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**Request for Proposals for**

**Load and Resource Scheduling Coordinator Services**

**Battery Energy Storage System Optimization & Performance Measurements**

**Load and Price Forecasting Services**

**Congestion Revenue Rights Portfolio Management**

**Q&A Responses**

***July 20, 2023***

**Responses are due July 31, 2023 5 PM Pacific Daylight Savings Time (PDT)**

**RFO Website:** <https://www.peninsulacleanenergy.com/solicitation/2023-rfp-for-scheduling-coordinator-and-related-services/>

# **Q&A Responses for Scheduling Coordinator and related Services**

**Question 1:** Would you please provide the entity name and contact information of the partner responsible for billing, enrollment, and drops?

**Response:** Calpine Energy Solutions provides customer meter data management and billing support to Peninsula Clean Energy. If bidders have specific questions that they want to ask Calpine Energy Solutions, those questions should be funneled through Peninsula Clean Energy to be shared with all respondents.

**Question 2:** Is there a preference for respondents that bid on the entire package or multiple tasks, and if so, would you please indicate if there is any prioritization made to the various tasks?

**Response:** Yes. Peninsula Clean Energy prefers bids with combined package(s). Especially, Task 1: Scheduling Coordinator (SC) Services, Task 2: Battery Energy Storage Systems (BESS optimization), and Task 5: Congestion Revenue Rights Portfolio Management Services (CRR Management).

**Question 3:** Please provide details about how data will be shared between entities if multiple respondents are awarded different tasks.

**Response:** The details need to be worked out during the contract negotiation phase.

**Question 4:** Will responses to this RFP be publicly available, and if so, how will those responses be made public?

**Response:** Peninsula Clean Energy does not intend to make the responses to the RFP public, but since Peninsula Clean Energy is a public entity, all the responses are subject to Public Record Acts.

**Question 5:** Can you confirm the resources where Peninsula Clean Energy is listed as the SC in the resource portfolio in Section 2.1 of the RFP will need to be bid and scheduled by Peninsula Clean Energy’s SC agent?

**Response:** That is correct.

**Question 6:** Can you confirm the resources where the seller is listed as the SC in the resource portfolio in Section 2.1 of the RFP will be bid and scheduled by the seller’s SC, but incorporated by the Peninsula Clean Energy’s SC agent in the overall resource portfolio strategy?

**Response:** That is correct.

**Question 7:** Does Peninsula Clean Energy need access to the SC agent’s ETRM system for trade capture?

**Response:** Potentially yes.

**Question 8:** For any pseudo tie, dynamically scheduled, or import schedule resources, does Peninsula Clean Energy require the SC agent to procure transmission service should transmission service be required to deliver power into the CAISO BAA?

**Response:** No.

**Question 9:** Can you confirm that Peninsula Clean Energy will cash settle with CAISO for load and generation/storage? Will Peninsula Clean Energy pay CAISO invoices rather than the SC?

**Response:** Yes. Peninsula Clean Energy will cash settle directly with CAISO for load and with its counterparties for generation/storage. The SC agent will need to perform validation of the CAISO invoices before Peninsula Clean Energy pays CAISO.

**Question 10:** Will Peninsula Clean Energy have any future restrictions placed on the winner of this solicitation? For example, can the selected SC agent freely participate in future energy, RA, or REC solicitations and perform as a supplier of these commodities to Peninsula Clean Energy? Or will the selected SC be excluded to prevent potential conflicts?

**Response:** No. However, Peninsula Clean Energy expects the respondents to have and can demonstrate their internal segregation of duties between the SC agent service group and its energy marketing groups.

**Question 11:** How will Peninsula Clean Energy be using the Day-Ahead and Short-Term price forecast? Does Peninsula plan on becoming a Convergence Bidding Entity to participate in Convergence Bidding? If so, what will be the main objectives in participating in that financial market?

**Response:** Peninsula Clean Energy plans to use this service to plan for the potential convergence bidding, as well as to inform resource bidding including BESS. The purpose of performing convergence bidding is to take advantage of the price difference between D/A and R/T, particularly when the BESS projects come online.

**Question 12:** What is the purpose of the Performance Assurance in section 7.2 of the RFP and is it required? Do respondents need to have a credit rating to be considered?

**Response:** The purpose of Performance Assurance is to ensure the quality of services that the contractors perform. Not being rated does not disqualify a respondent from being considered. The details can be addressed in the contract negotiation phase.

**Question 13:** Regarding Appendix A, Task 1.B.1.f, the Resource SC is to receive instructions from the “BESS Consultant”, could you please confirm whether this is the entity that you will select to provide services under Task 2 BESS Bidding Optimization and Performance Measurement? If not, will the “BESS Consultant” be a single entity for all resources that include BESS (hybrid and standalone), or could there be more than one “BESS Consultant” providing services for a subset of the BESS resources?

**Response:** Correct, the "BESS consultant" is the one chosen for Task 2. Peninsula Clean Energy's strong preference is for a single entity to provide BESS consulting services.

**Question 14:** Appendix A, Task 1.C.1.a refers to “auditing” SQMD. Does this refer specifically to CAISO’s annual SC audit exercise, and/or the ongoing process of validation, error identification, estimation, or something else? If something else, could you please describe the requirement(s) and typical audit frequency?

**Response:** It's referring to the ongoing validation process, in addition to any SC audit exercise.

**Question 15:** Appendix A, Task 1.D.d.ii identifies several possible objectives such as maximizing revenue, minimizing exposure, and minimizing curtailment risk/negative pricing some of which may conflict with others. Concerning resources including BESS (hybrid and standalone) do you anticipate identical objectives apply across all BESS hybrid and standalone resources? Or is each specific BESS resource likely to have unique optimization objectives?

**Response:** Peninsula Clean Energy understands that there is a conflict between the different objectives. We expect the SC agent to be able to work with Peninsula Clean Energy and adapt to different priorities from time to time. Peninsula Clean Energy anticipates the identical objective applied across all BESS resources when such priorities change.

**Question 16:** Does Peninsula Clean Energy anticipate that BESS resources which bid into the ancillary services markets, may include strategies for self-supply of required portfolio ancillary services?

**Response:** Peninsula Clean Energy does not yet have a BESS bidding strategy. The strategy will be developed with the BESS consultant described in Task 2, and the strategy may change from time to time.

**Question 17:** Regarding Appendix A, Task 2.3.b, is it likely that the processes and interface(s) used to gather resource-specific BESS data will vary by resource? In other words, is it possible that some BESS resource(s) will use software interfaces and/or contracted service providers that may be unique to the specific resource(s)?

**Response:** BESS data will be collected by the Sellers’ Battery Management Systems and relayed to Peninsula Clean Energy. Sellers’ Battery Management Systems may vary.

**Question 18:** Is the paired resource scheduled to come online in December 2023 planned to be a single resource hybrid or Co-located?

**Response:** It is currently a hybrid resource.

**Question 19:** Can you please confirm what format the MDMA will provide meter data to the SC? In other words, is the MDMA performing the estimation, and editing on the underlying account level data, applying T&D losses, and providing the aggregated meter data in a format that can submit to MRI-S? If not, can you please elaborate on the SQMD functions expected of the SC for load?

**Response:** Calpine Energy Solutions provides load meter data management and submits to CAISO directly. The SC agent needs to pull the data from CAISO.

**Question 20:** Is the assumption that every resource in the portfolio should be considered for optimization unless otherwise impractical?

**Response:** That is correct.