



SAN DIEGO COMMUNITY POWER

REQUEST FOR PROPOSALS

FOR

COMMERCIAL ENERGY ASSISTANCE PROGRAM (CEAP)

Date of Issuance: March 30, 2026

**Submittals Due:
Proposal Submission Deadline: April 29, 2026**

No. 26-002

**SAN DIEGO COMMUNITY POWER
COMMERCIAL ENERGY ASSISTANCE PROGRAM (CEAP)**

I. BACKGROUND AND INTRODUCTION

San Diego Community Power (“Community Power”), a Joint Powers Authority, is the default electricity provider for the Cities of Chula Vista, Encinitas, Imperial Beach, La Mesa, National City, and San Diego and the County of San Diego’s unincorporated areas. Community Power’s Joint Powers Agreement (“JPA”) is the first in California with the objective to achieve 100 percent renewable energy by no later than 2035, which is in advance of current State targets. Community Power began service in 2021 and completed enrolling customers in 2024. This enrollment covered approximately 960,000 customer accounts. For more information, please visit Community Power’s website.¹ Proposers shall review Community Power’s Procurement Policy² and Inclusive and Sustainable Workforce Policy³ to ensure compliance when drafting proposals.

Through this Request for Proposals (“RFP”), Community Power is seeking proposals from qualified firms⁴ to administer and implement Community Power’s Commercial Energy Assistance Program (“CEAP”) (the “Services”). These Services are sought in order to:

- Increase awareness of and access to energy efficiency and Distributed Energy Resource (“DER”) opportunities for Community Power’s large and medium non-residential customers.
- Educate Commercial, Public, Agricultural, and Industrial customers about the full range of utility, state, and federal energy programs available to them.
- Offer hands-on support and personalized guidance to help customers understand their energy needs, explore energy efficiency and decarbonization options, and take the next steps to upgrade equipment.
- Simplify customer access to funding by reducing administrative burdens and streamlining the customer application process for incentives and energy efficiency programs.
- Deliver technical assistance and project scoping support to customers, including direct help with preparing and submitting funding applications.
- Measure impact by collecting and analyzing data on customer engagement, project outcomes, and funding success to inform future program design.

¹ www.sdcommunitypower.org

² https://sdcommunitypower.org/wp-content/uploads/2022/08/SDCP-Procurement-Policy_Adopted_2022.07.28.pdf

³ https://sdcommunitypower.org/wp-content/uploads/2022/02/SDCP_ISWF-Policy.pdf

⁴ Use of the term “firm” throughout this document shall mean individual proprietorship, partnership, limited liability company, corporation (whether for profit or not-for-profit), joint venture, or other public or private entity duly existing and operating under California law or authorized to do business in California.

- Increase awareness of and access to energy efficiency and Distributed Energy Resource (“DER”) opportunities for Community Power’s large and medium non-residential customers.
- Educate Commercial, Public, Agricultural, and Industrial customers about the full range of utility, state, and federal energy programs available to them.
- Serve as a trusted resource by maintaining and sharing up-to-date information on energy efficiency, electrification, and decarbonization funding opportunities.
- Offer hands-on support and personalized guidance to help customers understand their energy needs, explore their options, and take the next steps to upgrade equipment, improve efficiency, or apply for funding opportunities.
- Simplify customer access to funding by reducing administrative burdens and streamlining the customer application process for incentives and programs.
- Deliver technical assistance and project scoping support to customers, including direct help with preparing and submitting funding applications.
- Strengthen customer relationships by offering high-value, personalized services that build trust and long-term engagement.
- Measure impact by collecting and analyzing data on customer engagement, project outcomes, and funding success to inform future program design.

The anticipated contract start date is July/August 2026, with services continuing through May/June 2028.

II. PROPOSAL SCHEDULE

The estimated timetable for this RFP is as follows:

Description	Date
Release of RFP	March 30, 2026
Questions Due	April 10, 2026, at 12:00PM Pacific Time
Responses to Questions Provided	April 17, 2026
Proposals Due	April 29, 2026, at 2:00PM Pacific Time
Interviews	May 18, 2026 – May 29, 2026
Notice of Intent to Award	June 2026
Board of Directors Approval	June/July 2026
Execution of Agreement	Upon Board Approval
Commencement of Work	July/August 2026

The above schedule is tentative and subject to change at the sole discretion of Community Power. Nothing in this RFP shall be deemed to bind Community Power to award an agreement for the described Services, and Community Power retains the right to modify or cancel this RFP at any time.

