# ADDENDUM NUMBER 1: QUESTIONS AND ANSWERS

# FOR

# REQUEST FOR PROPOSALS FOR MANAGED EV CHARGING PROGRAM PARTNER

**July 25, 2025**

Question #1: How are customers validated? Is there access to your customer information system?

Answer #1: Via customer list flat file provided by SVCE via SFTP/box or connection to SVCE's Google Cloud Storage bucket.

Question #2: What is the current OEM composition and where would SVCE like to see this going forward? Have you seen integrations being the limiting factor? Is there a certain integration you are looking for?

Answer #2: The full list of integrations can be found on the GridShift webpage. A large fraction of the user base are Teslas, but SVCE is interested in diverse and reliable OEM integrations. SVCE does not have a specific target integration, but is more interested in a variety of integrations to enable more EV drivers from all of our communities to participate, whether that be (ideally) through vehicle or smart charger integrations.

Question #3: Is the SaaS model 100% the model that SVCE is contracting with? Is SVCE interested in any type of owned solutions?

Answer #3: SVCE is open to any solution approach. If there is a pathway where SVCE would own it, we would be happy to consider that as an option. We do not intend to limit it to just SaaS options.

Question #4: Around innovation, what is the appetite to changing the bones of the structure in terms of event-based versus something more continuous? For example, doing an EV submetered discount tariff for all EV charging vs. rewarding people for participating in certain peak events.

Answer #4: SVCE is open to innovations like this or features that would allow us to test out such features. However, we want to retain some sort of continuous optimization to help customers manage their charging and bills. We would not want to move to a purely event-based solution, but would want to retain some events (e.g. low carbon events, Critical GridShift Hours).

Question #5: What are some of the biggest lessons learned? What are some insights you are hoping to see in the responses?

Answer #5: SVCE would like to continue focusing on: measurable impacts (e.g. aligning baselining methodology with that of SVCE and its third-party EM&V vendors); retention of active users (including defining "active user") and continuous user engagement; ability to pilot custom price signals within the platform; a pricing

structure that is conducive to growing GridShift enrollment to the maximum possible level.

Question #6: Re: CAISO DRRS, are currently registered users in DRRS?

Answer #6: GridShift users are not in CAISO DRRS and do not need to be entered into DRRS. GridShift is a load-modifying program, not market-integrated. The reference to CAISO DRRS in the RFP is for a dual enrollment check to ensure that GridShift users are not enrolled in a third-party demand response program. If they are enrolled in another program according to DRRS, then they are not eligible to participate in our summer Critical GridShift Hour events.

Question #7: How is the baseline defined for the steady-state charging optimization?

Answer #7: SVCE's goal is for the GridShift vendor's baselining methodology to align with the methodology used by SVCE and its third-party EM&V vendors. See the GridShift pilot EM&V report for an example of a baselining methodology carried out by one of SVCE's EM&V vendors: https://svcleanenergy.org/wp-content/uploads/ev.energy-GridShift-EMV-Report-Final_digital.pdf. SVCE is interested in learning about the proposers' baselining methodologies, and is open to adopting a new methodology. Baselining is important to SVCE to accurately understand the influence we are having through this program offering, both the steady-state optimization and events.

Question #8: Are you running any other programs, like thermostats and batteries? Do we have to worry about conflicts there?

Answer #8: SVCE is working on a broader demand flexibility portfolio, which will include a variety of assets in the home. For GridShift, our intent is to use vehicle/charger telematics to understand load shift. We shouldn't have to worry about conflict in terms of the actual meter analysis, but if your solution depends on the home's meter itself and measuring impacts there, there may be a methodology we can use to tease it out.

Question #9: Is the platform limited to home charging, or can we include charging anywhere in SVCE territory (e.g. workplace charging)?

Answer #9: We would love to hear about this from an innovation standpoint and are open to a broader impact.

Question #10: For the incentive structure, are you open to on-bill credits per kWh for off-peak charging?

Answer #10: Yes, if this is something the proposer has implemented in other solutions, SVCE would love to hear more about it.

Question #11: Who is your billing provider?

Answer #11: Calpine Energy Solutions.

Question #12: How heavily does SVCE weigh first party vs. second party integrations?

Answer #12: SVCE does not have a weighting between the two; we are interested in the reliability of the integration (e.g. data quality, data timeliness, charging control). If different integrations in your solution differ in their reliability, please indicate this in your proposal.

Question #13: The RFP states that SVCE may select different bidders for different sections. How do you see this working across platforms/vendors?

Answer #13: While SVCE's intent is to select one bidder, this option to select multiple bidders gives us the flexibility to select a solution that involves multiple proposals or vendors.

Question #14: Can you elaborate on the pricing structure you are looking for?

Answer #14: The pricing structure should be conducive to scaling the program. This is related to the baselining question (i.e. understanding value to SVCE per EV vs. what SVCE pays to control the EV) as well. We believe our interests are aligned with that of the vendors', in that we would like to reach as many EVs as possible and providing benefits to customers. We can only do that if it financially makes sense to SVCE. When evaluating pricing structure, we will look at both value to SVCE and value to the customer.

Question #15: Will the webinar attendee list be posted?

Answer #15: SVCE does not typically post this.

Question #16: Do you have any mechanism to get compensated for doing the right thing for the distribution grid? If there was a regulatory mechanism available, would SVCE be willing to entertain something there?

