



# 2019 Request for Proposals for **Scheduling Coordinator Services**

*Peninsula Clean Energy is the locally-controlled electricity provider serving the business and residents of San Mateo County. We are reducing greenhouse gas emissions and offering customer choice at competitive rates.*

**Responses due Monday, July 8<sup>th</sup>, 2019 at 5:00 pm Pacific Time**

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## Attachments

- Supplier Diversity Questionnaire (Optional) – completed by vendor

Peninsula Clean Energy (PCE), a California Joint Powers Authority, is seeking proposals from interested vendors to respond to this RFP.

## 1 RFP Overview

Peninsula Clean Energy Authority (PCE) issues this Request for Proposals (RFP) to seek offers from qualified providers for Scheduling Coordinator (SC) services for a Participating Generator as it becomes interconnected with the California Independent System Operator (CAISO) Balancing Authority Area. The SC services requested is for the new 200 MW Wright Solar Park which has an expected Commercial Operation Date (COD) on 11/29/2019. PCE seeks proposals from qualified SC's who can display previous success in completing the requirements of CAISO's New Resource Implementation process and scheduling similar resources. PCE will evaluate the offers received from this RFP in July and plans to negotiate and execute a contract with the selected proposer by late August. The contract will be taken to PCE's Board of Directors for final approval.

This RFP -

- Provides general background on PCE
- Describes the service sought by PCE (scope of work)
- Provides an opportunity for Proposers to describe their qualifications and assets and explain how they could contribute to services requested

## 2 About Peninsula Clean Energy (PCE)

Peninsula Clean Energy (PCE), a community choice energy (CCE) aggregator, is San Mateo County's official electricity provider. Formed in February 2016, PCE is a joint powers authority, consisting of the County of San Mateo and all twenty of its towns and cities. PCE provides cleaner and greener electricity, and at lower rates, than the incumbent investor-owned utility (IOU), Pacific Gas & Electric Company (PG&E). PCE plans for and secures commitments from a diverse portfolio of energy-generating resources to reliably serve the electric energy requirements of its customers over the near-, mid-, and long-term planning horizons. PCE's programs include advancing the adoption of electric vehicles and transitioning building fossil fuel uses to low-carbon electricity. For more information on PCE, please go to [www.peninsulacleanenergy.com](http://www.peninsulacleanenergy.com).

As part of its mission-driven, collaborative, not-for-profit, locally-focused roots, PCE is committed to the following set of strategic goals:

1. Design a diverse power portfolio that is greenhouse gas free.
  - 100% GHG free by 2021
  - sourced by 100% CA RPS eligible renewable energy by 2025 on a time coincident basis, provided it is economically viable
  - create a minimum of 20 MWs of new local power by 2025
2. Continually strive to offer ECOPlus at rates that are lower than PG&E rates provided it is economically viable.
3. Stimulate development of new renewable energy generation and storage projects in San Mateo County and California through PCE's procurement activities.
4. Demonstrate quantifiable economic and environmental justice benefits to the County/region including by placing a priority on local hiring and inclusionary workforce development practices with a goal of increasing diversity.
5. Implement programs to further reduce greenhouse gas emissions and support the county's community-wide efforts to be completely GHG-free by 2045 by investing in electric transportation, energy efficiency and demand response, and partnering effectively with municipalities, business, schools, and nonprofit/faith organizations.
6. Maximize and maintain customer participation in PCE.
  - Provide a superior customer experience
  - Develop PCE brand awareness and loyalty throughout the County.
  - Actively encourage voluntary participation in its ECO100 renewable energy product
  - Actively encourage participation in other programs PCE develops
  - Achieve recognition as an EPA Green Power Community for all cities and towns in San Mateo County and EPA Green Power Partnership for all cities with municipal accounts enrolled in ECO100 by 2018
7. Build a financially sustainable organization.
  - Build sufficient reserves in a rate stabilization fund
  - Achieve an investment grade credit rating by 2021
8. Foster a work environment that espouses sustainable business practices and cultivates a culture of innovation, diversity, transparency, integrity, and commitment to the organization's mission and the communities it serves.

