



REQUEST FOR PROPOSALS

Qualified Firms for Energy Portfolio Management and Valuation Services Platform

Date of Issuance:

February 11, 2025

SUBMITTALS DUE:

5:00 PM (PDT)

March 6, 2025

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I. INTRODUCTION & BACKGROUND

Clean Energy Alliance (“CEA”) is seeking proposals for qualified organizations and business entities to provide Professional Services for an Energy Portfolio Management and Valuation Platform (the “Platform”) for CEA. CEA is planning to deploy this Platform to help CEA procure power supply and manage its power portfolio, as well as support for financial and budget processes. CEA expects the Platform to be a software-as-a-service (“SAAS”) offering which CEA staff can be trained on and eventually operate directly. The range of functions may include position tracking and management, short- and long-term deal valuation, reporting, risk analysis including counterparty risk management, budget integration, and deal capture / trade entry. The Platform should be able to handle the full range of power products including, but not limited to, Power Purchase Agreements, Energy Storage Service Agreements, Resource Adequacy Agreements, Renewable Portfolio Standard Attribute Agreements, and hedging contracts under an Edison Electric Institute or Western Systems Power Pool (WSPP) master agreement including Inter-Scheduling Coordinator Trades.

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 240,000 customers currently being served by CEA.

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. By being members of CEA, participating local governments 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.

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.

II. SCOPE OF SERVICES

CEA intends to deploy its Energy Portfolio Management and Valuation Platform to provide the services described below (the “Services”) under a Professional Services Agreement. Notwithstanding the inclusion of such Services below, the final scope of Services negotiated between CEA and the successful Proposer shall be set forth in a Professional Services Agreement executed between CEA and the successful Proposer. CEA is seeking a vendor to complete the full implementation of the systems by July 1, 2025. CEA expects the minimum term of the services would be three years, with the option for longer engagements and/or extensions.

Anticipated Scope Items

- Portfolio position tracking and management, including Slice-of-Day Resource Adequacy positions
- Market pricing data, including integration with third-party data vendors (energy market data should be priced as a separate add-on scope item; CEA may in the future explore options for procuring additional or alternative third-party energy market data separately)
- Short- and long-term deal valuation and analysis of impacts on energy supply portfolio (ideally including nodal level project valuation capabilities)
- Risk analysis and reporting, including counterparty risk management
- Pro-forma budget integration and related financial analyses
- Deal capture / trade entry
- Ad-hoc support for specific technical tasks (outside of technical support included under the base offering – ad hoc support may include, for example, Proposer staff hours for valuation analysis of specific unique non-standard Power Purchase Agreement or Energy Storage Services Agreement offers received by CEA)
- *Proposers may offer additional services, to the extent they foresee these services being useful to CEA, inclusive with the base annual fee or priced as optional add-on scope items*

III. QUESTIONS

Questions are to be submitted via email to: RFPResponse@thecleanenergyalliance.org, by 5:00 PM PDT, February 18, 2025. Responses will be posted to CEA’s website on the Solicitations page by February 21, 2025.

IV. PROPOSAL REQUIREMENTS

Submittals should be concise (5-10 pages, excluding resumes), 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. Background on your firm and identification (including brief resumes) of key personnel
2. A list of three (3) clients (e.g., other community choice aggregation programs or municipal electric companies) that you have provided services for in the past three (3) years under scopes that are representative of your company's capabilities to support the Services in this RFP. Include reference contact information for each of the three clients.
3. Provide a detailed description of the proposed approach to implementing the Scope of Services, including approach for training CEA staff on use of the Platform and related documentation
4. Proposed annual budget, including:
 - Base scope pricing
 - Energy market data add-on pricing
 - Pricing structure for ad-hoc hourly support
5. Proposer's approach to technology support and cybersecurity, as described via responses to the questions listed in Attachment A
6. 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.
7. Acknowledgement that the attached draft [Professional Services Agreement](#), including insurance requirements, is acceptable, or proposed revisions to the Agreement in redline format. Revisions not requested in the proposal will not be considered. CEA reserves the right to find any proposal non-responsive if revisions are requested to the Agreement.

V. SELECTION

Submittals will be reviewed and considered based on the criteria listed below (listed in no particular order of importance or value of rating). CEA reserves the right to request additional information or clarification from firms responding to this RFP. All submittals deemed responsive will be evaluated.

- Best value
- Relevant experience and qualifications
- Reasonableness of budget and schedule
- Overall approach and response to the RFP

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 Professional Service Agreement terms and present the agreement(s) to the CEA Board at its March 27, 2025 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	February 11, 2025
Deadline for written questions to be submitted (email)....	February 18, 2025, 5:00 PM PDT
Responses to written questions (posted to website).....	February 21, 2025,
Submittal due date	March 6, 2025, 5:00 PM PDT
Results to Board for Selection	March 27, 2025

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 5:00 PM PDT, March 6, 2025. 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 PDT on March 6, 2025 via email to RFPRResponse@thecleanenergyalliance.org. Please title the email in the subject field as “CEA RFP Energy Portfolio Management and Valuation Services Platform”. Submittals received after the specified time will not be considered and will be returned to the responding firm.

For additional information, please contact RFPRResponse@thecleanenergyalliance.org.

VIII. INCLUSIVE AND SUSTAINABLE WORKFORCE POLICY

Visit our website at: <https://thecleanenergyalliance.org/key-documents/> for CEA’s Inclusive and Sustainable Workforce Policy.

CEA desires to support local jobs, sustainable and inclusive workforce opportunities and local economic sustainability and diversity. CEA encourages Proposers 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 Proposers will be used to evaluate potential impact on local jobs and workforce.

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

Attachment A – Technical and Cybersecurity Requirements

Please respond with appropriate detail to each section below. Please be as concise as possible and provide architectural diagrams to support your proposed solution.

1. **Data access and security:** What measures does the proposer have in place to ensure that the Platform has robust security to protect sensitive data from unauthorized access, theft, or loss?
2. **Cybersecurity:** Provide details on the cybersecurity features, including but not limited to, encryption, multi-factor authentication, and intrusion detection and prevention systems.
3. **Compliance:** Which relevant industry regulations and/or standards (HIPAA, GDPR, or PCI DSS) are utilized for the Platform?
4. **Integration:** Does the Platform have any integration capabilities with existing (or future planned) systems and infrastructure?
5. **Support and maintenance:** Provide standard support and maintenance policies, including response times, escalation procedures, and sample service level agreements.
6. **Scalability:** Discuss Proposers experience with scaling user/licenses. Additionally, provide information on any standard modules, outside of any included in the proposal, that clients typically look to add as their needs scale.
7. **Cloud capabilities:** Provide details on current or future cloud capabilities and integration that your product offers.