Answer #16: SVCE is not aware of a direct mechanism to receive compensation for managing its connected EVs in a way that benefits the distribution grid. SVCE has explored whether its connected EVs could be used to help avoid distribution system upgrades and provide other benefits, and is interested in dispatching its connected EVs in that way. But thus far the best signal SVCE is aware of is via the hourly flex pricing pilots, in which the value is passed directly to the customer. SVCE is interested in value accruing to the customer and in part to SVCE for the service of the free app. Proposers are encouraged to share any ideas on this topic, as SVCE is very interested in innovating and optimizing for the distribution system as well to reduce overall customer costs.

Question #17: What is SVCE's appetite for program structures beyond the current GridShift program?

Answer #17: SVCE would like to retain the minimum requirements of the existing GridShift program, but is open to additional enhancements or modifications to it.

Question #18: Which value streams is SVCE particularly keen on obtaining? (ex/ distribution, peak shift, etc)

Answer #18: Energy and resource adequacy value are the two clearest value streams for SVCE to tap into.

Question #19: Can you give detail on methodology for "making sure pricing structure is aligned with value"?

Answer #19: See Question 14.

Question #20: How many enrolled customers do you hope to achieve during each year of the contract?

Answer #20: SVCE expects the vendor to propose an enrollment target as part of Task 2, based on their understanding of the available market and recruitment rates. SVCE's goal is to reach as many EVs as possible so long as the value per EV is commensurate with the cost per EV.

Question #21: Can SVCE please clarify what it is the additional “Administrative Information” that is to be submitted in this section, beyond the “name, mailing address, phone number, and email of designated point of contact”?

Answer #21: The minimum requirements are what is expected for this section.

Question #22: Can SVCE please confirm that full resumes of key staff are exempt from the two page maximum for the Organization description and qualifications section?

Answer #22: Correct, resumes of key staff do not count toward the page limit.

Question #23: Will we only be optimizing against the SVCE portion of the bill or will we also need to factor in variable transmission/distribution charges from PG&E (if applicable)?

Answer #23: For the standard program offering, the vendor will be optimizing against the SVCE portion of the bill. SVCE is interested in exploring additional optimizations against other portions of the bill in its pilot cohort. Ultimately, SVCE's interest is both in seeing value to SVCE and value to the customer - for the latter, consideration of the transmission/distribution portions of the bill may be required.

Question #24: Will SVCE be providing the customer’s applicable tariff upon enrollment or will we need to get this information directly from the customer?

Answer #24: The customer's tariff will be available in the customer file supplied by SVCE. The vendor will need to propose a method to securely receive this customer file and check it on a regular (e.g. weekly) basis to ensure that the customer's tariff is up to date.

Question #25: RFP states that “users can choose to participate in additional seasonal events: Critical GridShift Hours in the summer months to reduce demand during times of grid stress, and low-carbon events during the remainder of the year to charge when carbon-free energy is most abundant on the grid”. Can SVCE please confirm if Supplier is expected to give customers optionality to “opt-in” to these additional events? Or can Suppliers take an “opt-out” approach?

Answer #25: Vendors can take an "opt-out" approach. Note that for Critical GridShift Hours, users who are enrolled in a third-party demand response program are not eligible to participate in events. See Question 6 for more info.

Question #26: How is baselining determined? i.e., what baselining methodology is used?

Answer #26: See Question 7.

Question #27: Can SVCE please confirm how it defines “inactive users”? Are they users that are not actively managing their charging or users that may have turned off telematics connections?

Answer #27: While SVCE does not have a formal definition for inactive users, an "enrolled" EV/user is defined as one whose EV/smart charger is still connected with the GridShift app. An active user is one that is actively engaged with the app in some fashion, while an inactive user may be enrolled but hasn't taken any app-driven actions for some amount of time.

Question #28: Will the test customers need to enroll in a separate program to be included in the custom price signals? Will there be separate terms and conditions for this?

Answer #28: Ideally, the pilot customers would enroll in the same platform, but their user interface would be customized to accommodate the tracking of hourly savings and any other features not included in the standard program. There may be separate terms and conditions for the pilot cohort.

Question #29: How many customers are currently enrolled in the GridShift platform? What is their composition of enrolled asset (EV and/or EVSE).

Answer #29: There are currently around 1,500 EVs enrolled in GridShift. The majority of these EVs are connected via vehicle telematics, and the majority of vehicles are Tesla. See the GridShift website for a full list of current integrations: https://svcleanenergy.org/gridshift-ev/.

Question #30: How many users are currently active in the GridShift program, and how many do you expect to retain during the transition?

Answer #30: There are currently around 1,500 EVs enrolled in GridShift. SVCE would like to retain as many users as possible in the transition to the new platform, and we expect the vendor to provide an estimate of retention % in their proposal for Task 2.

Question #31: Are there any specific EV OEMs that must be supported in our proposed solution?

Answer #31: No; however, SVCE's goal is to transition as many current GridShift users to the new platform as possible. See the GridShift website for a list of current integrations: https://svcleanenergy.org/gridshift-ev/.

Question #32: What system or platform does SVCE use for its data warehouse, and what type of API or format should we use to integrate with it?

Answer #32: SVCE uses Google Cloud Platform (GCP). If integrating with GCP, the preferred method is for the vendor to connect to a Google Cloud Storage bucket to retrieve regular uploads of customer list CSV files.

Question #33: Will SVCE provide access to CAISO Flex Alerts and emissions data, or should we handle this ourselves?

Answer #33: These integrations should be handled by the vendor.

Question #34: What is the preferred mode of submission for the demo video? Can we include a link in our proposal?

Answer #34: Yes, a link in the proposal is fine.

Question #35: Do you have a specific cost template we should follow, or should we create our own based on your cost section?

Answer #35: Please refer to Section 5 #7 and Exhibit A of the RFP.