



**REQUEST FOR PROPOSAL  
RFP # 2021-001**

**Qualified Firms for  
Behind-the-Meter Distributed Energy Program**

**Date of Issuance: September 1, 2021**

**SUBMITTALS DUE:**


**5:00 PM (PST)  
Monday, October 1, 2021**

**CONTACT: BARBARA BOSWELL  
INTERIM CHIEF EXECUTIVE OFFICER  
[CEO@TheCleanEnergyAlliance.org](mailto:CEO@TheCleanEnergyAlliance.org)**

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## **I. INTRODUCTION & BACKGROUND**

Clean Energy Alliance (“CEA”) is seeking proposals for qualified organizations and business entities to implement programmatic deployment of safe and affordable battery energy storage systems (BESS) to CEA customers. The goal is to increase local resiliency and reliability, protect vulnerable customers and critical facilities, enhance CEA’s peak load management strategies, support CEA’s decarbonization strategies, and support statewide efforts to improve overall grid health. In partnership with the program implementer(s) selected through this solicitation, CEA intends to offer innovative, valuable, and affordable energy storage programming options that offer significant incentives to priority market segments and enhanced resiliency and reliability to eligible customers, while also providing meaningful new opportunities for procurement cost savings and enhanced risk management capabilities through strategic load-shaping and active peak load management strategies.

CEA desires qualified partners capable of providing end-to-end project development and installation services necessary to implement an innovative, programmatic approach to increasing local resilience and reliability and supporting active peak load management through the deployment of behind-the-meter (BTM) dispatchable BESS within CEA’s service territory, with no upfront costs to CEA or participating customers.

### **About CEA**

In October 2019, the cities of Carlsbad, Del Mar and Solana Beach formed CEA, a non-profit public entity that operates a Community Choice Energy (CCE) program within their city limits, in the San Diego Gas & Electric (SDG&E) service territory. CEA’s purpose is to be an energy services provider, which benefits 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.

CEA’s program allows participating local governments to pool the electricity demands of their communities in order to increase their purchasing power for higher renewable power content and invest in local energy infrastructure and energy efficiency programs. CEA is locally controlled and ratepayer supported, with no taxpayer subsidies.

CEA’s Board of Directors approved its CCA Implementation Plan and Statement of Intent in December 2019, which was subsequently submitted to the California Public Utilities Commission (CPUC) for certification, as part of the process to launch a CCA program in May 2021.

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

The service territory of CEA may expand in the future to include additional counties and cities.

## **II. PROJECT SCOPE**

CEA intends to deploy BESS strategically to increase local resiliency and to provide new tools and capabilities that support its ongoing efforts to provide affordable portfolio of clean energy options to the communities and customers we serve. CEA is seeking industry partners to provide the implementation of

an innovative, safe, and accessible battery energy storage program that provides meaningful benefits to its customers, while also supporting CEA's day-to-day operations, decarbonization strategies, enhancing local resiliency and overall grid health.

### **Project Goals**

- Provide significant financial incentives for customers with no upfront out-of-pocket costs and simple and affordable repayment options to repay any balance after all incentives are received.
- Provide a streamlined and accessible process for eligible customers to receive a valuable and affordable BESS that provides cost savings through demand management, backup power (enhanced reliability and resiliency) during planned grid outages, and any other values that the selected program partners are able to offer.
- Develop fleet of local distributed energy resources (DERs) that CEA can monitor and dispatch to support its overall portfolio and procurement needs, peak load management and demand response strategies, and ongoing financial well-being as an organization.

### **Market Segments**

The focus for CEA's energy storage program offering will be delivering dispatchable BESS to 1) Large Commercial and Industrial customers, 2) Local government agencies providing critical resiliency and/or emergency services throughout its service territory, 3) Small and Medium Commercial customers, and 4) Net Energy Metering (NEM) customers in these segments. A secondary focus will be offering energy storage programming for Residential customers with an emphasis on the disadvantaged community.

## **III. QUESTIONS**

Questions are to be submitted to Barbara Boswell, Interim CEO, via email to: [CEO@TheCleanEnergyAlliance.org](mailto:CEO@TheCleanEnergyAlliance.org), by 5:00 PM PST, September 21, 2021. Responses will be provided via email by September 24, 2021 and posted to CEA's website on the Solicitations page.

## **IV. PROPOSAL REQUIREMENTS**

Submittals should be concise, well-organized and demonstrate the qualifications, experience and approach necessary to meet the project goals. Submittals shall include the following items in the order listed:

1. The background on your firm and identification (including resumes) of the personnel to be involved in the project.
2. A list of all energy companies (e.g., other community choice aggregation programs or municipal electric companies) that you have provided services for within the past five (5) years.
3. A list of all Subcontractors and/or Suppliers that your company has used to support energy storage projects over the past three (3) years; include contact information and products/services provided.

