



REQUEST FOR PROPOSALS (RFP #2026-005)

Qualified Firms for Data Manager and Customer Contact Center Responses to Respondent Questions

Questions received from Proposers during the solicitation period are reproduced below, organized by topic, together with CEA's responses. Questions are numbered sequentially and are not attributed to any individual Proposer.

RFP Timeline

Question 1: *Section V states that CEA expects to present the agreement to the Board at its January 28, 2027 meeting, while the procurement schedule in Section VI states "Contract to Board for Selection - March 25, 2027." Which date governs? The two dates imply materially different transition windows ahead of the June 1, 2027 commencement date, and the answer affects the transition methodology and staffing plan proposers can responsibly commit to.*

Response: March 25, 2027 is the correct date, as reflected in the Section VI Schedule. The reference to January 28, 2027 in Section V was in error and is hereby corrected. CEA intends to use the period between the Notice of Intent to Award/Selection (per Amendment No. 1, now targeted November 6, 2026) and the March 25, 2027 Board meeting to conduct negotiations with the selected Proposer on scope, price, term, and other definitive agreement terms in advance of formal Board consideration and approval.

Procurement Timeline & Contract Term

Question 2: *Does the thirty-six month term commence at contract execution, with transition-in activity performed within the term, or does it commence at service go-live on June 1, 2027 with transition-in performed beforehand? Relatedly, at what point following selection does CEA expect the selected contractor to begin transition activity?*

Response: The thirty-six month term is expected to commence at contract execution. CEA anticipates the Contractor will begin transition-in activities immediately following execution, with the RFP's target June 1, 2027 commencement date reflecting full service go-live at the conclusion of the transition period.

Scope & Award Structure

Question 3: *Section VI reserves CEA's right to award multiple contracts. Will CEA consider awarding the Data Manager scope and the Customer Contact Center scope separately, and will proposals covering only one of the two be evaluated?*

Response: CEA's preference is to award a single, integrated contract covering both the Data Manager and Customer Contact Center scopes. Consistent with RFP Section VI, CEA reserves the right to award multiple contracts if doing so is determined to be in CEA's best interest. Proposals covering only one scope area will be considered but should clearly identify which scope(s) are addressed. Per Amendment No. 1 (Section IV), regardless of whether a Proposer submits a single combined proposal or separate proposals for each scope, cost proposals must separately itemize and state total proposed costs for (a) Data Management and related services (RFP Sections 1, 2, 4, and 5) and (b) Customer Contact Center services (RFP Section 3), so that CEA may evaluate the cost of each scope of service independently.

Background, Current Environment & Incumbent

Question 4: *What has prompted CEA to seek a new Data Manager and Customer Contact Center provider at this time?*

Response: The agreement with our current provider expires at the end of May 2027.

Question 5: *What fees have been paid to the incumbent contractor during the past three years for the requested services?*

Response: Consistent with CEA's status as a public agency, fees paid under CEA's current services agreement are part of the public record. You can find the budget for 2026/2027 in the May 2026 board packet, and previous years are also available via our website.

Question 6: *Will CEA provide historical operational data and performance metrics from the incumbent contractor to support proposal development and pricing?*

Response: Please access our Board of Directors reports for call center and operations metrics.

Question 7: *Can CEA provide the historical monthly average volumes for customer enrollments, move-ins, move-outs, and account drops?*

Response: Please access our Board meeting agenda reports for our call center and operations metrics.

Question 8: *Please provide the current customer/account volumes by customer class, including residential, commercial, municipal, agricultural, and any other applicable classes.*

Response: Please access our Board meeting agenda reports for our call center and operations metrics.

Question 9: *Please provide historical and projected monthly volumes for new enrollments, opt-outs, drops, move-ins, move-outs, customer account changes, billing exceptions, rate changes, customer inquiries, complaints, email inquiries, web/portal inquiries, voicemails, and contact center calls.*

Response: CEA does not maintain most of the granular monthly counts requested here in a readily available form; much of this would require CEA to task the incumbent Contractor with a bespoke data pull solely to answer this question, which CEA does not consider a reasonable or proportionate use of the incumbent's time during an active competitive solicitation. Consistent with CEA's position that underlying usage/load volume is not necessary for an experienced vendor to price this scope of work, CEA will provide current contact center volumes and program participation counts (via Board meeting agenda packets on our website), which CEA already maintains as part of its standard reporting. CEA does not intend to compile historical enrollment, opt-out, move-in/move-out, billing exception, or account-change counts beyond what is already reflected in the RFP's Exhibit A reporting package.

Question 10: *Please provide an overview of CEA's current technology and service environment, including the incumbent Data Manager, CIS/billing platform, EDI platform, contact center technology, IVR, case management platform, data warehouse, reporting/BI tools, and relevant third-party applications.*

Response: The current Data Manager and Customer Contact Center services are provided by a single incumbent Contractor, whose environment includes a CRM and a data warehouse, both hosted and maintained by that Contractor. The specific architecture, configuration, and integration detail of the incumbent's technology environment is proprietary to that Contractor, and CEA cannot disclose it. Respondents should describe their own proposed technology environment and approach to migrating from, or integrating with, a CRM and data warehouse as part of their proposal.

Question 11: *Please identify the incumbent provider(s) currently performing the Data Management, Billing Administration, Customer Contact Center, QRE/WREGIS, and related services, and indicate which services are currently performed by each provider.*

Response: Currently we have a single contractor who is providing these services for CEA, this information is publicly available via our board meeting agenda packets on our website.