9. Leverage Peninsula Clean Energy/Silicon Valley expertise and relationships to support innovation across all of PCE's programs and activities.
10. Assist in setting up CCAs in other areas of the state, including where PCE has utility scale generation.

### 3 RFP Schedule

<b><i>Event</i></b>	<b><i>Date</i></b>
RFP Issue Date	June 19, 2019
RFP Questions Due to PCE	June 25, 2019
Response to RFP Questions posted by PCE	July 1, 2019
RFP Submission Deadline	July 8, 2019
PCE Selects Shortlisted Parties	July 12, 2019
PCE Conducts Interviews with Shortlisted Parties	July 19, 2019
PCE Selects Scheduling Coordinator	July 26, 2019
Contract Negotiations	July 29 – August 9
PCE Seeks Board Approval	August 22, 2019
Contract Execution	August 23, 2019

- **Question & Answer:** Proposers may submit questions concerning the RFP at [procurement@peninsulacleanenergy.com](mailto:procurement@peninsulacleanenergy.com) on or prior to June 25, 2019. All questions and answers will be shared with all Proposers and will be posted on PCE's website on July 1, 2019.
- **Offers Due:** Participants' Offers must be submitted by July 8, 2019 at 5:00 PPT, and must include the required documents described below.
- **Offer Review:** PCE will evaluate all Offers according to the criteria listed below. During this phase, PCE will identify submitted Offers for short-listing, and then

notify short-listed Participants. PCE expects to notify short-listed Participants by July 12, 2019.

- **Contract Redline:** Prior to interview, each shortlisted participant will provide a redline of PCE's standard contract terms.
- **Interviews with Shortlisted Participants:** PCE will conduct interviews with Shortlisted Parties at PCE's offices in Redwood City on July 19, 2019.
- **Negotiations and Execution:** PCE will negotiate contracts with the selected Scheduling Coordinator based on the form of consulting agreement distributed with this RFP. The contract with the selected Scheduling Coordinator will be presented at a public meeting to PCE's board for approval.

## 4 Proposal Submittal

Proposals must be received on or before the above deadline and submittal must be by email to [procurement@peninsulacleanenergy.com](mailto:procurement@peninsulacleanenergy.com) with the subject "Proposal - <Vendor Name> - SC Services".

By participating in PCE's RFP process, a Proposer acknowledges that it has read, understands, and agrees to the terms and conditions set forth in these RFP Instructions. PCE reserves the right to reject any offer that does not comply with the requirements identified herein. Furthermore, PCE may, in its sole discretion and without notice, modify, suspend, or terminate the RFP without liability to any organization or individual. The RFP does not constitute an offer to buy or create an obligation for PCE to enter into an agreement with any party, and PCE shall not be bound by the terms of any offer until PCE has entered into a fully executed agreement.

Only electronic submittals will be accepted.

## 5 Content of Response

Interested vendors must submit the following documents (except those marked "Optional") to be considered for awarding of this proposal:

