



REQUEST FOR PROPOSALS

RFP #2026-005

Qualified Firms for Data Manager and Customer Contact Center

Date of Issuance: August 10, 2026

[Addendum No 1. Issued: September 8, 2026](#)

SUBMITTALS DUE:

5:00 PM (PDT)

Friday, ~~September 25~~ October 2, 2026

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I. INTRODUCTION & BACKGROUND

Clean Energy Alliance (“CEA”) is seeking proposals from qualified organizations and business entities to provide Data Manager and Call Center Services (“Services”) to support CEA’s customer enrollment, billing, and call center activities. Responders must be able to show they are capable of performing the services requested. To qualify for consideration, respondents must have experience providing the services sought in this RFP within the State of California, either for Investor-Owned Utilities (IOUs), Publicly Owned Utilities (POUs), Electric Service Providers (ESPs), or Community Choice Aggregators (CCAs).

About CEA

In November 2019, the cities of Carlsbad, Del Mar and Solana Beach formed CEA, a non-profit public entity that operates a Community Choice Aggregation (CCA) program within their city limits, in the San Diego Gas & Electric (SDG&E) service territory. Since initial formation, the cities of Escondido, Oceanside, San Marcos and Vista have joined CEA, with over 255,000 customers currently being served by CEA.

CEA is an energy services provider benefiting the community through the delivery of cleaner and more locally produced electricity, demand reduction, economic investment, and competitive rates for residents, businesses, and municipal facilities in the service territory. As members of CEA, participating local governments pool the electricity demands of their communities to increase their purchasing power for higher renewable power content and investment in local energy infrastructure and energy efficiency programs. CEA is locally controlled and ratepayer supported, with no taxpayer subsidies.

By law, as a Joint Powers Authority (JPA), CEA is a separate legal entity from its member agencies, and its budget is separate from the general funds of these local governments. Board meetings are open to the public.

The service territory of CEA may expand in the future to include additional agencies.

II. SCOPE OF SERVICES

Overview of Services Requested

CEA is seeking comprehensive, professional proposals from qualified firms to provide the requested Services to support several broad categories: secure data management, billing administration, customer call center activities, analytics, and reporting. The successful respondent

will act as a core operational partner ensuring data continuity, revenue protection, and strategic technical support as CEA continues to manage and evolve its service footprint.

The anticipated duration of the agreement is thirty-six (36) months with a target commencement date of June 1, 2027. CEA reserves the right to contract for up to two (2) additional one-year extensions for these services. At the time of extension, CEA may renegotiate the scope of services and associated costs with the Contractor, which may include a reduction in scope of services and corresponding adjustments to costs. Respondents are encouraged to indicate if alternative or longer contract durations would yield cost efficiencies or preferential pricing for CEA.

Respondents must demonstrate robust capabilities and successful past performance across four primary domains:

- **Data Management and Data Exchange Services:** Managing all automated data exchanges, data clearinghouse activities, and complex transaction processing with San Diego Gas & Electric (SDG&E). This includes handling customer account enrollments, processing drop requests and ensuring the absolute integrity of billing meter data transfers.
- **Billing Administration:** Supporting sophisticated billing scenarios and accurate calculation and timely execution of CEA's rate structures against utility-provided usage data, including Net Energy Metering (NEM) tracking, specialized customer incentive programs, rate modeling, and automated data feeds to CEA's third-party printing and mailing vendors.
- **Customer Contact Center:** Operating a professional Customer Contact Center which reflects CEA'S commitment to its communities. The center must provide multi-lingual live-agent support, interactive self-service systems, high-quality script adherence, and robust case management tracking for telephone, web-portal, and electronic inquiries.
- **Data Governance, Analytics, and Reporting:** Providing an intuitive, secure Customer Information System (CIS) that serves as the single source of truth for eligible and enrolled accounts within CEA service territory. The system must support real-time user access for CEA staff, track comprehensive customer histories, and maintain strict compliance with CPUC customer privacy mandates. Contractor will deliver data visualization tools, self-service analytical portals, standardized operational reporting, and automated financial data transfers (such as aging summaries) to protect CEA's fiscal operations.

