



REQUEST FOR PROPOSAL

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

Date of Issuance: March 17, 2025

SUBMITTALS DUE:

5:00 PM (PST)

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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 a safe and affordable Commercial Solar Generation and Battery Storage program, including battery only systems in CEA’s Service Territory. The goal is to increase local resiliency and reliability, provide local clean energy generation, 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- selected through this solicitation, CEA intends to offer an innovative, valuable, and affordable solar generation and energy storage program that offers cost savings and enhanced risk management capabilities through local behind the meter solar generation 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 options to CEA or participating customers. Through this solicitation, CEA encourages other financial structures and options.

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 250,000 customers currently being served by CEA.

CEA’s purpose is to be an energy services provider benefitting 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 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. PROJECT SCOPE

CEA intends to deploy Behind The Meter (BTM) Solar plus Storage assets or Storage assets in its ongoing efforts to provide an 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, scalable and equitable solar and energy storage program that provides meaningful benefits to its customers, while also supporting CEA’s day-to-day operations, decarbonization strategies, enhancing local generation and overall grid health.

Project Goals

- Provide significant financial incentives for customers to deploy BTM solar generation and energy storage with no upfront out-of-pocket costs.
- Provide significant financial incentives for customers to deploy BTM energy storage for commercial customers, including municipal customers with existing solar generation, including no upfront out-of-pocket cost options.
- Provide a streamlined and accessible process for eligible customers to host solar generation and energy storage that provides cost savings through local generation, peak demand reduction, and any other values that the selected program partners are able to offer.
- Develop a portfolio of BTM energy assets that CEA can monitor and dispatch to support its resource adequacy, 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 BTM solar generation and energy storage offering will be delivering dispatchable BESS to 1) Large Commercial and Industrial customers, 2) Municipal Facilities, 3) Small and Medium Commercial customers and, 4) Agricultural industry customers. Program structure or approach may be different for different market segments.

III. QUESTIONS

Questions are to be submitted via email to: Programs@TheCleanEnergyAlliance.org, by 5:00 PM PDT, March 27, 2025. Responses will be provided via email by April 7, 2025, and posted to CEA's website on the Solicitations page.

IV. PROPOSAL REQUIREMENTS

Submittals should be concise, no more than twenty (20) pages, 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 three (3) references, including name, company, direct telephone number, and email address. This list should state how long you have provided services to the reference and a brief summary of the scope of services provided.
4. 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.

5. Provide information on any relevant energy storage projects/programs that are representative of your company's capabilities to support CEA's Commercial BTM Distributed Energy Program; include project name, description, project owner, prime contractor and /or project partners.
6. 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 solar plus battery energy storage and battery only storage program that provides eligible customers with an affordable, zero upfront cost opportunity to add local clean energy generation, demand response capability, time of use optimization, peak demand reduction, and potential Virtual Power Plant (VPP) participation. Project approach should include:
 - Estimated Costs – Describe estimated total cost per customer and/or per unit of solar plus 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.
 - 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 in a separate excel file, with assumptions clearly outlined and formulas (rather than hardcoded values), where applicable. Include total cost structure per installed system for three (3) standardized solar plus battery storage assuming 24-hour discharge configuration (i.e., 100 kW, 250kW, 500 kW). 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 program with no up front cost options 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 BTM solar plus battery system 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, Warranties, and Performance Guarantees – Include a plan for providing asset maintenance to participating customers for the life of the installed systems including any planned asset services or replacements. Provide summary of any/all applicable warranties and/or performance guarantees.
7. Highlight any innovations, special processes or technologies, competitive advantages, and value-added services that will enhance program delivery and/or customer participation. Include Resource Adequacy Values and/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. Revisions not requested at the time of submittal will not be considered. Failure to accept the terms of the PSA may be grounds for CEA to determine that the proposal is non-responsive. The successful vendor will enter into a PSA with CEA. This program is intended to be a “white label” program offered to CEA’s customers. Please provide a sample of any proposed customer agreements required for participation.

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 May 29, 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.....	March 17, 2025
Deadline for written questions to be submitted (email).....	March 27, 2025, 5:00 PM PST
Responses to written questions (email)	April 7, 2025
Submittal due date	April 14, 2025, 5:00 PM PST
Evaluate Proposals (oral interviews if needed).....	April 14 – May 9, 2025
Results to Board for Selection	May 29, 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 April 14, 2025, 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 April 14, 2025, via email to Programs@TheCleanEnergyAlliance.org. Please title the email in the subject field as "CEA RFP Commercial BTM DEP". Submittals received after the specified time will not be considered.

For additional information, please contact Rob Howard, Key Accounts/Program Manager, Clean Energy Alliance by email to Programs@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.