III. QUESTIONS AND RESPONSES

Proposers may submit questions regarding this RFP electronically to SDCP.

Questions are due on April 10, 2026, by 12:00 P.M. (Pacific Time).

Questions must be submitted using the online form: <https://wkf.ms/48k40nV>
Responses to questions will be provided by April 17, 2026.

When submitting questions, please specify which section of the RFP you are referencing and quote the language that prompted the question. Questions may address issues or concerns that the evaluation criteria and/or business requirements would unfairly disadvantage Proposer or, due to unclear instructions, may result in SDCP not receiving the best possible responses from Proposer. SDCP will provide responses to questions as they are received.

For questions after the Questions deadline, and ONLY regarding the procurement process, proposers may submit questions via email to pspounaisflynn@sdcommunitypower.org with a copy to nep@sdcommunitypower.org.

IV. PROPOSAL SUBMISSION DEADLINE

Proposals should be submitted electronically to SDCP as a **single PDF document**.

Proposals are due on April 29, 2026, by 2:00 P.M. (Pacific Time).

Proposals must be submitted using the online form: <https://wkf.ms/4tf1iYV>

It is the sole responsibility of the Proposer to ensure that their proposal is received before the submission deadline. Proposers shall bear all risks associated with delays in delivery. Any Proposals received after the scheduled closing date and time for receipt of proposals may not be accepted.

V. REQUEST FOR PROPOSALS

A. Scope of Services

The Services sought under this RFP are set forth in more detail in the contemplated scope of work attached herein as **Attachment A** and incorporated herein by reference. Notwithstanding the inclusion of such Services in **Attachment A**, the final scope of Services negotiated between Community Power and the successful proposer(s) shall be set forth in the Professional Services Agreement (the "Agreement") executed by and between Community Power and the successful proposer(s). A copy of the Agreement is attached hereto as **Attachment B**.

B. Content and Format of Proposal

Proposals shall be concise, well organized, and demonstrate qualifications, applicable experience, and the approach necessary to provide the tasks in **Attachment A**. An **Attachment C** (Proposal Checklist) has been included in this RFP to assist proposers with preparing and submitting a complete proposal. **Attachment C** must be submitted with the Proposal.

Proposals should be submitted as a single combined PDF file (per category), in Calibri 12-pt font, be single-spaced with 1-inch margins and include the following items shown in this section and in the order listed all in a single combined PDF file (per category):

1. **Table of Contents: (Limit: 1 page)**
2. **Cover Letter⁵: (Limit: 1 page)**
 - a. Legal name and address of the company.
 - b. Legal form of company (partnership, corporation).
 - c. If company is a wholly owned subsidiary of a “parent company,” identify the “parent company.”
 - d. Name, title, address and telephone number of the proposed representative to contact concerning the Proposal Submittal.
 - e. California Business License Number
3. **Experience & Qualifications Narrative: (Limit: 3 pages)** Provide Experience and Qualifications Narrative that addresses the following:
 - a. The proposer’s experience delivering or coordinating the scope of work identified in **Attachment A**, including the number of years of experience, types and sizes of clients, and approximate number of clients.
 - b. The proposer’s experience working with California Community Choice Aggregators (“CCAs”), working within the energy regulatory landscape, or working with California Investor-Owned Utilities.
 - c. The proposer’s experience providing program management for commercial energy efficiency or similar program(s) and working directly with program participants or customers participating in these programs.
 - d. To the extent that a Proposer lacks specific expertise in any of the areas described in **Attachment A**, a professional team of subcontractors should be assembled by the proposer to complement their technical expertise. Please include any subcontractors that will support the delivery of the proposed solution described in **Attachment A**.

⁵ The Cover Letter shall be signed by an individual, partner, officer or officers authorized to execute legal documents on behalf of the proposer.