CEA expects a collaborative and engaged relationship wherein the Contractor is a key service provider responsible for handling the management and processing of data to ensure accurate and complete billing of CEA customers through the applicable IOU's billing framework, operating a Customer Contact Center to respond to customer calls and enrollment requests, as well as ensuring accurate settlement of CEA's load with the California Independent System Operator

(CAISO). The selected Contractor must commit to regular product roadmap engagement, proactive consultation before system modifications, and a flexible service framework that easily accommodates future program enhancements, load-serving entity obligations, and regulatory design adjustments.

1. Data Management and Data Exchange Services

- a. **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.](#)
- b. **Data Integrity & Error Resolution:** Establish robust validations to detect anomalies in utility data feeds.
- c. **Interval Data Management:** The platform must be capable of pulling, processing, and storing high-resolution interval data (e.g., 15-minute or hourly Smart Meter/AMI data) for all eligible accounts.
- d. **Settlement Quality Meter Data (SQMD) Services:** Aggregate and format data into SQMD compliant with CAISO standards and deadlines. The vendor will be expected to deliver validated SQMD directly to CEA's designated Scheduling Coordinator (SC) or securely submit it directly to CAISO on CEA's behalf.
- e. **Qualified Reporting Entity (QRE) & Western Renewable Energy Generation Information System (WREGIS) Services:** Act as a QRE for up to thirty (30) locally situated, small-scale renewable energy projects and distributed resources supplying energy to CEA through a feed-in tariff (FIT) or other mechanism. Contractor will be required to compile performance-tracking data for CEA and submit monthly generation extract file to WREGIS in compliance with its data requirements.
- f. **Data Continuity:** Ensure historical usage, interval data, and customer demographic data are archived and readily searchable for a rolling period of no less than five years, supporting regulatory compliance, dispute resolution, long-term trend analysis, and audit readiness.

Please provide an overview of how your solution and/or services meets the overview outlined above. Respondents should provide an overview of the technology Contractor proposes to use for processing, organizing, storing, and securing all data associated with Services requested. Respondents should describe the way files posted to the EDI server are managed, organized, validated, and secured, as well as internal exception-handling workflows and protocols for cooperatively resolving missing, corrupted, duplicated files. Please include your proposed solution for managing daily EDI exchanges with SDG&E, the platform's ability to ingest, validate, and store large-scale interval data across a growing account base, and your experience and methodology for aggregating and delivering compliant SQMD to CAISO or a third-party Scheduling Coordinator within strict market settlement windows as well as your experience acting as a QRE and submitting compliant monthly data extract files directly to WREGIS. Please also describe any ancillary and/or unique additional services you may offer beyond those described herein. 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.

2. Billing Administration and Revenue Assurance

- a. **Rate and Tariff Calculations:** Accurately calculate and apply all CEA rate schedules against utility usage data. This includes managing time-of-use (TOU) rates, NEM tracking, true-ups, and any specialized customer credits or incentives. Support rate changes intermittently throughout the year as CEA may introduce new service offerings, update rates when there is a change in the IOU unbundled generation rate, Power Charge Indifference Adjustment (PCIA), or Franchise Fee.
- b. **Billing Quality Control and Accuracy Standard:** Perform routine pre-billing audits to identify and correct account anomalies, extreme usage spikes, or incorrect rate assignments before data is sent to SDG&E for customer invoicing. Contractor shall maintain a billing accuracy rate of at least 99% on a monthly basis, measured as the percentage of customer bills issued without an error attributable to Contractor (rate application, usage data anomalies, calculation error). Contractor shall track and report this metric monthly as part of the standard reporting package (see Exhibit A).
- c. **Adjustments and Error Correction:** Track and resolve billing exceptions such as retroactive account changes or utility billing corrections, ensuring any disputes are resolved within two billing cycles.