1. Cover Letter with the following elements (1 page):
  - Reference to this RFP

- Legal business name, address, telephone number, and business status (corporation, limited partnership, individual, etc.).
  - Name of vendor's representative with respect to this RFP along with telephone number and email address.
  - A signature of an authorized individual.
2. Approach:
- Describe how you would achieve the Scope of Work described below.
  - Goals and measurable objectives.
  - Technical approach.
  - Key challenges and resolutions.
3. Qualifications and Experience: Submit the following information -
- Must be certified and listed on the CAISO Scheduling Coordinator List: [List of SCs](#), and demonstrate experience in the following:
    - a) Meet scheduling requirements of CAISO and WECC
      - i. 7 day, 24 hour real-time services, including weekends and holidays
      - ii. 7-day per week day-ahead pre-scheduling services
    - b) Use of SIBR, ADS, CMRI, CIRA, Master File User Interface, OMS and other applicable CAISO applications
  - A summary of experience and background acting as a Scheduling Coordinator for Participating Generators, including:
    - a) Years of experience scheduling similar projects in California;
    - b) Number, type and size of projects; and
    - c) Parent Company.
  - Financial Strength of Proposer including the following:
    - a) Credit rating; and
    - b) Financial statements.
  - Describe the experience your organization has in asset management:
    - a) Include how you report on profit and losses, metered volumes, forecasts, schedules, curtailment, outages, weather, etc.
    - b) What methods would you recommend to effectively optimize a VER resource?
    - c) In your experience how have you monitored and avoided scheduling the resource during periods of negative pricing?
  - Any tools your organization uses for sharing scheduling and settlement information with clients.
  - Identification of relevant licenses and certifications.
  - Optional: PCE may consider adding storage to the project at a later date.

- a) Describe the experience your organization has in scheduling and dispatching solar + storage resources.
- b) Describe the experience your organization has in scheduling resources in the Ancillary Services Market.
- c) Describe your organization's experience optimizing a battery between energy and ancillary services markets.

4. References:

- Contact information for three (3) references from work performed in the last three years. Please include scope of work, dates of contract, contract amount, contact person, telephone number, and email address

5. Certificates of Insurance for the following coverages:

- Commercial General Liability – for bodily injury, property damage, and personal injury \$1,000,000 – each occurrence \$2,000,000 – in aggregate
- Business Automobile Liability – “any auto” (Company Vehicles) – At least \$1,000,000
- Personal Automobile Liability – “any auto” (Personal Vehicles) – At least \$500,000
- Worker's Compensation and Employer's Liability (EPL)– injury or death, each accident At least \$1,000,000 (EPL not required for Sole Proprietor)

6. Supplier Diversity Questionnaire (Optional): PCE's Supplier Diversity Questionnaire is attached to this RFP. Please note, your response (or lack thereof) will have no impact on your contract status or eligibility to work with PCE in accordance with state law.

7. Proposed Schedule for implementation (table or chart, 1 pg. max)

8. Cost Proposal detailing all costs associated with the services being offered (2 pg. max, include rate schedule, if applicable)

9. Proposer staff credentials (no page limit)

## 6 Review and Selection Process

Evaluation will be based on a combination of quantitative and qualitative criteria. PCE will evaluate each Offer against these criteria and select a subset of Offers to move to the Shortlist phase. The most qualified individual or firm will be recommended by the

RFP Evaluation Committee based on the overall strength of each proposal, and the evaluation is not restricted to considerations of any single factor such as cost. The criteria used as a guideline in the evaluation will include, but not be limited to, the following:

1. Qualifications and experience of the entity, including capability and experience of key personnel and experience with other public and/or private agencies to provide these services
2. History of successfully performing services for public and/or private agencies and other CCA's
3. Financial viability of proposer
4. Completeness of the proposed approach, including clarity of understanding of the scope of services to be provided and appropriateness of the proposed solution/services
5. Experience in asset management – reporting and analyzing data specific to the Participating Generator
6. Ability to meet any required timelines or other requirements
7. Existence of and circumstances surrounding any claims and violations against you or your organization
8. Cost to the PCEA for the primary services described by this RFP
9. References

## 7 Agreement Terms

Awardees will be required to enter into a contract using PCE's standard contract terms. Modification of the contract terms may be proposed by the Proposer for consideration by PCE but are not guaranteed to be accepted. Rejection of the final terms from PCE is grounds for disqualification. Shortlisted participants will be required to provide any redlines to the standard terms ahead of the interview phase.

PCE's standard contract terms are available for review here:

<https://tinyurl.com/pcecontractemplate>

## 8 Supplier Diversity

Consistent with its strategic goals, PCE has a strong commitment to foster a work environment that espouses sustainable business practices and cultivates a culture of innovation, diversity, transparency, integrity, and commitment to the organization's mission and the communities it serves. As part of that goal, PCE strives to ensure its use of vendors and suppliers who share its commitment to sustainable business and inclusionary practices.