- e. A high-level organizational structure of the team or organizational chart with all proposed team members.
4. **Proposed Approach Narrative: (Limit: 5 pages)** Provide a Proposed Approach Narrative that addresses the following:
- a. The proposed approach to meeting the capabilities and tasks described in **Attachment A** and the collaborative approach to working with Community Power.
 - b. Identify the methods to be used in the completion of and/or carrying out the capabilities and tasks described in **Attachment A**.
 - c. Explain common implementation challenges and how your entity will work with Community Power to resolve those challenges and stay on course to achieve program goals.
 - d. Include services deemed relevant to the successful accomplishment of the contemplated scope of work described in **Attachment A**.
5. **Price Proposal:** Submittal of **Attachment A-2** that addresses the following:
- a. Provide the total cost on **Attachment A-2** for the proposer to deliver the scope of work described in **Attachment A**. Proposers are to complete and submit **Attachment A-2** and include costs associated for all contractor labor, overhead, materials, travel, subcontractor expenses, and any other costs necessary to fully execute the scope of work as described. Partial or incomplete submittal of **Attachment A-2** will not be considered responsive.
6. **Resumes and Qualifications: (Limit:1 page per team member)** Provide resumes and qualifications of the key personnel who will be responsible for delivering the contemplated scope of work identified in **Attachment A**.
7. **Applicable Engagements or References: (Limit: 1 page per applicable engagement or reference)** Provide brief summaries of three (3) engagements or references that are similar to the contemplated scope of work described in **Attachment A**. See **Attachment E** for the Reference template that should be filled out and included along with the proposer's submission.
8. **Eligibility for Additional Evaluation Criteria Points (Bonus Points): (Limit: 2 pages per category below)**
- a. *Bonus Criteria Validation:* In accordance with the Procurement Policy, proposers may receive bonus points in competitive solicitations by meeting the following criteria and providing the required documentation. Please note that a proposer may only pursue two of the four criteria below,

and may only receive a maximum of 10 bonus points. All documentation submitted is subject to verification by Community Power:

- i. **San Diego County Employment:** Businesses with office(s) located in San Diego County and employing at least 25% San Diego County residents will receive up to 5 additional bonus evaluation criteria points. To receive this preference, proposers must submit written information detailing the location of their office(s) in San Diego County and the percentage of San Diego County residents under their employment.
 - ii. **Disabled Veteran Business Enterprises:** Businesses certified as disabled veteran business enterprises by the Supplier Clearinghouse (thesupplierclearinghouse.com) will receive up to 5 points or 5% out of a 100-point scoring system. To receive this preference, proposers must submit proof of current, valid certification by the Supplier Clearinghouse.
 - iii. **Persons with Disabilities Business Enterprises:** Businesses certified as a Persons with Disabilities business enterprise by the Supplier Clearinghouse or Disability:IN will receive up to 5 points or 5% out of a 100-point scoring system. To receive this preference, proposers must submit proof of current, valid certification by the Supplier Clearinghouse or Disability:IN.
 - iv. **Small Business Certification:** Businesses certified as small businesses by the Department of General Services will receive up to 5 points or 5% out of a 100-point scoring system. To receive this preference, proposers must submit proof of current, valid certification by the Department of General Services.
9. **Litigation:** Proposer must complete **Attachment D**, Litigation History section, to provide litigation history for any claims filed by the proposer or against the proposer related to the provision of any services in the last five (5) years.
10. **Conflicts of Interest:** Proposer must complete **Attachment D**, Conflicts of Interest section, to identify any potential conflicts of interest with other current or former clients, including, but not limited to, Sempra Energy, San Diego Gas & Electric (SDG&E), and affiliates thereof, and how they expect to resolve those conflicts.

C. Protests

1. **Protest Contents:** A proposer may protest an agreement award if the proposer believes that the award was inconsistent with Community Power Procurement Policy or if this RFP is not in compliance with applicable law. A protest may be submitted electronically to

pspouniasflynn@sdcommunitypower.org within five (5) business days after receipt of notification of the agreement award. Any protest submitted after 5:00 PM PT of the fifth (5th) business day after notification of the agreement award will be rejected by Community Power as invalid and the proposer's failure to timely file a protest will waive the proposer's right to protest the agreement award. The proposer's protest must include supporting documentation, legal authorities in support of the grounds for the protest and the name, address and telephone number of the person representing the proposer for purposes of the protest. Any matters not set forth in the protest shall be deemed waived.