- d. **Customer Notification Coordination:** Provide customer mailing list to CEA's designated printer to trigger timely customer notices (such as move-in letters, opt-out confirmations, late-payment reminders, Joint Rate Comparisons, etc.) in accordance with CEA policies.
- e. **Financial Tracking Integration:** Ensure the billing engine directly supports financial reporting needs, including the tracking of customer aging balances. Send accounts to CEA's collection agency per collections policy and provide statements as needed.

Please provide an overview of how your solution and/or services meets the overview outlined above. Responders should describe their proposed rate engine functionality, audit and quality control mechanisms, and time to implement changes. Provide timelines for resolving billing exceptions and errors as well as your billing accuracy and billing timeliness metrics. Describe your process for generating, validating, and providing customer lists for various communication notifications and how you minimize/mitigate undeliverable and returned mail, and how you prepare the Customer Contact Center for potential call volume increases related to notification activities, including coordination with external print and mailing fulfillment vendors to ensure strict adherence to regulatory notification timelines.

3. Customer Contact Center

- a. **Customer Inquiry Management:** Provide integrated customer support across voice, email, and web channels. Contractor will track all customer interactions under a unified account profile to ensure consistency across separate inquiries. Provide personnel to manage escalated calls.
- b. **Scalable Staffing and Performance Standards:** Maintain standard service levels (such as targeted average speed of answer and low call-abandonment rates) during normal operations as well as peak periods, including seasonal rate changes or mass enrollment cycles.
- c. **Minimum Performance Floor:** At minimum, Contractor's proposed SLAs must meet or exceed industry-standard practice for a CCA of comparable size, including, at a minimum: 85% or more of calls answered within 45 seconds during non-enrollment periods, call abandonment rate no greater than 5%, 95% of voicemails and web/portal inquiries acknowledged within one (1) business day, and 100% of emails receiving a substantive response within three (3) business days. Respondents are encouraged to propose more rigorous SLAs and should describe how proposed staffing and technology will support them.

- d. **Interactive Voice Response & Language Accessibility:** Provide professional, clear Interactive Voice Response (IVR) systems and customer self-service options. Contractor must provide multi-lingual live-agent support and reliable translation services for key regional languages, including Spanish, Tagalog, Cantonese, and Mandarin.
- e. **Quality Assurance and Monitoring:** Implement a continuous quality-monitoring program to evaluate agent courtesy, CCA script accuracy, first-contact resolution, and overall customer satisfaction. Maintain securing recordings of inbound calls for an agreed-upon historical period.
- f. **In-House Transition Readiness:** Contractor shall describe its training protocols and knowledge-transfer approach in the event CEA elects to transition contact center functions in-house or to another provider at a future date, including documentation standards, script/knowledge-based portability, and reasonable staff cross-training support.

Please provide an overview of how your solution and/or services meets the overview outlined above. Responders should describe their customer contact center solution, including software platforms used, case management tracking across multiple channels, and their approach to maintaining a single unified customer interaction history. Please detail staffing methodology and scalability strategies to meet target Service Level Agreements (SLAs) during standard operating periods as well as peak call-volume events (e.g., high-enrollment months or rate adjustments), and outline capabilities for providing multi-lingual support, language translation services, and user-friendly IVR self-service paths.

4. Data Governance, Analytics, and Reporting

- a. **Customer Information System (CIS) Access:** Provide a centralized, web-accessible database serving as CEA's single source of truth for account status, customer program enrollment, tariff elections, collection status, interaction histories, opt-out status, etc. The platform must feature secure role-based access for CEA personnel.
- b. **Standard Operational and Financial Reporting:** Deliver regular, automated data packages via secure transfer protocols or direct dashboard access. These reports must reliably support CEA's ongoing operational and financial tracking needs, including cash receipts, customer aging metrics, unbilled usage, invoice summary reports, etc. See Exhibit A for the minimum standard reporting package and delivery cadence.