To help ensure an inclusive set of vendors and suppliers, PCE's policy requires it to:

1. Strive to use local businesses and provide fair compensation in the purchase of services and supplies;
2. Proactively seek services from local businesses and from businesses that have been Green Business certified and/or are taking steps to protect the environment; and
3. Engage in efforts to reach diverse communities to ensure an inclusive pool of potential suppliers.

General Order 156 (GO 156) is a California Public Utilities Commission ruling that requires utility entities to procure at least 21.5% of their contracts with majority women-owned, minority-owned, disabled veteran-owned and LGBT-owned business enterprises' (WMDVLGBTBEs) in all categories. Qualified businesses become GO 156 Certified through the CPUC and are then added to the GO 156 Clearinghouse database. The CPUC Clearinghouse can be found here: [www.thesupplierclearinghouse.com](http://www.thesupplierclearinghouse.com).

While PCE is not legally-required to comply with GO 156, PCE's policies and commitment to diversity are consistent with the principles of GO 156, and, therefore, respondents to this RFP are asked to voluntarily disclose their GO 156 certification status as well as their efforts to work with diverse business enterprises, including those owned or operated by women (WBE), minorities (MBE), disabled veterans (DVBE), and lesbian, gay, bisexual, or transgender people (LGBTBE).

As a public agency and consistent with state law, PCE will not use any such provided information in any part of its decision-making or selection process. Rather, PCE will use that information solely to help evaluate how well it is conforming to its own policies and goals.

***Pursuant to California Proposition 209, PCE does not give preferential treatment based on race, sex, color, ethnicity, or national origin.***

## 9 PCE Legal Obligations

PCE is not obligated to respond to any offer submitted as part of the RFP. All parties acknowledge that PCE is a public agency subject to the requirements of the California Public Records Act, Cal. Gov. Code section 6250 et seq. PCE acknowledges that another party may submit information to PCE that the other party considers confidential, proprietary, or trade secret information pursuant the Uniform Trade Secrets Act (Cal. Civ. Code section 3426 et seq.), or otherwise protected from

disclosure pursuant to an exemption to the California Public Records Act (Government Code sections 6254 and 6255) (“Confidential Information”). Any such other party acknowledges that PCE may submit to the other party Confidential Information. Upon request or demand of any third person or entity not a party to this RFP (“Requestor”) for production, inspection and/or copying of information designated as Confidential Information by a party disclosing such information (“Disclosing Party”), the party receiving such information (“Receiving Party”), as soon as practical but within three (3) business days of receipt of the request, shall notify the Disclosing Party that such request has been made, by telephone call, letter sent via email and/or by US Mail to the address or email address listed on the cover page of the RFP. The Disclosing Party shall be solely responsible for taking whatever legal steps are necessary to protect information deemed by it to be Confidential Information and to prevent release of information to the Requestor by the Receiving Party. If the Disclosing Party takes no such action, after receiving the foregoing notice from the Receiving Party, the Receiving Party shall be permitted to comply with the Requestor’s demand and is not required to defend against it.

## 10 General Terms and Conditions

1. PCE’s Reserved Rights: PCE may, at its sole discretion: withdraw this Request for Proposal at any time, and/or reject any or all materials submitted. Respondents are solely responsible for any costs or expenses incurred in connection with the preparation and submittal of the materials for this RFP.
2. Public Records: All documents submitted in response to this RFP will become the property of PCE upon submittal and will be subject to the provisions of the California Public Records Act and any other applicable disclosure laws.
3. No Guarantee of Contract: PCE makes no guarantee that a contractor and/ or firm added to the qualified vendor list will result in a contract.
4. Response is Genuine: By submitting a response pursuant to this RFP, Respondent certifies that this submission is genuine, and not sham or collusive, nor made in the interest or on behalf of any person not named therein; the submitting firm has not directly or indirectly induced or solicited any other submitting firm to put in a sham bid, or any other person, firm or corporation to refrain from submitting a submission, and the submitting firm has not in any manner sought by collusion to secure for themselves an advantage over any other submitting firm.