2. Community Power Review: Community Power will review and evaluate the basis of the protest provided the protest is filed in strict conformity with the foregoing. Community Power shall provide the proposer submitting the protest with a written statement concurring with or denying the protest. Action by Community Power relative to the protest will be final and not subject to appeal or reconsideration. The procedure and time limits set forth in this section are mandatory and are a proposer's sole and exclusive remedy in the event of protest. Failure to comply with these procedures will constitute a waiver of any right to further pursue the protest, including filing a government code claim or legal proceedings.

D. Submittal Requirements

1. General: Proposals must be submitted in the format identified in Section V(B) to allow Community Power to fully evaluate and compare the proposals. All requirements and questions in the RFP should be addressed and all requested information supplied. Community Power reserves the right to request additional information which, in Community Power's opinion, is necessary to assure that the proposer's competence, qualifications, number of qualified employees, business organization and financial resources are adequate to perform the Services according to the terms of the agreement.

2. Preparation: Proposals should be prepared in such a way as to provide a straightforward, concise delineation of capabilities to satisfy the requirements of this RFP. Responses should emphasize the proposer's demonstrated capability to perform work of this type. Expensive bindings and promotional materials, etc., are not necessary or desired. However, technical literature that supports the approach to providing the Services and work plan should be forwarded as part of the proposal. Emphasis should be concentrated on completeness, approach to the work, and clarity of the proposal.

3. Authorization: The proposal shall be signed by an individual, partner, officer or officers authorized to execute legal documents on behalf of the proposer.

E. Miscellaneous

1. Exceptions Certification to this RFP: In submitting a proposal in response to this RFP, proposer is certifying that it takes no exceptions to this RFP including, but not limited to, the Agreement. If any exceptions are taken, such exceptions must be clearly noted in the proposal and may be reason for rejection of the proposal. As such, proposer is directed to carefully review

the attached sample Agreement and, in particular, the insurance and indemnification provisions therein.

2. Amendments to Proposals: No amendment, addendum or modification will be accepted after a proposal has been submitted to Community Power. If a change to a proposal that has been submitted is desired, the submitted proposal must be withdrawn and the replacement proposal submitted to Community Power prior to the proposal due date and time.

3. Price Validity: Prices provided by proposers in response to this RFP are valid for 180 days from the proposal due date. Community Power intends to award the agreement within this time but may request an extension from the proposers to hold pricing, until negotiations are complete and the agreement is awarded.

4. Right to Reject Proposals: Community Power reserves the right to accept any part or all of any proposals, waive any irregularities, and to reject any and all, or parts of any and all proposals, whenever, in the sole opinion of Community Power, such action shall serve its best interests and those of ratepayers. Proposers are encouraged to submit their best prices in their proposals, and Community Power intends to negotiate only with the proposer(s) whose proposal most closely meets the requirements of this RFP. The agreement award, if any is awarded, will go to the proposer whose proposal best meets these requirements.

5. Prevailing Wages: If applicable, proposers shall be aware of the requirements of California Labor Code Sections 1720 et seq. and 1770 et seq., as well as California Code of Regulations, Title 8, Section 16000 et seq. (“Prevailing Wage Laws”), which require the payment of prevailing wage rates and the performance of other requirements on certain “public work” and “maintenance” projects. To the extent applicable, the proposer must agree to fully comply with, and to require its subcontractors/subconsultants to fully comply with, such Prevailing Wage Laws.

F. Proposal Evaluations & Criteria

Proposals will be reviewed and ranked by a selection committee composed of Community Power staff. During the evaluation process, Community Power reserves the right to request additional information or clarification for responses to this RFP. All submittals deemed responsive, on time and complete will be evaluated in accordance with the following evaluation criteria:

	Evaluation Criteria	Points Possible
1.	<p>Proposal Team’s Qualifications, Experience and Demonstration of Past Success</p> <p>a. Did the Proposer provide a responsive description of their team’s experience and qualifications to complete the Services?</p> <p>b. Are the specific roles of key personnel (and any subcontractors) right-sized to fit RFP’s needs for managing the Services?</p>	50