- c. **Business Intelligence and Dashboards:** Provide user-friendly data visualization tools or a self-service analytical portal. This environment should allow CEA staff to run ad-hoc queries, evaluate program participation, and analyze rates across customer classes. Contractor should continuously maintain and update the functionality of the data warehouse environment and is expected to establish a structured feedback mechanism to actively solicit input from CEA regarding required functionalities, necessary data elements, and overall system design.
- d. **Security Compliance and Product Roadmap Alignment:** Maintaining strict customer privacy protocols in alignment with CPUC data privacy regulations. Contractor is expected to engage collaboratively with CEA to share product roadmaps and solicit input before making system or data structure updates.
- e. **Data Security Breach Notification:** Contractor shall maintain a Data Management Provider Security Breach Policy and shall notify CEA of any suspected or confirmed data security breach affecting CEA customer data no later than 72 hours after discovery, consistent with applicable law and CEA policy.

Please provide an overview of how your solution and/or services meets the overview outlined above. Responders should describe their secure Customer Information System (CIS) user interface, detailing how CEA staff will log in, navigate account histories, view correspondence archives, and input manual account notes, and the ability to add tracking metrics. Please also describe data visualization and self-service analytical tools, explaining how CEA staff can independently perform ad-hoc reporting, analyze load profiles, and track program enrollment trends. Outline system security framework, data backup procedures, breach notification protocols, and compliance protocols for protecting confidential customer data in accordance with CPUC rules.

5. Transition Services

- a. **Transition-In:** Contractor shall describe its proposed methodology, timeline, and staffing plan for transitioning approximately 255,000 active customer accounts, associated historical data, and in-flight billing/service transactions from CEA's incumbent contractor without service interruption or data loss. Contractor shall describe its approach to parallel testing, data validation/reconciliation against the incumbent's records, customer notification, and call center cutover, and shall identify anticipated risks and mitigation strategies.

- b. **Transition-Out:** Upon expiration or termination of the agreement, Contractor shall cooperate in good faith with CEA and any successor contractor to transition Services, including providing complete, accurate, and usable exports of all customer, billing, and historical usage data in a mutually agreed format, within a mutually agreed timeframe, at no additional cost to CEA beyond reasonable, pre-disclosed labor costs.

6. Additional Considerations

- a. **Community Benefit:** CEA's mission is to empower local communities with the choice of sustainable and affordable energy for all customers, accelerating the transition to clean energy and fostering local economic growth, environmental responsibility, sustainability and community well-being.
- b. **Confidentiality and Use of Artificial Intelligence (AI).** Keeping our customer information confidential and complying with legal requirements related to confidentiality and data security is essential. Open source AI is becoming commonplace and embedded inexorably in many software solutions, which is contrary to confidentiality requirements.

Please provide an overview of additional benefits, if any, that your organization has or plans to take that are in alignment with CEA's efforts directed toward the communities within CEA's service territory to create a sustainable future or that can help CEA achieve its mission, to the extent not covered elsewhere. Please provide an overview of your organization's data privacy and security policies, including with respect to the use of AI.

Exhibit A: Standard Reporting Package (Minimum Baseline)

The following reflects the minimum standard reporting package carried forward from CEA's prior agreement. Contractor's response should confirm ability to meet this baseline and may propose additional or enhanced reporting (e.g., self-service dashboard access in lieu of static file delivery) as described in Section 4.