## 11 Detailed Project Description & Scope

### Project Overview:

Wright Solar Park, LLC is a new 200 MW solar photovoltaic project currently under construction in Merced County. The project expects to begin commercial testing with CAISO in November 2019 and achieve COD on 11/29/2019. PCE has the contractual right to schedule and bid the resource into CAISO and intends for the SC to act as its agent to perform the necessary services. This project will only be scheduled under one Resource ID.

Resource Name: Wright Solar Freeman

Resource Type: Solar Photovoltaics

Size: 200 MW

Location: Merced County, CA

Point of Delivery: Padre Flat Switching Station 230kv Bus

Est. Implementation Date: 10/27/2019

Planned COD: 11/29/2019

### **Scope of Work:**

- 1) Selected participant will act as the Scheduling Coordinator for the Participating Generator in compliance with the CAISO Tariff. The selected participant will develop schedules, transmit the schedules to the Control Area Operator and act on instructions received
- 2) Meet scheduling requirements of CAISO and WECC:
  - a. 7 day, 24 hour real-time services, including weekends and holidays
  - b. 7-day per week day-ahead pre-scheduling services
- 3) Provide dispatch management and act as interface between the plant operator and the Control Area Operator; meeting all DOT, outage, and curtailment notices
- 4) Consult with client on strategic bidding strategies to maximize CAISO revenue and/or minimize exposure; e.g., optimizing the resource in the Day-Ahead Market (DAM) and Real-Time Market (RTM); reducing curtailment risk and exposure to negative pricing
- 5) Develop, submit and adjust schedules and bids into the CAISO Day-Ahead Market (DAM) and Real-Time Market (RTM)
- 6) Scheduling resources under the CAISO prevailing protocols for interconnected variable energy resources (VERs)
- 7) Participate in CAISO's New Resource Implementation process
  - a. Able to meet the SC requirements listed on the New Resource Implementation Checklist provided by CAISO
  - b. Work closely with the Interconnect Customer (IC) and Operation Control Center for Participating Generator in following CAISOs "Bucket" system requirements prior to achieving Commercial Operation
  - c. Set up trial operation for Initial Synchronization in order to be approved for Commercial Operation

- 8) Manage, record, and coordinate planned and unplanned outages effectively in the Outage Management System (OMS) in accordance with the CAISO Tariff
- 9) Obtain, document, and regularly audit settlement quality meter data in accordance with the CAISO Tariff
- 10) Coordinate and submit annual and monthly Resource Adequacy Supply Plans to the CAISO through CIRA
- 11) Monitor POSO notifications from CAISO and perform substitution requests in CIRA when necessary
- 12) Provide settlement services
  - a. Calculate, bill, and collect any pass-through charges owed to CAISO and pass-through payments credited from CAISO
  - b. Review charges/revenues on settlement statements for accuracy and resolve any discrepancies
  - c. Receive or remit payments on behalf of PCE for all CAISO Invoice and Payment Advices on a weekly basis or pursuant to the CAISO Payment Calendar
- 13) Collect and report the following resource data in hourly and five-minute intervals, when applicable
  - a. CAISO shadow settlements with description of the charges types and how they are applied to the scheduled and metered volumes
  - b. VER forecasts for Participating Generator
  - c. Bids and Self-Schedules submitted to SIBR
  - d. Day-ahead and Real-time Market Awards shown in CMRI
  - e. CAISO Meter Data in MWh's
  - f. Imbalance MWh's between Actual and Scheduled
  - g. Day-Ahead and Real-Time LMP's broken down by the three price components; LMP price, congestion, and losses
- 14) Provide services under a PCE-specific SCID
- 15) Formally submit disputes or questionable charges associated with the Participating Generator through CAISO's dispute process
- 16) Document communications with CAISO, transmission operators and the plant operator, including but not limited to information requests, outage notifications, validation errors, and general notices
- 17) Comply with all requirements of the CAISO Tariff
- 18) Term of Services—
  - a. PCE will agree to a contract term of one year with the option to extend the contract on an annual basis.