	c. Does the Proposal Team demonstrate sufficient experience and capability in providing the Services (years of experience, client types and sizes and clients served)? d. Does the Proposal Team have experience working with CCAs within the energy regulatory landscape?	
2.	Proposer’s approach to Program Implementation and Feasibility a. Is the proposed Scope of Work adequately detailed? Does it meet the RFP’s stated objectives, key activities, timelines and related deliverables for the project? b. Does the proposed Scope of Work align with and show collaboration to meet the services identified in RFP? c. Does the proposed Scope of Work identify the specific methods to complete the services in the RFP and are they reasonable? d. Does the proposed Scope of Work identify any subcontracted work?	35
3.	Price Proposal (Attachment A-2) a. Completion and Submittal of Attachment A-2 – Price Proposal b. Is the proposed budget for services reasonably tied to the cost associated with this work? c. Does the proposed budget include fees for all personnel likely to be engaged in completing the tasks described in the Scope of Work?	15
4.	Bonus Points/Special Preferences (optional)	Up to 10
5.	Interviews (if held)	10
	Total	100-120

1. Interviews: Following the initial evaluation, Community Power may select one proposer or select a number of proposers (with or without interviews); or conduct interviews and demos with a short list of proposers, consisting of those proposers reasonably likely, in the opinion of Community Power, to be awarded the agreement. Any interview may include discussions about services offered, conflicts of interests with other clients, or fees/compensation amount or structure. Interviews may take place through written correspondence, telephone or video conference, and/or face-to-face interviews, at Community Power’s sole discretion.

Community Power reserves the right to not convene interviews or discussions, and to make an award on the basis of initial proposals received. References may be contacted at any point in the evaluation process.

2. Negotiation and Agreement: After a proposer(s) has been selected, Community Power will negotiate an agreement for execution. The selected proposer may be asked to complete and execute a separate Non-Disclosure Agreement. If a satisfactory agreement cannot

be negotiated, Community Power may, at its sole discretion, begin agreement negotiations with the next qualified proposer who submitted a proposal, as determined by Community Power. Proposers are further notified that Community Power may disqualify any proposer with whom Community Power cannot satisfactorily negotiate an agreement.

VI. RESERVATION OF RIGHTS

This RFP is a solicitation for proposals only and is not intended as an offer to enter into a agreement or as a promise to engage in any formal competitive bidding or negotiations. Community Power may, at its sole discretion, accept or reject any or all proposals submitted in response to this RFP. In addition, Community Power may, at its sole discretion, only elect to proceed with agreement negotiations for some of the services included in the proposal. Community Power further reserves the right to cancel this RFP at any time prior to agreement award without obligation in any manner for proposal preparation, interview, fee negotiation or other marketing costs associated with this RFP. Community Power also reserves the right to waive minor errors and omissions or inconsequential disparities in proposals, or request additional information.

Community Power shall not be liable for any costs incurred by the proposer in connection with the preparation and submission of any proposal. Community Power has the right to amend the RFP, in whole or in part, by written addendum, at any time. Community Power is responsible only for that which is expressly stated in the solicitation document and any authorized written addenda. Such addendum shall be made available to each person or organization which Community Power records indicate has received this RFP. Should such addendum require additional information not previously requested, failure to address the requirements of such addendum may result in the proposal being found non-responsive and not being considered, as determined in the sole discretion of Community Power. Community Power is not responsible for and shall not be bound by any representations otherwise made by any individual acting or purporting to act on its behalf prior to an award of agreement by Community Power. Community Power has the right to reissue the RFP at a future date.

VII. CONFIDENTIALITY AND PUBLIC RECORDS

Proposals submitted in response to this RFP shall become the exclusive property of Community Power. Community Power is subject to the California Public Records Act ("CPRA"). The proposal will become a matter of public record when agreement negotiations are complete and when an agreement is executed by Community Power. Exceptions to disclosure may be available to those parts or portions of proposals that are justifiably and reasonably exempted under the CPRA, such as trade secrets. If a proposer desires to exclude a portion of its proposal from disclosure under the CPRA, the proposer must prominently mark it "Confidential" and state the specific provision in the CPRA that provides the exemption as well as the factual basis for claiming the exemption. A blanket statement of confidentiality or the marking of each page of the proposal as confidential shall not be deemed sufficient notice of a CPRA exemption. A proposer who indiscriminately and

without justification identifies most or all of its proposal as exempt from disclosure or submits a redacted copy may be deemed non-responsive.

Although the CPRA recognizes that certain confidential information or other exempt records may be protected from disclosure, Community Power is not in a position to establish that the information that a proposer submits is exempt. If a request is made for information marked "Confidential," Community Power will provide the proposer who submitted the information with reasonable notice to seek protection from disclosure by a court of competent jurisdiction.