Report	Frequency	Delivery Method
Aging	Weekly, Monthly	SFTP
Call Center Stats	Weekly, Monthly	Email

Cash Receipts	Weekly, Monthly	SFTP
City Invoice Summary Reports	Monthly	SFTP
Customer Complaints	Monthly	SFTP
Days To Invoice	Weekly, Monthly	SFTP
Overdue Usage	Weekly, Monthly	SFTP
Performance Standards	Monthly	SFTP
Billing Accuracy	Monthly	SFTP
Program Opt Up with Address	Weekly, Monthly	SFTP
Utility User Tax (UUT) where applicable	Monthly	Email
Invoice Summary Report	Weekly, Monthly	SFTP
Invoice Summary Report – Mid Month	Monthly	SFTP
Monthly Transaction Summary	Monthly	Email
Opt Out with Rate Class	Weekly, Monthly	SFTP
Retroactive Returns	Monthly	Email
Sent to Collections	Monthly	Email
Snapshot	Weekly	SFTP
Snapshot with Addresses	Weekly	SFTP
Unbilled Usage	Monthly	SFTP
Full Volume Usage by Rate Class	Monthly	SFTP
Interval/AMI Data Extract	Weekly, Monthly	SFTP

III. QUESTIONS

Questions are to be submitted via email to: Programs@TheCleanEnergyAlliance.org by 5:00 PM PDT, August 31, 2026. Responses will be provided via email by September 8¹⁴, 2026, and posted to CEA’s website on the Solicitations page.

[CEA reserves the right to decline to respond to any questions 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.

IV. PROPOSAL REQUIREMENTS

Submittals should be concise, well-organized, and demonstrate the qualifications, experience and approach necessary to meet the scope of services. All proposals must provide a comprehensive description of the Proposer's qualifications and capabilities applicable to the scope of required services. Submittals shall include the following items in the order listed:

Cover Letter: Cover letter (maximum two pages) should provide a short synopsis of the proposer's approach to completing the tasks and delivering the required scope of services as well as describe how the delivery of services will be provided. Cover letter to include:

- RFP Number and title
- Name and address of proposing firms and/or individuals
- Identification of lead proposer, if team approach is proposed
- Name of primary contact person
- Contact information (phone and email address) of primary contact person

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Scope of Work: Please refer to the Scope of Work section for detailed requirements. Bidders are encouraged to propose enhancements or procedural or technical innovations to the Scope of Required Services that do not materially deviate from the objectives or content of services included in this RFP.

Bidder(s) shall:

- Provide a narrative, which addresses the Scope of Required Services, and shows understanding of the needs and requirements of CEA.
- Describe the approach to completing the tasks specified in the Scope of Required Services. The work plan shall be of such detail to demonstrate the bidder's ability to accomplish the project objectives.
- Outline activities that would be undertaken in completing the tasks and specify who would perform them and what the associated costs would be.

- Furnish a project schedule for completing the tasks in terms of elapsed weeks from the project commencement date.
- Identify any special issues, problems or risks that are likely to be encountered in this project and how the bidder(s) would propose to address them.

General qualifications, key personnel & sub-consultants: Submit a general description of your firm's qualifications to complete the Scope of Required Services, along with the qualifications and specific roles of any sub-consultants to be employed on this project. Summary of qualifications should speak to relevant experience with providing the scope of required services. Include the names and qualifications of the key individuals who will be responsible for delivering these services, their respective roles, and the organizational structure of the team. If the firm has multiple offices, the office of record for each team member shall be listed, as well as the primary office location where the work is to be performed.

Experience: Provide summaries of three completed (or currently on-going) service contracts that are similar in scope to the type of services required by CEA. The summaries should include client name, contact information, scope of service, team members, date completed and total (or annual) cost of services. Please specify any experience in the San Diego region including experience working on behalf of public agencies with San Diego Gas and Electric (SDG&E).

Proposed Approach: Describe your firm's proposed approach to the scope of required service. Identify the methods to be used in the completion of and/or carrying out the scope of required services. Proposers can include other services deemed relevant to the successful implementation of a CCA program.

Company overview: Provide the following for the company (or companies if team approach is proposed):

- Official registered name, address, main telephone number.
- Primary contact name, title, address (if different from above), direct telephone number.
- Brief history, including year established, relevant financial information, and relevant CCA implementation and operational experience.
- The proposer must provide the following: (1) financial statements from the prior two years of operations; (2) credit rating from two of the following: Standard & Poors, Moody's, or Fitch Investor Services from the most recent rating agency report.