Question 12: *Can CEA provide an overview of the incumbent solution's architecture, including major interfaces, data flows, integrations with SDG&E, CAISO, WREGIS, printing/mailling vendors, collection agencies, and other third parties?*

Response: The categories of integration required are already described in RFP Section 1: EDI transaction processing with SDG&E, SQMD submission to CAISO, monthly generation reporting to WREGIS, and coordination with CEA's designated print/mail and collections vendors. The incumbent Contractor's specific architecture, data flows, and interface implementations for these integrations are proprietary to that Contractor, and CEA cannot disclose them. Respondents should describe their own proposed architecture and approach to each of these integrations as part of their proposal.

Question 13: *To enable bidders to develop accurate staffing, technology, transition, and pricing assumptions, will CEA provide a bidder data package containing historical customer volumes, account demographics, SDG&E EDI transaction volumes, interval data volumes, billing exception volumes, contact center volumes by channel and language, peak-period volumes, current staffing levels, report samples, and relevant system/interface documentation?*

Response: Certain operational metrics, including contact center volumes, are available in CEA's Board of Directors meeting materials, published at TheCleanEnergyAlliance.org. CEA expects respondents with relevant experience to be able to develop reasonable staffing and pricing assumptions based on the scope of services described in this RFP and their own comparable engagements, without requiring a full historical data package from CEA.

Data Management, EDI, CAISO/SQMD & QRE-WREGIS

Question 14: *Please provide the complete list of SDG&E EDI transaction types currently processed by CEA and identify the approximate monthly transaction volumes for each.*

Response: Please visit SDG&E Electronic Data Interchange Information webpage to view the required EDI data feeds and processes that will need to be managed by the respondent on behalf of CEA with SDG&E.

Question 15: *Please identify which SDG&E interfaces are currently automated and which, if any, require manual intervention.*

Response: Please visit SDG&E Electronic Data Interchange Information webpage to view the required EDI data feeds and processes that will need to be managed by the respondent on behalf of CEA with SDG&E.

Question 16: *Please provide historical EDI exception/error rates and the most common categories of EDI failures.*

Response: This information is managed by the incumbent and is unavailable to us.

Question 17: *What responsibilities currently reside with CEA versus the incumbent Contractor when resolving SDG&E EDI exceptions?*

Response: The Contractor is responsible for monitoring, managing, validating, securing, and resolving exceptions associated with EDI files received from SDG&E. CEA may engage as needed to assist with escalated issues. Reliable and accurate EDI data is critical to CEA's forecasting, settlements, customer analytics, and customer programs. Per Amendment No. 1 (RFP Section 1(a)), CEA considers demonstrated, hands-on EDI experience with SDG&E or a comparable California IOU (including experience with 814, 867, 810, and 820 transaction types), critical to successful performance of this scope, and the Contractor must be fully prepared to support CEA's data requirements as of the go-live date.

Question 18: *Please identify all SDG&E environments that the successful Contractor will be expected to support, including production, test, certification, and/or other environments.*

Response: The Contractor will be expected to support SDG&E's production, testing, and certification environments as needed for EDI transaction processing and periodic system changes.

Question 19: *What is the current average monthly volume of interval/AMI records received from SDG&E?*

Response: The incumbent vendor manages these transactions with SDG&E on CEA's behalf including ensuring the accuracy and completeness associated with the pertinent dataset. Please visit SDG&E Electronic Data Interchange Information webpage to view the required EDI data feeds and processes that will need to be managed by the respondent on behalf of CEA with SDG&E.

Question 20: *What percentage of CEA's approximately 255,000 accounts currently have 15-minute versus hourly interval data?*

Response: CEA does not maintain this split as a standalone metric separate from the underlying SDG&E interval data feeds. This is a function of SDG&E's own meter deployment across CEA's territory rather than a CEA-specific figure; however, it is critical that the Contractor is able to access and process 15-minute, hourly, and scalar data.

Question 21: *Please provide the current total size of the historical interval/AMI data repository.*

Response: CEA does not maintain or provide a specific storage-size figure for historical interval/AMI data. Total repository size depends on each vendor's own data model, record format, and compression approach; the same underlying record count (derivable from CEA's approximately 255,000 accounts and 15-minute/hourly interval frequency, per SDG&E's standard AMI metering practice, retained for the five-year period described in RFP Section 1(f)) will produce a different storage footprint depending on how a given system stores it. A figure from CEA's current environment would reflect the incumbent's specific technology choices, not a meaningful sizing input for a different proposed solution.

Question 22: *Please identify CEA's current Scheduling Coordinator and clarify whether the successful Contractor is expected to replace, interface with, or support the existing Scheduling Coordinator.*

Response: CEA's current Scheduling Coordinator will be identified to the selected Contractor as part of the transition process. Respondents should describe their experience interfacing with and supporting Scheduling Coordinators, as well as any experience serving as a Scheduling Coordinator on behalf of CCA clients.

Question 23: *Is CEA expecting the Contractor to submit SQMD directly to CAISO, or will CEA's Scheduling Coordinator remain responsible for final submission?*

Response: Please refer to Section 1(d) of the RFP. The Contractor must be capable of delivering validated SQMD to CEA's designated Scheduling Coordinator or securely submitting SQMD directly to CAISO on CEA's behalf.