## **PCE Supplier Diversity Questionnaire (Optional)**

Providing information in this questionnaire is optional. As a public agency and consistent with state law, PCE will not use any such provided information in any part of its decision-making or selection process.

### **Contact information:**

Business Name	
Email address	
Phone number	
Where is your business located/headquartered?	

### **Labor Diversity:**

1. Is your business certified under General Order 156 (GO 156)?

- Yes
- No
- Qualified as WMDVLGBTBEs, but not GO 156 Certified

If you answered either "Yes" or "Qualified" above, please choose all categories that apply below.

- Woman-owned
- Minority-owned
- Disabled Veteran-owned
- LGBT-owned

2. Does your business use subcontractors that are certified under GO 156?

- Yes
- No
- Qualified as WMDVLGBTBEs, but not GO 156 Certified

If you answered either "Yes" or "Qualified" above, please choose all categories that apply below.

- Woman-owned
- Minority-owned
- Disabled Veteran-owned
- LGBT-owned

3. Does your business have hiring targets of minority-owned, women-owned, LGBTQ-owned, or disabled veteran-owned subcontractors?

- Yes
- No
- Not applicable

**Labor Agreements:**

This section of questions focuses on the labor agreements of your business. If your business/contract with PCE does not have a labor component, please answer "not applicable."

1. Does your business have history of using local-hires, union labor, or multi-trade project labor agreements?

- Yes, within PCE's service area of San Mateo County
- Yes, CA-based labor, but not local to PCE's service area of San Mateo County
- No
- Not applicable

If you answered "Yes, within PCE's service area of San Mateo County" above, please provide the percentage of labor agreements with local, union, and multi-trade labor (if available) and describe past efforts.

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If you answered "Yes, CA-based labor, but not local to PCE's service area of San Mateo County" above, from where in California is the labor sourced?

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2. In your proposed contract with PCE, does your business plan to use local hires, union labor, or multi-trade project labor agreements?

- Yes
- No
- Not applicable

If you answered “Yes” above, please quantify the number of such labor agreements and explain.

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3. Does your business pay workers prevailing wage rates or the equivalent?

Prevailing wage in California is required by state law for all workers employed on public works projects and determined by the California Department of Industrial Relations according to the type of work and location of the project. To see the latest prevailing wage rates, go to [www.dir.ca.gov/Public-Works/Prevailing-Wage.html](http://www.dir.ca.gov/Public-Works/Prevailing-Wage.html)

- Yes
- No
- Not applicable

4. In your proposed contract with PCE, does your business pay and/or plan to pay prevailing wages or the equivalent?

To see the latest prevailing wage rates, go to [www.dir.ca.gov/Public-Works/Prevailing-Wage.html](http://www.dir.ca.gov/Public-Works/Prevailing-Wage.html)

- Yes
- No
- Not applicable

5. Does your business support and/or use apprenticeship programs?

- Yes
- No
- Not applicable

If you answered "Yes" above, please describe the apprenticeship programs your business plans to use.

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6. Does your business employ workers and/or use businesses from PCE's service area of San Mateo County?

- Yes
- No

If you answered "Yes" above, please quantify the number of workers/businesses, the businesses used, and in which communities the workers or business reside.

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**Equity, Diversity, Inclusion, and Environmental Justice:**

PCE is committed to equity, diversity, inclusion, and environmental justice both within our organization and within our communities.

1. Does your business have initiatives to promote workplace diversity?

- Yes
- No

If you answered "Yes" above, please describe such initiatives or provide any supporting statistics or documentation for diversity within the business.

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2. What other efforts related to equity, diversity, inclusion, or environmental justice does your business pursue?



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3. If there is anything else related to supplier diversity that is not captured in your answers above, please describe below:

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