



REQUEST FOR PROPOSALS

RFP #2026-005

Qualified Firms for Data Manager and Customer Contact Center

Notice of Addendum No. 1

In accordance with RFP Section VI (General Covenants — Rights of CEA), Clean Energy Alliance amends the RFP as follows:

1. Amended Section V (Selection)

The following language has been corrected:

Previous:

“CEA expects to expeditiously finalize the PSA terms and present the agreement to the CEA Board at its January 28, 2027 Board meeting.”

Corrected:

“CEA expects to expeditiously finalize the PSA terms and present the agreement to the CEA Board at its March 25, 2027 Board meeting.”

2. Amended Section VI (Schedule)

The RFP schedule is extended by one week as follows. The Board presentment date is not affected by this extension:

Milestone	Previous Date	Revised Date
Deadline for written questions	August 31, 2026	August 31, 2026 (unchanged)
Responses to written questions (email)	September 8, 2026	September 14, 2026
Submittal due date	September 25, 2026	October 2, 2026, at 5:00 PM PDT

Milestone	Previous Date	Revised Date
Evaluate Proposals (interviews if needed)	September 28 – October 23, 2026	October 5, 2026 – October 30, 2026
Notice of Intent to Award/Selection	October 30, 2026	November 6, 2026
Contract to Board for Award/Selection	March 25, 2027	March 25, 2027 (unchanged)
Expected Commencement of Work	June 1, 2027	June 1, 2027 (unchanged)

3. Amended Section II (Scope of Services), Item 1(a) and Section 1 Response Narrative

The following language has been added to Item 1(a) (Utility Transaction Processing and Interface Management):

Previous:

“Utility Transaction Processing and Interface Management: Provide a proven, automated Electronic Data Interchange (EDI) transaction management platform capable of processing all standard market transactions with SDG&E. This includes, but is not limited to, managing customer account enrollments, processing drop requests, move-ins/move-outs, and customer-initiated services changes.”

Revised:

“Utility Transaction Processing and Interface Management: Provide a proven, automated Electronic Data Interchange (EDI) transaction management platform capable of processing all standard market transactions with SDG&E. This includes, but is not limited to, managing customer account enrollments, processing drop requests, move-ins/move-outs, and customer-initiated services changes. Given the volume and complexity of CEA's EDI transaction processing (including 814, 867, 810, and 820 transaction types) across approximately 255,000 customer accounts, CEA considers demonstrated, hands-on EDI experience with SDG&E or a comparable California IOU to be critical to successful performance of this scope of work.”

The following language has been added to the Response Narrative at the end of Section 1:

Added:

“Respondents should specifically describe their process for detecting missing, short, long, or duplicate EDI files by transaction type, their reconciliation methodology for validating current transactions against prior EDI history by Service Delivery Point, and should provide a specific example of an EDI data exception or discrepancy they identified and resolved for a similarly-sized utility or CCA client, including the approximate time to resolution.”

4. Amended Section IV (Proposal Requirements — Proposed Budget and Cost of Services)

The following language has been added:

Previous:

“Proposed budget and cost of services: Include an estimated budget and fee itemization by year and task including travel or other expenses. Include all costs that may be relevant to the scope of required

services, and start-up costs, if any. List any flexible invoicing terms that can minimize initial start-up capital requirements.”

Revised:

“Proposed budget and cost of services: Include an estimated budget and fee itemization by year and task including travel or other expenses. Include all costs that may be relevant to the scope of required services, and start-up costs, if any. List any flexible invoicing terms that can minimize initial start-up capital requirements. Cost proposals must be structured on a per-account basis (i.e., a fee expressed per distinct CEA customer account as defined as the unique combination of an IOU account number and Service Delivery Point and not a per customer meter fee structure), whether fixed, variable, or a combination of both. Respondents must further itemize and separately state total proposed fees and/or compensation pertinent to (a) Data Management and related services (RFP Sections 1, 2, 4, and 5) and (b) Customer Contact Center services (RFP Section 3) independently, so that CEA may evaluate the cost of each scope of service independently, regardless of whether a Proposer submits a single combined proposal covering both.”

5. Amended Section III (Questions)

The following language has been added to the end of Section III:

“CEA reserves the right to decline to respond to any question that CEA determines, in its sole and absolute discretion: (a) is not relevant to the preparation of a responsive proposal, (b) would require disclosure of confidential, proprietary, or trade secret information, (c) is readily available from publicly available sources, (d) appears to have been generated by artificial intelligence tools rather than reflecting a genuine inquiry from the Proposer, (e) seeks information that a Proposer with relevant industry expertise and experience providing the services described in this RFP would reasonably be expected to already possess, or (f) is an undue administrative burden.”

6. Supplemental Bid Evaluation Criteria — Percentage Weighting

To provide additional clarity beyond RFP Section V, CEA will apply Policy CEA-07 (Non-Energy Procurement Policy) to award the contract to the proposer that demonstrates the “Best Value” to CEA. A “Best Value” is an award based on factors in addition to price that provide the best overall value to CEA. The following percentage weighting to the evaluation criteria listed in RFP Section V will be as follows:

Evaluation Criterion	Weight
Relevant experience and qualifications of the firm (including San Diego region / SDG&E experience)	25%
Proposed services and methodology	25%
Commercial terms / price	25%
Overall response to the RFP	15%
Schedule	10%

This section supplements, and does not replace, CEA's adopted Bid Evaluation Criteria Policy referenced in RFP Section V.