Question 24: *Please provide historical SQMD volumes, submission frequency, and exception/rejection rates.*

Response: Submission frequency is governed by CAISO's settlement calendar rather than CEA-specific practice; please refer to the CAISO Meter Data Acquisition and Processing Procedure and CAISO SQMD Plan - Submission & Approval Process. SQMD volume is directly derivable from CEA's approximately 255,000 accounts and CAISO's required submission cadence, consistent with CEA's position on interval data volume more generally. Exception/rejection rates reflect the current Contractor's own system performance rather than a fixed characteristic of CEA's scope of work; a proposer's own rejection rate would depend on their proposed system, not CEA's historical experience with a different one. CEA does not consider this data necessary for proposal development.

Question 25: *Please identify all current CAISO data, settlement, forecasting, scheduling, and market-related responsibilities that fall within the intended Contractor scope.*

Response: Please refer to the RFP, including Section 1(d), regarding Settlement Quality Meter Data (SQMD) services and associated CAISO responsibilities. Respondents should describe their capabilities and experience supporting the CAISO-related data and settlement functions identified in the Scope of Services.

Question 26: *Are there anticipated changes to CEA's CAISO operating model during the initial contract term?*

Response: CEA is not currently aware of any material changes to its CAISO operating model anticipated during the initial contract term. However, CAISO and CPUC requirements may evolve, and the Contractor is expected to support CEA in maintaining compliance with applicable requirements as changes occur.

Question 27: *Please provide the current number and type of renewable energy projects for which QRE services are required.*

Response: CEA has one current project requiring QRE services, a small hydroelectric generator. Some solar facilities may also require QRE services in the future, but CEA has no immediate plans for additional QRE facilities.

Question 28: *Please provide the historical monthly generation-data volumes associated with these projects.*

Response: CEA does not consider historical generation-data volumes necessary for proposal development. The relevant sizing metric for QRE reporting services is the number of QRE-eligible generation facilities requiring monthly WREGIS reporting - up to approximately thirty (30), per RFP Section 1(e) - not the volume of energy each facility generates. A facility's output does not change the scope of the reporting obligation. CEA does not maintain or provide a separate generation-volume figure.

Question 29: *Is the requirement for QRE services expected to remain capped at approximately 30 resources, or does CEA anticipate expansion during the contract term?*

Response: Yes, the QRE cap is expected to remain at approximately thirty (30) generators/distributed energy resource projects, consistent with RFP Section 1(e).

Question 30: *Please clarify whether CEA currently holds any QRE-related registrations, certifications, or agreements that would need to be transferred or maintained by the Contractor.*

Response: CEA has one QRE registration which would need to be transferred and maintained by the contractor.

Billing Administration & Rate Support

Question 31: *Please clarify the methodology CEA will use to calculate the required 99% billing accuracy KPI.*

Response: CEA intends to calculate the monthly Billing Accuracy KPI as follows: $\text{Billing Accuracy \%} = \left[\frac{\text{Total Customer Bills Issued} - \text{Customer Bills with Contractor-Attributable Errors}}{\text{Total Customer Bills Issued}} \right] \times 100$

For purposes of this KPI, a billing error will generally include an incorrect bill resulting from an error attributable to the Contractor, including incorrect rate application, failure to appropriately identify or process usage-data anomalies, calculation errors, or other Contractor-controlled billing processing errors. Errors caused solely by source data or actions outside the Contractor's control, including errors originating from SDG&E or CEA-provided information, will not be counted against the Contractor, provided the Contractor followed required validation and quality-control procedures and did not cause or contribute to the error.

CEA expects the Contractor to maintain a Billing Accuracy rate of at least 99% each month and to provide sufficient supporting information for CEA to validate reported performance.

This also preserves an important distinction: the RFP requires the Contractor to perform pre-billing audits to identify account anomalies, usage spikes, and incorrect rate assignments. Therefore, we would not broadly exempt every SDG&E-originated data problem; if the vendor's required validation process reasonably should have detected the problem before billing, it could still be considered in determining Contractor-attributable error.

Question 32: *How will billing errors attributable to SDG&E data, CEA rate changes, customer-provided information, third-party systems, or other parties be excluded from the Contractor's billing accuracy calculation?*

Response: Billing errors will be included in the Billing Accuracy KPI only when the error is attributable to the Contractor. However, an error will not be excluded solely because it originated from an external source if the Contractor failed to perform required validation, quality-control, or exception-management procedures that reasonably should have identified or prevented the error before billing. The RFP specifically requires routine pre-billing audits to identify and correct account anomalies, extreme usage spikes, and incorrect rate assignments. The Contractor will be expected to document excluded errors, including the cause and responsible source, and provide supporting information sufficient for CEA to review and validate the exclusion.

Question 33: *How does CEA currently measure billing accuracy, and what has been the incumbent's historical performance against this metric?*

Response: CEA's billing accuracy expectations are outlined in the RFP. CEA is interested in understanding each respondent's demonstrated billing accuracy performance, quality-control processes, and ability to meet or exceed the required standard.

Question 34: *Please provide the approximate monthly volume of billing exceptions and adjustments.*

Response: CEA does not maintain this as a standalone metric.

Question 35: *Please provide the historical volume and types of retroactive billing adjustments.*

Response: CEA does not maintain this as a standalone metric.

Question 36: *What is CEA's current process for resolving customer billing disputes, and what percentage are currently resolved within two billing cycles?*

Response: Please refer to RFP, which requires the Contractor to remedy billing errors within two billing cycles on a going-forward basis.