Community Power shall not, in any way, be liable or responsible for any resulting disclosure of any such record or any parts thereof pursuant to the CPRA or otherwise by law.

VIII. CONFLICTS OF INTEREST

Community Power is governed by the Political Reform Act, Government Code Section 1090, Government Code Section 84308, and other requirements governing conflicts of interest, campaign contributions, and gifts. Proposers are required to review all applicable conflict of interest laws. In addition, Community Power has adopted policies governing procurement. Proposers are advised to review all policies, including the Procurement Policy, available at: <https://sdcommunitypower.org/resources/key-documents/>.

If it is discovered that the proposer contacted and received information through any means other than mediums used to share information about this RFP, Community Power may, in its sole discretion, disqualify the proposal from further consideration.

All contact regarding this RFP or any matter relating thereto must be in writing in accordance with the RFP Section IV, Questions and Responses.

IX. REPORTING OF SUPPLIER DIVERSITY INFORMATION

Public Utilities Code Section 366.2(m) requires certain community choice aggregators, including Community Power, to annually submit to the California Public Utility Commission ("CPUC"): (1) a detailed and verifiable plan for increasing procurement from small, local, and diverse business enterprises; and (2) a report regarding its procurement from women, minority, disabled veteran, persons with disabilities, and LGBT business enterprises.

General Order ("GO") 156, adopted by the CPUC, requires certain California public utilities to engage in outreach activities and meet specific procurement goals from women, minority, disabled veteran, persons with disabilities, and LGBT business enterprises. Qualified businesses become GO 156 certified through the CPUC and are then added to the GO 156 Supplier Clearinghouse database⁶.

⁶ www.thesupplierclearinghouse.com

To assist Community Power with its reporting obligations under Public Utilities Code Section 366.2(m) and with evaluating its supplier outreach and other activities, the successful proposer(s) awarded the agreement will be asked to voluntarily disclose their certification status with the CPUC Clearinghouse, as well as their efforts to work with diverse business enterprises, including women business enterprises (“WBEs”), minority business enterprises (“MBEs”), disabled veteran business enterprises (“DVBES”), and lesbian gay bisexual transgender business enterprises (“LGBTBES”).

Except as otherwise expressly provided under Community Power’s Procurement Policy and/or required by applicable state or federal law or funding requirements (including, without limitation, any grant or loan conditions), Community Power shall not use any demographic information received from potential vendors in any way as part of its decision-making or selection process. Rather, Community Power will use such information solely for compliance with its reporting obligations to the CPUC and evaluation of Community Power’s outreach and other activities consistent with applicable law.

X. NON-DISCRIMINATION

Community Power will not unlawfully discriminate and will require its contractors to not unlawfully discriminate on the basis of race, gender expression, gender identity, religion, national origin, ethnicity, sexual orientation, age, or disability in the solicitation, selection, hiring, or treatment of contractors, subcontractors, vendors, or suppliers. The successful proposer shall provide equal opportunity for subcontractors to participate in subcontracting opportunities.

XI. ATTACHMENTS

Attachment A – Scope of Work

Attachment A-1 – Project Schedule

Attachment A-2 – Price Proposal

Attachment B – Sample Professional Services Agreement

Attachment C – Submission Checklist (Required Form)

Attachment D – Proposer Identification (Required Form)

Attachment E – Proposer References (Required Form)

ATTACHMENT A SCOPE OF WORK

A. Program Overview

San Diego Community Power (“Community Power”) is launching the Commercial Energy Assistance Program (“CEAP”) – a continuation of the 2024 Commercial Application Assistance Pilot - to support key customers in the Commercial, Public, Agricultural, and Industrial sectors in identifying and accessing energy savings opportunities through existing utility, state, and federal funding programs. The Consultant will collaborate with Community Power’s Key Account Services Team to conduct outreach and help connect Community Power’s non-residential customer accounts to access CEAP’s services. The Consultant will assist each participant in the program with a no cost assessment of their business energy needs and steer them towards available funding opportunities.

