFP Section VI Qualifications and Experience
4. Relevant Project Experience
 - a. Aggregate capacity (kW) and count of existing ADR customers broken down by Utility Distribution Company (UDC), Load Serving Entity (LSE), state and county location, and device type (exclude customer-specific confidential information).
 - b. Aggregate capacity (kW) and count of existing non auto control customers broken down by UDC, LSE, and state and county location (exclude customer-specific confidential information).
 - c. Demonstration of behavioral demand response customer interface.
 - d. Experience with “bring your own device” integrations
 - e. Experience with administering the CISR process and assisting customers
 - f. Transitioning customers from existing DRP in DRRS
5. Organization chart
6. Primary point of contact, list of key team members, including subcontractors, and roles and responsibilities as they relate to SCP’s scope of work.
7. Project team resumes – Proposer must provide qualifications for all team members, including the principal, company official(s), and other personnel who the Proposer anticipates will be assigned to work on behalf of SCP. This requirement includes, but is not limited to, Proposer’s anticipated subcontractors or teaming partners.
8. Budget – Proposer should describe the compensation structure that Proposer may seek from SCP for services, inclusive of staff time, equipment, materials, travel, administrative/clerical, overhead and other out-of-pocket expenses, if applicable to this contract. Pricing should be broken down by the following categories, with descriptions of the services included in each category:

- Implementation
 - Trade Ally Network development
 - Any per device integration fees
 - Any trade ally fees
 - Ongoing operations including:
 - DRP Services and “event” coordination
 - data reporting
 - customer support
 - Webstore maintenance and coordination
 - CAISO market participant advising (if applicable)
 - Scheduling Coordination Services (if applicable)
 - Other Professional Services hourly rates
9. Implementation timeline indicating expected launch dates for behavioral demand response program and items listed in Section V Basic Offering.
10. Provide a company name, contact name, phone number, and email address for three to five customers that can be contacted about your relevant work for them (LSE, Trade Ally, or large C&I customer). Include a brief description of the project and services provided (DRP, SC, CAISO bidding, etc).
11. Any objections or otherwise sought changes by Proposer to SCP’s Standard Professional Services Agreement set forth in Attachment B (“Form of Agreement”). Objections or changes to the Form of Agreement not set forth in the Proposal are deemed waived by the Proposer.
12. To the furthest extent permitted by law, all litigation, arbitration, administrative proceedings, mediation, or other legal dispute resolution mechanism in which Proposer or any affiliate of Proposer has been involved in over the past five (5) years and the disposition of the same.

XII. GENERAL TERMS AND CONDITIONS

No changes.

XIII. RIGHTS OF SONOMA CLEAN POWER

No changes.

IX. CONFLICTS OF INTEREST

No changes.

ATTACHMENT A SCOPE OF SERVICES

Replace Task 1 with:

Task 1: Implementation

- Develop and launch behavioral response program available to all residential customers, initially enrolling all CARE and FERA customers while providing them with an option to unenroll.
- Integration of existing customers and Trade Allies: Work with SCP and current GridSavvy contract implementer to integrate existing customers and transfer CAISO registration details and Trade Ally integrations if needed. Administer CISR form process, as necessary.
- Once on board, review current GridSavvy program details and provide recommendations for program modification including but not limited to incentive levels, incentive delivery, event duration and frequency, CAISO market participation strategy for enrolled resources, and technology options.
- Work with SCP to develop an Implementation Plan to enroll a minimum of 5 MW of dispatchable demand response capacity in the SCP-branded GridSavvy program by 2026, with continuous annual growth as permitted by SCP program budget. The Implementation Plan will be a roadmap to reach the desired enrolled capacity and include the following elements:
 - Overall approach to program implementation and enrolled capacity target of 5 MW, with subgoal of 0.5 MW of that capacity from enrollment of customers taking service on CARE/FERA rates or customers located in disadvantaged communities within SCP territory
 - Program design
 - Customer segmentation
 - Technology types
 - Trade Ally Network development and customer acquisition strategy
 - Detailed budgets and anticipated spend rates
 - CAISO market participation strategy (if any), including any bidding strategy recommendations
 - SCP is open to implementation approaches to meet this level of enrolled DR capacity, but the Implementation Plan must, at a minimum:
 - Include offerings for both commercial and residential customers
 - Include smart thermostat, EV charging, hot water heater, and battery direct control demand response options for residential customers
 - Include EV charging and commercial battery storage direct control demand response options for commercial customers

- Include a plan for behavioral demand response available to all residential customers
- Provide SCP with the ability to call 10 demand response events per month per enrolled customer
- Maintain existing GridSavvy customers and Trade Allies
- Address Trade Ally network development plan and direct load control in SCP territory
- Describe how GridSavvy enrolled demand response capacity can generate CAISO market or Resource Adequacy (“RA”) value to SCP beyond avoided wholesale energy purchases.
- Advise on the value and risks of utilizing GridSavvy as a CAISO resource and complete Task 5 if deemed appropriate.

Anticipated Deliverables

- Behavioral demand response program launch
- Successful integration of existing customers
- Successful integration of existing Trade Allies
- Implementation Plan

Task 2: Trade Ally Network Development

No changes.

Task 3: Ongoing Operations

No changes.

Task 4: Webstore Maintenance and Coordination

No changes.

Task 5: CAISO Market Participant Advising (if applicable)

No changes

Task 6: Scheduling Coordination Services (if applicable)

No changes

ATTACHMENT B
SCP STANDARD CONSULTING AGREEMENT

No changes.