Question 37: *Please provide the current CEA rate structures and the approximate number of active rate configurations that must be supported.*

Response: CEA's currently effective rate schedules are publicly posted at TheCleanEnergyAlliance.org.

Question 38: *How frequently have CEA rate changes historically occurred?*

Response: CEA's historically effective rate schedules are publicly posted at TheCleanEnergyAlliance.org.

Question 39: *What is CEA's expected turnaround time for implementing a new rate or rate modification?*

Response: CEA expects new rates and rate modifications to be implemented in a timely manner following Board approval and in coordination with applicable billing cycles and effective dates. Implementation timelines may vary depending on the complexity and urgency of the rate change, and certain changes may require an expedited turnaround. Respondents should describe their standard implementation timelines, their ability to accommodate expedited rate changes, and any technical or operational limitations that could affect implementation.

Question 40: *Does CEA expect the Contractor to develop, test, validate, and implement rate changes independently, subject to CEA approval?*

Response: Yes.

Question 41: *What level of rate modeling and 'what-if' analysis does CEA expect the Contractor to provide?*

Response: CEA expects the Contractor to provide rate modeling and “what-if” analysis sufficient to evaluate proposed rate changes, customer impacts, revenue implications, and comparisons across customer classes and rate structures. Respondents should describe their available modeling tools and capabilities.

Question 42: *Please identify all current NEM programs, customer incentives, special tariffs, and other specialized billing programs that must be supported.*

Response: CEA's current Net Energy Metering policy and customer program offerings are described on CEA's website.

Question 43: *Please provide current enrollment volumes for each specialized program.*

Response: Please access our Board of Directors reports for our Programs metrics.

Customer Contact Center

Question 44: *Section 3.d names Spanish, Tagalog, Cantonese and Mandarin. Are live agents required in all four languages during all operating hours, or is a translation service acceptable for lower-volume languages?*

Response: Contractor must use commercially reasonable efforts to make Spanish speaking call center staff available to customers during regular business hours; translation services are acceptable for Cantonese, Mandarin, and Tagalog, as well as Spanish, when a live agent is temporarily unavailable.

Question 45: *Does CEA require live-agent support in all four languages at all times, or may translation services be utilized when bilingual agents are unavailable?*

Response: Contractor must use commercially reasonable efforts to make Spanish speaking call center staff available to customers during regular business hours; translation services are acceptable for Cantonese, Mandarin, and Tagalog, as well as Spanish, when a live agent is temporarily unavailable.

Question 46: *What are CEA's current contact center operating hours, and what after-hours or emergency coverage does CEA expect?*

Response: During non-enrollment periods, CEA's call center hours are Monday through Friday, 8 AM to 5 PM, excluding CEA, SDG&E, and Contractor holidays ("Regular Business Hours"). During enrollment periods, hours extend from 8 AM to 7 PM. We do not expect after-hours or emergency coverage.

Question 47: *What are CEA's expected contact center operating hours, including weekends and holidays?*

Response: During non-enrollment periods, CEA's call center hours are Monday through Friday, 8 AM to 5 PM, excluding CEA, SDG&E, and Contractor holidays ("Regular Business Hours"). During enrollment periods, hours extend from 8 AM to 7 PM.

Question 48: *Does CEA have a preference or requirement regarding where contact center agents are physically located, including any requirement for United States or California based agents?*

Response: CEA does not require Contact Center agents to be physically located within CEA's service territory. Given the data privacy and confidentiality expectations described in RFP Section 6(b), CEA does expect the Contractor to describe its staffing location strategy, including the extent of any U.S.-based presence.

Question 49: *Can CEA provide historical contact center metrics for the past 24 months, including inbound call volumes, email and web inquiries, average handle time, abandonment rates, seasonal peaks, and service-level performance?*

Response: Please access our Board meeting agenda reports for our call center and operations metrics.

Question 50: *Please provide historical peak-period volumes for the past 24 months and identify the events that generated those peaks.*

Response: Assuming this is associated with the call center, please access our latest Board of Directors reports for our latest call center and operations metrics.

Question 51: *Please provide historical monthly contact volumes for the previous 24 months, including average and peak daily/hourly volumes.*

Response: Please access our Board of Directors reports for our call center and operations metrics.

Question 52: *Can CEA provide historical and projected demand for multilingual support, including Spanish, Tagalog, Cantonese, Mandarin, and other languages?*

Response: Roughly 15% of our call center calls are conducted in Spanish. We do not have statistics on other languages.

Question 53: *Please provide historical contact volumes by language and identify the expected percentage of interactions requiring Spanish, Tagalog, Cantonese, and Mandarin support.*

Response: Roughly 15% of our call center calls are conducted in Spanish. We do not have statistics on other languages.

Question 54: *Please provide the current contact center staffing model, including average staffing levels, operating hours, language staffing, and any seasonal staffing adjustments.*

Response: This is an area where CEA is relying on the Contractor's expertise. CEA invites Proposers to describe their recommended approach and the rationale behind it as part of their technical proposal; this will be considered as part of the evaluation of proposed approach and qualifications. During non-enrollment periods, CEA's call center hours are Monday through Friday, 8 AM to 5 PM, excluding CEA, SDG&E, and Contractor holidays ("Regular Business Hours"). During enrollment periods, hours extend from 8 AM to 7 PM. We do not expect after-hours or emergency coverage. Contractor must use commercially reasonable efforts to make Spanish speaking call center staff available to customers during regular business hours; translation services are acceptable for Cantonese, Mandarin, and Tagalog, as well as Spanish, when a live agent is temporarily unavailable.