B. CEAP Objectives

The CEAP aims to increase awareness of and access to energy efficiency and Distributed Energy Resource (“DER”) opportunities for Community Power’s large and medium non-residential customers. Through this program, Community Power seeks to:

1. Educate Commercial, Public, Agricultural, and Industrial customers about the full range of utility, state, and federal energy programs available to them.
2. Serve as a trusted resource by maintaining and sharing up-to-date information on energy efficiency, electrification, and decarbonization funding opportunities.
3. Offer hands-on support and personalized guidance to help customers understand their energy needs, explore their options, and take the next steps to upgrade equipment, improve efficiency, or apply for funding opportunities.
4. Simplify customer access to funding by reducing administrative burdens and streamlining the customer application process for incentives and programs.
5. Deliver technical assistance and project scoping support to customers, including direct help with preparing and submitting funding applications.
6. Strengthen customer relationships by offering high-value, personalized services that build trust and long-term engagement.
7. Measure impact by collecting and analyzing data on customer engagement, project outcomes, and funding success to inform future program design.

C. Program Implementation Objectives

To ensure successful delivery of the CEAP, the Consultant will perform the following:

1. Conduct proactive, respectful, and responsive outreach to eligible non-residential customers, ensuring timely follow-up and clear communication throughout the engagement process.
2. Deliver accurate, actionable energy assessments and guidance tailored to each customer’s needs, with a focus on identifying practical opportunities for energy savings and funding.
3. Assist customers navigate available energy programs and funding opportunities by reducing complexity, minimizing paperwork, and offering clear next steps.

4. Assist customers in preparing and submitting complete, competitive applications for utility, state, and federal energy programs, including gathering documentation and offering technical input.
5. Maintain the program's database of current and relevant funding opportunities, and ensure accurate tracking of customer engagement, project progress, and outcomes.
6. Collaborate closely with Community Power staff to align on messaging, share feedback, and continuously improve program delivery based on lessons learned.
7. Deliver program reporting and case studies that highlight customer outcomes, program value, and opportunities for future improvement.

Task 1: Program Management

Task 1.1: Work Plan. Consultant shall create a CEAP Work Plan for Community Power's review and approval within 45 days of contract execution, as well as provide revisions upon request. The content of the Work Plan will be used to manage the program throughout the contract period and shall include at minimum, but not limited to, the following components:

- a. A Gantt chart with program deliverables, projected outreach and participant engagement and other relevant timelines or milestones.
- b. A team organizational chart.
- c. Key implementation staff and contact information.
- d. Key Performance Indicators (KPI) for each service tier.
- e. Outline of strategies and activities that will be conducted to complete Tasks 1-5. Including challenges or risks to implementation and mitigation measures that will be taken.
- f. Definition of the process for identifying and maintaining a current list of available non-residential energy programs and grant opportunities.
- g. Definition of communication protocols for the program team.
- h. Identification of contact methods and a timeframe (e.g., 8 A.M. to 5 P.M. PST) where prospective participants can reach a single point of contact for referrals and assistance. These could include a phone number, office hours, interest form and/or other methods, and must include a dedicated email address at a minimum. The Consultant shall respond to any inquiries within three (3) business days and resolve issues or questions, in coordination with Community Power, within a reasonable and mutually agreed upon timeframe.
- i. Definition of how to escalate customer issues to Community Power staff.

Task 1.2: Kick-off Meetings. Consultant shall participate in two kick-off meetings with Community Power staff:

- a. Within two weeks of contract execution, Community Power shall schedule and lead a virtual **Contract Kickoff Meeting** to review contract administration requirements and near-term deliverables in the Project Schedule (Attachment A-1).
- b. Within 30 days of contract execution, Consultant shall coordinate and lead a **Program Launch Kickoff Meeting** to align Program vision, establish shared goals, define timelines, communication protocols, and clarify processes for iterative feedback integration between Community Power and Consultant. Consultant shall take notes, summarize meeting outcomes, action items and decisions made. The meeting will be held in-person with a virtual option for anyone unable to travel.

Task 1.3: Program Check-in Meetings. Consultant shall coordinate and facilitate meetings with Community Power staff, including preparation of meeting agendas, notes and action items. Consultant shall work with Community Power to establish the recurring meeting cadence (e.g., weekly, bi-weekly, or monthly).

- a. The Consultant shall be responsible for tracking and reporting on action item completion at these meetings.
- b. Consultant shall develop a standing agenda template for meeting consistency.