Schedule: Include a detailed schedule for providing the required services, listing milestones and estimated completion dates for each of the tasks. Provide a statement of time commitment by the firm to this scope, justifying the firm's ability to complete the scope of required services and support a **June 1, 2027** start date.

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.

V. SELECTION

Submittals will be reviewed and ranked based on CEA's adopted Bid Evaluation Criteria Policy (attached) and additional criteria listed below. CEA reserves the right to request additional information or clarification from firms responding to this RFP. All submittals deemed responsive will be evaluated using the Bid Evaluation Criteria as well as the following (listed in no particular order of importance or value of rating):

- Best value
- Relevant experience and qualifications of the firm (including experience working in the San Diego region and specifically with SDG&E)
- Schedule
- Overall response to the RFP
- Proposed services and methodology

Selection will be made based upon the firm’s current ability to provide the highest quality service that meets the requirements and objectives of this RFP, the needs of CEA, and provides the best value to CEA at a fair and reasonable fee.

Upon ranking of the submittals based on a review of the selection criteria, the process may include a video conference or teleconference interview with CEA staff. CEA expects to expeditiously finalize the PSA terms and present the agreement to the CEA Board at its ~~January 28~~March 25, 2027 Board meeting.

VI. CONDITIONS GOVERNING THIS PROCUREMENT

SCHEDULE

This section of the RFP provides the anticipated schedule for the solicitation and describes the events and the conditions governing the procurement. CEA will make every effort to adhere to the anticipated schedule below:

Issue RFP	August 10, 2026
Deadline for written questions to be submitted (email)	August 31, 2026, at 5:00 PM PDT
Responses to written questions (email)	September ~~8~~ <u>14</u> , 2026
Submittal due date	~~September 25~~ <u>October 2</u> , 2026, at 5:00 PM PDT
Evaluation of Proposals (oral interviews if needed)	~~September 28~~ <u>October 5</u> , 2026 – October ~~23~~ <u>30</u> , 2026
Final Selection	~~October 30~~ <u>November 6</u> , 2026
Contract to Board for Selection	March 25, 2027
Expected Commencement of Work	June 1, 2027

General Covenants

Rights of CEA

This RFP does not commit CEA to award a contract for any costs incurred in the preparation of the submittal. CEA reserves the right to accept or reject any or all submittals, or any part of a submittal received as a result of this request, to waive minor defects or technicalities, to award multiple contracts, or to solicit new submittals for the same scope of work or a modified scope of work, or to extend, expand, or cancel in part, or its entirety, this RFP if it is in the best interest of CEA to do so. CEA will not reimburse any of the proposers for their costs to prepare and submit a proposal.

Claims against CEA/Conflicts of Interest

Neither your organization nor any of your representatives shall have any claims whatsoever against CEA, or any of its respective officials, agents, or employees, except as set forth in the terms of a definitive agreement between CEA and your organization at the time the proposal is submitted. Neither your organization nor any of your representatives shall have any relationship with CEA or any of its respective officials, agents, or employees such that entry into the agreement for the services solicited in this RFP would present a conflict of interest or otherwise violate any legal or ethical obligation of CEA or any of its respective officials, agents, or employees. Any facts relevant to an analysis of potential conflicts of interest must be disclosed in the proposal.

Form of Proposals

Electronic proposals only will be accepted.

Amended Proposal

Proposers may submit amended proposals before the Deadline to Submit Proposals. Such amended proposals must be complete replacements for previously submitted proposals and must be clearly identified in a written format. CEA will not merge, collate, or assemble proposal materials.

Withdrawal of Proposal

Proposers may withdraw their proposals at any time prior to the Deadline to Submit Proposals. The proposer must submit a written withdrawal request signed by the proposer's duly authorized representative addressed to and submitted to the Contact.