Question 55: *What percentage of current customer interactions are received through voice, email, web portal, and other digital channels?*

Response: Most of our customer interactions are received through calls at our call center.

Question 56: *Does CEA anticipate 24/7 support requirements or after-hours emergency/escalation support?*

Response: CEA does not anticipate requiring 24/7 support or routine after-hours support. Any emergency or escalation support needs outside regular business hours would be addressed as necessary with the selected Contractor.

Question 57: *Are there additional languages CEA anticipates requiring during the contract term?*

Response: CEA does not currently anticipate requiring additional languages beyond those identified in the RFP. Respondents should describe their ability to accommodate additional languages should CEA's service territory or customer needs change during the contract term.

Question 58: *Please clarify whether the Contractor will be responsible for outbound calling campaigns, proactive customer notifications, enrollment campaigns, collections-related calls, or other outbound activities.*

Response: The Contractor may be required to conduct outbound calling activities from time to time at CEA's direction. Respondents should describe their outbound calling capabilities, capacity, and relevant experience as part of their proposal.

Question 59: *Please identify the anticipated responsibilities of CEA staff versus Contractor contact center personnel for escalated customer issues.*

Response: The Contractor is expected to manage first- and second-level customer escalations. CEA staff will engage as needed for escalated matters requiring CEA review, direction, or a policy-level decision.

Question 60: *What categories of customer issues currently require escalation to CEA staff, and what percentage of total contacts are escalated?*

Response: This varies widely. Only a small percentage of customer interactions are escalated to the CEA team.

Question 61: *Is CEA expecting the Contractor to provide workforce management, forecasting, scheduling, quality management, training, knowledge management, and contact center reporting as part of the base scope?*

Response: Yes. Workforce management, forecasting, scheduling, quality management, training, knowledge management, and contact center reporting are expected to be included within the base scope of Customer Contact Center services described in Section 3 of the RFP.

Data Governance, Analytics, Reporting, Security & AI

Question 62: *Can CEA provide sample reports or additional specifications for the reporting requirements identified in Exhibit A, including expected data elements, formats, and delivery methods?*

Response: The reporting and operational metrics referenced across these questions are generated by CEA's current Contractor. Under CEA's existing services agreement, these items are proprietary to that Contractor, and CEA cannot disclose them.

Question 63: *Please provide examples of existing reports and dashboards that CEA considers critical beyond the minimum Exhibit A reporting requirements.*

Response: The existing reports and dashboards CEA uses are considered propriety to the incumbent contractor and cannot be provided.

Question 64: *Please provide sample copies of the current Exhibit A reports, including layouts, data definitions, calculations, and historical examples.*

Response: The existing reports and dashboards CEA uses are considered propriety to the incumbent contractor and cannot be provided.

Question 65: *Are there specific data-retention, archival, recovery-point, or recovery-time requirements beyond the five-year rolling archive specified in the RFP?*

Response: No

Question 66: *Does CEA currently own its CIS/data warehouse technology, or is the expectation that the successful Contractor will provide the underlying platform?*

Response: Currently, CEA expects the Contractor to provide the underlying platform.

Question 67: *Is CEA seeking a replacement CIS/data warehouse solution or continuation/modernization of its current environment?*

Response: CEA is seeking a Contractor-provided platform. Whether this constitutes a replacement of, or continuation/modernization of, the current environment will depend on the Contractor's proposed solution and transition approach.

Question 68: *Please identify the number and roles of CEA users requiring access to the CIS and analytics environment.*

Response: All CEA employees will require access to the CIS and analytics environment.

Question 69: *What level of self-service reporting capability does CEA expect users to have?*

Response: CEA expects a substantial degree of self-service autonomy, consistent with RFP Section 4(c). CEA staff should be able to independently run ad-hoc queries, generate reports, and pull data and metrics as needed, without submitting a request to the Contractor for each instance.

Question 70: *Is CEA open to a modern cloud-based data platform and BI solution if it provides enhanced real-time analytics and self-service capabilities?*

Response: Yes, if customer privacy protocols are in alignment with CPUC data privacy regulations

Question 71: *Does CEA have preferred BI, visualization, database, cloud, or reporting technologies that bidders should accommodate?*

Response: No. Through this RFP, CEA is seeking proposals from qualified respondents to provide professional services for Data Management and Customer Contact Center services along with the specific and requisite technology platforms and their integration required for successful provision of the requested services. CEA expects for the respondents to articulate what those technology platforms and tools are as part of their proposal submittals.

Question 72: *Please identify which reports must maintain the existing format for downstream CEA processes.*

Response: This will be addressed collaboratively with the selected Contractor during the transition-in period described in RFP Section 5(a), once CEA has visibility into the Contractor's proposed solution and can determine what mapping or adjustment, if any, is needed for downstream processes. This level of detail is not necessary for proposal development or evaluation.

Question 73: *Is CEA open to replacing recurring static reports with dashboards or self-service reporting where all required data elements and auditability are maintained?*

Response: Yes, as long as customer privacy protocols are in alignment with CPUC data privacy regulations

Question 74: *Please identify any reports currently consumed by external agencies, auditors, financial institutions, regulators, or other third parties.*

Response: This will be addressed collaboratively with the selected Contractor during the transition-in period described in RFP Section 5(a), once CEA has visibility into the Contractor's proposed solution and can determine what mapping or adjustment, if any, is needed for downstream processes. This level of detail is not necessary for proposal development or evaluation.