4. Provide information on any relevant energy storage projects/programs that are representative of your company's capabilities to support CEA's Distributed Energy Program; include project name, description, project owner, prime contractor and /or project partners.
5. Provide a detailed description of the proposed approach to implementing the program (Project Scope). As a reminder, CEA is seeking qualified industry partners to support the cost-effective deployment of an innovative behind-the-meter battery energy storage program that provides eligible customers with an affordable, zero upfront cost opportunity to add battery energy storage to their existing or planned NEM solar systems to provide backup power during grid outages, load flexibility and demand response capability. Project approach should include:
  - Estimated Costs – Describe estimated total cost per customer and/or per unit of battery energy storage deployed and include anticipated annual savings per customer.
  - Customer Offering – Provide details on what participating customers will receive and what they will be required to do to move through the process to a successful outcome. For example, information on technical assistance provided, assessment report, recommended equipment, financing, and contracting mechanism. Please indicate if proposal applies to new solar photovoltaic (pv) installations only, or if program will include existing solar net energy metering customers. Please indicate commercial offering and residential offering if included.
  - Customer Outreach/Recruitment – Describe plan for recruiting program participants and anything needed from CEA to implement customer engagement plan.
  - Financing – Provide a summary of proposed approach to financing project installations, including high-level proforma outlining itemized cashflow on a per project basis. Include details on all anticipated incentives (such as ITC and/or SGIP), and any contingency plans and projected impacts if those incentives are not received.
  - Proforma – Provide total cost structure per installed system for three (3) standardized BESS, assuming 4-hour discharge configuration (i.e., 20 kWh, 200 kWh, 500 kWh). Provide all assumptions, including cost of capital (interest rates), equipment costs, labor costs, permitting and interconnection costs, expected incentives, remaining costs after all incentives, and customer payments needed to payoff remaining costs, if any. Please include breakdown of pricing and PPA cost assumptions, and include a sample cash flow.
  - Project Timeline – Provide estimated timeline with tasks, milestones and/or phases for development to implementation/launch of program.
  - Fees – CEA is looking to implement a no-upfront-cost program for both its customers and CEA; please detail any fees or costs that your firm will charge, and proposed method of compensation. For example, would there be an administrative fee to get the program developed, and are there any ongoing fees to maintain the program during project term? If so, provide options for payment of these fees.
  - Scalability – Provide estimate of annual customer enrollment (based on any past experience) and describe any key factors that would enable scale in subsequent years, including key risks and challenges anticipated in meeting these targets. Please indicate if there is a minimum total amount required for your program to be feasible – either based on customer account or MW installed – and explain if there is a phased approach to reach certain target numbers over a specific time period.

- Data Needs – Provide a table with headings indicating data you will need from CEA to implement proposed approach and include expected timeline for receiving such requests.
  - Measurement and Verification – Include a plan for facilitating measurement and verification of installed BESS performance over the useful life of the installed equipment. Plan should provide reliable information on the performance of the assets to support asset management, reporting, settlement processes, etc.
  - Asset Maintenance, Warrantees, and Performance Guarantees – Include a plan for providing asset maintenance to participating customers for the life of the installed BESS, including any planned asset services or replacements. Provide summary of any/all applicable warranties and/or performance guarantees.
6. Provide a detailed process for customer acquisition and developing, permitting, and installing behind-the-meter BESS.
  7. Highlight any innovations, special processes or technologies, competitive advantages, and value-added services that will enhance program delivery and/or customer participation. This should include a detailed description of embedded metering, telemetry, and communication standards and protocols. Include Resource Adequacy Values and/or Ancillary Market participation values or any other innovative technologies or strategies that might create additional value.
  8. Proposal should include critical path issues and risk factors that could negatively impact implementation of the proposed approach, and any viable mitigation measures for managing such risks.
  9. Acknowledgement that the attached draft Professional Services Agreement (PSA), including insurance requirements is acceptable, or propose revisions to the PSA. The successful vendor will enter into a PSA with CEA. As this program is intended to be a “white label” program offered to CEA’s customers, CEA will offer a power purchase/subscription agreement with its program participants. Please provide a sample of a proposed customer agreement.
  10. A list of references, including name, company, telephone number, and email address. This list should state how long the Contractor has provided services to the reference and a brief summary of the scope of services provided. Please also include a contact for an entity that is no longer engaged by the Contractor.

## **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
- Schedule
- Overall response to the RFP
- Demonstrated ability to meet Project Goals

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 provide the best value to CEA.

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 October 28, 2021 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 .....	September 1, 2021
Deadline for written questions to be submitted (email)...	September 21, 2021, 5:00 PM PST
Responses to written questions (email).....	September 24, 2021
Submittal due date .....	October 1, 2021, 5:00 PM PST
Evaluate Proposals (oral interviews if needed) .....	October 2 – 20, 2021
Results to Board for Selection .....	October 28, 2021

**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*

Neither your organization nor any of your representatives shall have any claims whatsoever against CEA, or any of its respective officials, agents, or employees arising out of or relating to this RFP or these RFP procedures, except as set forth in the terms of a definitive agreement between CEA and your organization.

*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 October 1, 2021, 5:00 PM PST. 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 PRA.

## **VII. SUBMITTAL & REVIEW**

Firms must submit required materials no later than 5:00 PM PST on October 1, 2021, via email to [CEO@TheCleanEnergyAlliance.org](mailto:CEO@TheCleanEnergyAlliance.org). Please title the email in the subject field as "CEA RFP #2021-001 BTM Distributed Energy Program". Submittals received after the specified time will not be considered and will be returned to the responding firm.

For additional information, please contact Barbara Boswell, Interim Chief Executive Officer, Clean Energy Alliance by email to [CEO@TheCleanEnergyAlliance.org](mailto:CEO@TheCleanEnergyAlliance.org).

## **VIII. INCLUSIVE AND SUSTAINABLE WORKFORCE POLICY**

CEA desires to support local jobs, sustainable and inclusive workforce opportunities and local economic sustainability and diversity. CEA encourages respondents to submit information related to achieving the following goals:

- Employ workers and use businesses from the San Diego County area.
- Employ properly licensed contractors and California Certified electricians.



- Utilize local apprentices, particularly graduates of San Diego County pre-apprenticeship programs.
- Pay workers prevailing wages 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.

Relevant information submitted by respondents will be used to evaluate potential impact on local jobs and workforce of the project.

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