Late Responses

To be considered, proposals must be received via email by ~~September 25~~October 2, 2026, 5:00 PM PDT. No late responses will be considered.

No Public Proposal Opening

There will be no public opening for this RFP.

Public Records Act

Please note that any information provided as part of a submittal in response to the RFP may be subject to the Public Records Act (PRA). If the Proposer feels that any part of its submission is proprietary information, please identify by section, paragraph, and page the information the Proposer believes is proprietary. In the event of a PRA, this information may be reviewed by CEA's attorneys for applicability. No guarantee can be provided that any part of the Proposer's information will be kept confidential.

Confidentiality

All data and information obtained from or on behalf of CEA by the Proposer and its agents in this RFP process, including reports, recommendations, specifications, and data, shall be treated by the Proposer and its agents as confidential. The Proposer and its agents shall not disclose or communicate this information to a third party or use it in advertising, publicity, propaganda, or in another job or jobs, unless written consent is obtained from CEA. Generally, each proposal and all documentation, including financial information, submitted by a Proposer to CEA is confidential until a contract is awarded, when such documents become public record under State and local law, unless exempted under the PRA.

VII. SUBMITTAL & REVIEW

Firms must submit required materials no later than 5:00 PM PDT on ~~September 25~~October 2, 2026, via email to Programs@TheCleanEnergyAlliance.org. Please title the email in the subject field as "CEA RFP Data Manager and Customer Contact Center". Submittals received after the specified time will not be considered.

For additional information, please contact Kaitlin McGee, Senior Key Accounts/Program Manager, Clean Energy Alliance by email to Programs@TheCleanEnergyAlliance.org.

VIII. ANTI-DISCRIMINATION AND SUSTAINABLE WORKFORCE POLICY

CEA does not, and will not discriminate, and requires in its contracts with suppliers that they will not discriminate, on the basis of race, color, national origin, ancestry, age, disability (physical or mental), sex, sexual orientation, gender identity, marital or domestic partner status, religion, political beliefs or affiliation, familial or parental status (including pregnancy), medical condition (cancer-related), military service, or genetic information.

CEA strives to support local jobs, sustainable and inclusive workforce opportunities, local economic sustainability, and diversity through contracting for its power sources (see [CEA's Anti-Discrimination and Sustainable Workforce Policy](#)) in a manner that is consistent with anti-discrimination laws. CEA encourages respondents to submit information regarding planned efforts by respondent and respondent's contractors to:

- Employ workers and businesses from the local area of the proposed project(s).
- Employ properly licensed contractors and CA Certified electricians.
- Utilize local apprentices, particularly graduates of San Diego County pre-apprenticeship programs.
- Pay workers prevailing wage for each craft, classification and type of work performed.
- Provide workers compensation coverage to on-site workers.
- Support and use State of California approved apprenticeship programs.

Pursuant to California Senate Bill 255 (Public Utilities Code Section 366.2(m)(2)), CCAs are required to report to the California Public Utilities Commission ("CPUC") on their diverse suppliers, as defined by CPUC General Order 156. Consistent with the California Public Utilities Code and California Public Utilities Commission policy objectives, respondents are encouraged to complete a Supplier Diversity questionnaire with their submission (linked in the Response Form), and respondents that execute an agreement with CEA will be asked to complete the aforementioned questionnaire and provide any other information that CEA needs to comply with its reporting requirements set forth in Public Utilities Code Section 366.2(m)(2) or other applicable law.

CEA encourages all eligible parties to get a Supplier Clearinghouse Certification with the CPUC. For overview information on the CPUC Supplier Diversity Program, please visit the program homepage (<https://www.cpuc.ca.gov/supplierdiversity/>). For information on the certification process and requirements, please visit the CPUC's Certifications page (<https://www.cpuc.ca.gov/about-cpuc/divisions/news-and-public-information-office/business-and-community-outreach/supplier-diversity-program/certification>).

Thank you for your interest. We look forward to reviewing your submittal.