Question 75: *Please identify the specific security frameworks, certifications, and controls CEA expects the Contractor to maintain, such as SOC 2 Type II, ISO 27001, NIST, PCI DSS, or other standards.*

Response: This is an area where CEA is relying on the Contractor's expertise. Rather than prescribe specific security frameworks or certifications, CEA invites Proposers to describe their applicable security frameworks, certifications, and controls as part of their technical proposal; this will be considered as part of the evaluation of proposed approach and qualifications. At minimum, any proposed approach must comply with CEA's Privacy and Customer Confidentiality Policy (CEA-03), Protection of Confidential Information Policy (CEA-02), and the confidentiality and data security expectations described in RFP Section 6(b).

Question 76: *Does CEA require customer data to remain within the United States?*

Response: Yes. CEA requires customer data to be stored and processed within the United States.

Question 77: *Are there specific requirements regarding offshore personnel, offshore support, or work-at-home agents?*

Response: CEA does not categorically prohibit offshore support personnel, but expects the Contractor to describe any offshore involvement, associated data-handling safeguards, and how it aligns with the confidentiality and security expectations in RFP Section 6(b).

Question 78: *Please clarify CEA's expectations regarding encryption at rest and in transit, privileged access management, MFA, vulnerability management, penetration testing, and security monitoring.*

Response: This is an area where CEA is relying on the Contractor's expertise. Rather than prescribe specific encryption, access-management, or security-testing protocols, CEA invites Proposers to describe their recommended approach and the rationale behind it as part of their technical proposal; this will be considered as part of the evaluation of proposed approach and qualifications. At minimum, any proposed approach must comply with CEA's Privacy and Customer Confidentiality Policy (CEA-03), Protection of

Confidential Information Policy (CEA-02), and the confidentiality and data security expectations described in RFP Section 6(b).

Question 79: *Does CEA have specific RTO/RPO requirements for the CIS, billing, EDI, and contact center platforms?*

Response: CEA does not maintain specific numeric RTO/RPO targets for the CIS, billing, EDI, or contact center platforms. For any platform outage or significant service disruption (distinct from the data security breach notification requirement in RFP Section 4(e)), CEA expects the Contractor to: (a) notify CEA immediately upon detection, (b) maintain a documented contingency/failover plan for each platform. Respondents should describe their proposed approach to meeting these expectations as part of their technical proposal.

Question 80: *Regarding AI, please clarify whether CEA allows the use of generative AI, AI-enabled quality assurance, AI-powered agent assistance, chatbots, AI-powered analytics, machine learning, automated transcription, or AI-based forecasting.*

Response: CEA does not categorically prohibit the use of AI-enabled tools. Respondents should clearly identify any proposed use of generative AI, AI-enabled quality assurance, agent assistance, chatbots, analytics, machine learning, automated transcription, forecasting, or similar technologies and describe applicable data privacy, security, confidentiality, and human-oversight controls. CEA customer data may not be used to train public or third-party AI models or otherwise be exposed in a manner inconsistent with CEA's confidentiality and security requirements.

Question 81: *Is CEA open to AI capabilities that operate within a private, controlled environment where CEA customer data is not used to train public or third-party models?*

Response: Yes. CEA is generally open to AI capabilities operating within a private, access-controlled environment that does not use CEA or customer data to train public or third-party models, subject to the confidentiality and security expectations described in RFP Section 6(b). Respondents should describe their specific AI governance controls as part of their proposal.

Transition Services

Question 82: *Does CEA have a view on the minimum transition period it considers adequate for approximately 255,000 accounts?*

Response: No. Respondents to this RFP should articulate in their proposal submittals the transition timeframe required to have seamless transition of the systems, processes and applications that our incumbent vendor currently handles on behalf of CEA.

Question 83: *Will CEA provide incumbent system documentation, interface specifications, data dictionaries, process documentation, historical reports, configuration documentation, and other operational artifacts during transition?*

Response: Generally no, data will only be provided to the degree to which we are permitted based on our current agreement.

Question 84: *Will CEA provide access to SDG&E interface specifications and certification requirements during the transition period?*

Response: SDG&E interface specifications and applicable certification requirements will be made available to the selected Contractor during the transition period, consistent with SDG&E's standard onboarding process for CCA service providers.

Question 85: *Please provide the incumbent contract expiration/termination date and confirm the amount of time the incumbent is obligated to support knowledge transfer and transition activities.*

Response: The agreement with our current provider expires at the end of May 2027. The incumbent would take commercially reasonable steps to ensure the orderly and effective transition of the services to a successor contractor.

Question 86: *Will CEA require the incumbent to participate in structured knowledge-transfer sessions with the selected Contractor?*

Response: Yes. CEA expects its current Contractor to reasonably support a structured knowledge-transfer process with the successful Proposer.

Question 87: *Please provide the anticipated availability of incumbent personnel and system SMEs during transition.*

Response: This will depend on final scope.

Question 88: *What historical customer, billing, usage, transaction, correspondence, and interaction data will be transferred to the new Contractor?*

Response: Historical customer, billing, usage, transaction, and correspondence data maintained by the current Contractor is expected to be transferred to new Contractor, and CEA's data retention practices under CEA'S Privacy and Customer Confidentiality Policy (generally five years, and not less than two).

Question 89: *In what format will the incumbent provide the historical data?*

Response: The specific data format will depend on the current Contractor's systems and the successful Proposer's ingestion requirements. RFP requires data to be provided in a mutually agreed format.

Question 90: *Will CEA provide a representative historical data set for bidders to evaluate during proposal preparation?*

Response: CEA believes the RFP contains all pertinent information required to prepare proposals.

Question 91: *What level of parallel processing/testing does CEA expect before production cutover?*

Response: This is an area where CEA is relying on the Contractor's expertise. CEA invites Proposers to describe their recommended approach and the rationale behind it as part of their technical proposal; this will be considered as part of the evaluation of proposed approach and qualifications.

Question 92: *Is the June 1, 2027 commencement date a hard production go-live date, or may CEA accommodate a phased transition?*

Response: This is a hard production go-live date.

Question 93: *Does CEA anticipate any customer enrollment or rate events occurring during the transition period that could affect the cutover plan?*

Response: Rate events and customer enrollments are ongoing and may occur during the transition period.

Question 94: *Please clarify what transition-out activities CEA considers included within the base contract price versus separately billable services.*

Response: Transition-out activities consistent with RFP are expected to be included within the base scope of services at no additional cost to CEA, beyond reasonable, pre-disclosed labor costs as described in that section.

Question 95: *What minimum data format and documentation standards will CEA require for transition-out?*

Response: Specific format and documentation standards will be mutually agreed and documented as part of the definitive agreement.

Future Growth / Service Territory Expansion

Question 96: *Does CEA expect interval data volumes to increase materially as additional member agencies join CEA?*

Response: Yes. CEA's interval/AMI data volumes would be expected to increase proportionally if additional member agencies join CEA during the contract term; see also RFP Section II regarding potential service territory expansion.

Question 97: *Does CEA anticipate launching additional customer programs during the contract term that would require billing-system modifications?*

Response: CEA may introduce new Board-approved customer programs during the contract term. The Contractor should describe its capability to support new program administration, enrollment, and billing configuration as such programs arise, consistent with RFP.

Question 98: *Please provide CEA's current expectations regarding potential expansion of the service territory during the initial three-year contract term.*

Response: Currently, CEA is not expecting an expansion in the near future, however that is subject to change.

Question 99: *Are there specific agencies currently being considered for future CEA membership?*

Response: No

Question 100: *If additional agencies join CEA, should bidders assume the Contractor will provide all incremental data management, billing, contact center, and reporting services associated with those customers?*

Response: Yes.

Pricing & Commercial Terms

Question 101: *What is the estimated total value of the contract, including any optional renewal periods?*

Response: CEA's current annual operating budget, including contracted services of this nature, is publicly available in CEA's Board-approved Annual Budget.

Question 102: *Does CEA have a preferred pricing methodology (e.g., fixed fee, per-customer, per-meter, transaction-based, contact-center-volume based, or hybrid)?*

Response: Per Amendment No. 1 to this RFP, cost proposals must be structured on a per-account basis — i.e., a fee expressed per distinct CEA customer account, defined as the unique combination of an IOU account number and Service Delivery Point (not a per-meter fee structure) — whether fixed, variable, or a combination of both. Respondents must clearly identify and itemize all costs by year and task, including implementation or start-up costs, recurring service fees, optional services, and any other costs relevant to the Scope of Services, as required by the RFP.

Question 103: *Does CEA have a preferred pricing methodology, such as fixed fee, per-account-per-month, transaction-based, FTE-based, or a hybrid model?*

Response: Per Amendment No. 1 to this RFP, cost proposals must be structured on a per-account basis — i.e., a fee expressed per distinct CEA customer account, defined as the unique combination of an IOU account number and Service Delivery Point (not a per-meter fee structure) — whether fixed, variable, or a combination of both. Respondents must clearly identify and itemize all costs by year and task, including implementation or start-up costs, recurring service fees, optional services, and any other costs relevant to the Scope of Services, as required by the RFP.

Question 104: *Will CEA evaluate pricing based on a per-account/unit-cost model to accommodate future customer growth?*

Response: CEA would consider this.

Question 105: *What customer growth assumptions should bidders use for pricing purposes over Years 1--5?*

Response: Respondents should assume CEA's current customer base of approximately 255,000 accounts as the pricing baseline, with no material growth assumed unless a specific member agency addition is Board-approved during the proposal period.

Question 106: *Should bidders provide pricing based on the current approximately 255,000 accounts or provide tiered pricing based on account growth?*

Response: Please provide a price based on CEA's current approximately 255,000 accounts as the baseline for the initial term and describe pricing approach for any service territory expansion (thresholds, ranges, per account prices, etc.).

Question 107: *How should bidders price future CEA expansion or material increases in transaction/contact volumes?*

Response: Respondents may note in their proposal how pricing would scale with material account growth.

Question 108: *Are bidders permitted to identify assumptions and exclusions associated with their proposed pricing?*

Response: Yes.

Question 109: *How does CEA intend to evaluate pricing differences between proposals using materially different operating models or technology approaches?*

Response: 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 consistent with CEA's policies.

Contract Terms

Question 110: *Does CEA expect all technology licensing, cloud infrastructure, telecommunications, recording, IVR, CRM/CIS, reporting, and security costs to be included in the proposed fees?*

Response: Yes.

Question 111: *Please clarify whether CEA expects travel and onsite support costs to be included in the fixed fee or reimbursed separately.*

Response: Travel and onsite support costs will be discussed and negotiated separately and, if approved, reimbursed separately from the fixed fee. CEA anticipates that onsite support needs will be minimal.

Question 112: *Will CEA provide a draft Professional Services Agreement (PSA) to bidders before proposal submission?*

Response: Yes, already provided. See Attachment 1 on Solicitations page.

Question 113: *Will CEA provide a draft SLA/KPI schedule for review?*

Response: CEA does not anticipate issuing a separate draft SLA/KPI schedule. The Minimum Performance Floor identified in the RFP reflects CEA's current service-level expectations and is anticipated to be incorporated into the final agreement with the selected Contractor.

Question 114: *Will financial remedies, service credits, or other contractual remedies apply if SLAs are not achieved?*

Response: CEA's draft Professional Services Agreement does not currently include specific financial remedies or service credits tied to SLA performance. Performance-based remedies, if applicable, may be negotiated with the selected Contractor as part of the final agreement.

Question 115: *Are bidders permitted to propose alternative or enhanced SLA structures where they believe they provide better service outcomes?*

Response: Yes.

Question 116: *Please clarify which performance metrics will be incorporated into the final contract versus used solely for proposal evaluation.*

Response: The performance metrics identified in the RFP are expected to inform both proposal evaluation and the final agreement. Specific requirements for measuring, tracking, and reporting each applicable metric will be finalized during contract negotiations with the selected Contractor.

Proposal Requirements, Team & Qualifications

Question 117: *Section IV requires financial statements from the prior two years and credit ratings from two of Standard & Poor's, Moody's or Fitch. Where a proposal is submitted by a team, does CEA require these from the lead proposer only, or may they be provided by a named team member performing a material portion of the Services?*

Response: Financial statements are requested from the primary company or companies fulfilling the requested scope of services.

Question 118: *Will CEA consider equivalent evidence of financial capacity, such as audited financial statements together with a performance bond or an irrevocable letter of credit sized to the annual contract value, in place of agency credit ratings?*

Response: Yes.

Question 119: *Section VIII and the Supplier Diversity paragraph reference a "Response Form" in which the Supplier Diversity questionnaire is linked. No Response Form appears to have been posted with the RFP package. Can CEA provide it?*

Response: Please see our Clean Energy Alliance Supplier Diversity Survey. Proposers are encouraged to complete the survey as part of their submittal.
<https://docs.google.com/forms/d/e/1FAIpQLScaFbrl4g3YZmphXMSEz4OanAVBOi28aBJmjPoPkoKqe2rhig/vi ewform>

Question 120: *Does CEA require responses to be organized according to Sections 1-6 of the Scope of Services, or may respondents use an alternative format provided all requirements are addressed?*

Response: CEA does not require a specific response format, but recommends organizing responses to align with RFP Sections 1 through 6 (Scope of Services) to facilitate evaluation.

Question 121: *Does CEA expect resumes for all proposed key personnel, or are biographies, position descriptions, and organizational charts sufficient?*

Response: Biographies, position descriptions, and organizational charts will suffice.

Question 122: *For the three required project references, must all references be California-based IOUs, POU, ESPs, or CCAs, or may respondents include comparable customer information system, billing, and customer contact center engagements from other utility or public-sector organizations?*

Response: References are not required to be exclusively California-based IOUs, POU, ESPs, or CCAs. However, as stated in RFP Section I (Introduction & Background), to qualify for consideration, all respondents must demonstrate experience providing the services sought in this RFP within the State of California, for an IOU, POU, ESP, or CCA. Accordingly, while proposers may include comparable CIS, billing, and customer contact center engagements from other utility or public-sector organizations among their three required references, at least one reference must demonstrate the requisite California-based experience described in RFP Section I in order to establish eligibility.

Evaluation & Selection Process

Question 123: *Can CEA provide the evaluation scoring methodology and relative weighting of evaluation criteria?*

Response: Yes, please see Attachment 3 for the Supplemental Bid Evaluation Criteria.

Question 124: *Please provide the relative weighting or scoring methodology for the evaluation criteria, including price/best value, technical approach, relevant experience, transition plan, staffing, technology, and service levels.*

Response: Yes, please see Attachment 3 for the Supplemental Bid Evaluation Criteria.

Question 125: *Will CEA consider interviews, demonstrations, oral presentations, solution demonstrations, or finalist negotiations as part of the evaluation?*

Response: Yes, any of these may apply.

Question 126: *If CEA conducts finalist presentations, will bidders be provided with a standardized presentation format or set of questions?*

Response: CEA does not currently anticipate requiring a standardized presentation format or predetermined set of questions for finalist interviews, though CEA may provide topics or areas of focus in advance if interviews are conducted.

Question 127: *Will CEA evaluate proposed enhancements and innovations separately from the mandatory requirements?*

Response: Proposed enhancements and innovations will be considered as part of the overall evaluation of proposed approach and methodology rather than scored as a separate, standalone category.

Question 128: *Please clarify CEA's desired future-state technology model. Is CEA seeking a fully managed solution utilizing the Contractor's proprietary technology platforms, operation and enhancement of CEA's*

existing technology environment, or a hybrid model? Please identify any existing CEA owned platforms that the successful Contractor will be required to retain and operate.

Response: CEA is seeking a Contractor-provided platform that meets the requirements of the RFP. Whether the proposed solution represents a replacement, continuation, or modernization of the current environment will depend on the Contractor's proposed solution and transition approach.