Task 1.4: Maintain Customer Energy Programs & Funding Database. Consultant shall enhance Community Power’s existing database of relevant energy programs, incentives, and funding opportunities from available energy efficiency, DER and demand response programs at the utility, state and federal level. Consultant shall use this database to guide non-residential account customers towards available energy programs and financing opportunities.

- a. Consultant shall enhance the database prior to program launch – and update quarterly, or more frequently as needed – to reflect available non-residential energy program changes and based on customer engagement and feedback.
- b. Consultant shall send a written summary of database updates to Community Power within 5 business days of completion.

Task 1.5: Monthly Invoice & Reporting. Submit monthly invoices with all associated labor and expenses (including subcontractor labor and expenses) to Community Power by the 15th of each month for previous month’s activities. Monthly invoices will be delivered in conjunction with the Monthly Report (Task 4.1).

Task 1 Deliverables

- a. CEAP Work Plan, that includes a Gantt chart, org chart, contact info, outline of strategies and activities, service-level agreements (SLAs), contact methods, response protocol, etc. and update as requested by Community Power
- b. Attendance at Contract Kickoff Meeting
- c. Coordination and facilitation of Program Kickoff Meeting
- d. Coordination and facilitation of reoccurring check-in meetings, including preparation and distribution of agendas, notes and action items
- e. Updated and maintained database of non-residential energy programs and funding opportunities at the utility, state and federal level with quarterly updates

Task 2: Program Pre-Launch

Prior to the release of the program to its intended target audience, the Consultant shall collect early customer feedback to inform program materials and build awareness through a program launch webinar or in-person meeting. Program pre-launch tasks shall include, but are not limited to, the following:

Task 2.1: Collect Initial Customer Feedback. Consultant shall collect feedback from the first two to three (2-3) customers to inform and finalize the Customer Agreement (Task 2.2) and Energy Assessment Reports templates (Task 2.3).

Task 2.2: Customer Agreement. Consultant shall develop content for Community Power staff's review and approval to be used for program participant enrollment and authorization of energy data collection. Consultant shall coordinate with Community Power Marketing and Communication staff to finalize branded design.

Task 2.3: Energy Assessment Report Templates. Consultant shall draft and maintain Energy Assessment Report templates for each service tier, incorporating feedback from Task 2.1.

Task 2.4: Launch webinar or in-person meeting. Consultant shall prepare and lead program launch webinar or in-person meeting. Consultant and Community Power shall jointly determine the format that will maximize attendance among target audiences.

Task 2 Deliverables

- a. Summary of feedback from initial 2-3 customers
- b. Responsible for Customer Agreement content and coordination with Community Power on branded design.
- c. Energy Assessment Reports templates for each tier
- d. Program launch webinar or in-person meeting and meeting materials

Task 3: Customer Engagement, Surveys and Case Studies

Under the leadership of the Key Account Services Manager, the Consultant shall coordinate with Community Power's internal marketing, communication and outreach teams to plan and conduct outreach to eligible non-residential customers and offer program services.

Task 3.1: Outreach Strategy Plan. Consultant shall develop a Program Outreach Strategy Plan and submit to Community Power for review and approval. The plan shall include, at a minimum:

- a. A description of customer engagement and direct outreach strategies to be deployed based on program eligibility criteria.
- b. A comprehensive plan presenting defined goals, targeted outreach strategies, and actionable tactics to inform specific campaigns, including projected lead generation potential and estimated deployment timelines. A list of community engagement events, developed in collaboration with Community Power, for the outreach to target audiences.
- c. Roles and responsibilities for Consultant staff, Community Power staff, and others involved in the development, approval, and deployment of branded outreach materials. A RACI chart or similar tool may be required.
- d. A statement that the strategies in the plan shall be reviewed bi-annually at a minimum and updated if program goals are at risk.

Task 3.2: Conduct Outreach. Consultant, in coordination with the Key Account Services Manager, shall:

- a. Deploy outreach strategies defined in the approved Outreach Strategy Plan (Task 3.1).
- b. Collaborate with Community Power staff to develop branded outreach materials and deploy targeted campaigns.

Task 3.3: Customer satisfaction survey. Consultant shall develop and deploy a customer satisfaction survey to collect feedback from program participants at the end of their engagement. The survey shall assess customer experience, including any barriers or challenges encountered. In addition to delivering results to Community Power quarterly, the Consultant shall summarize responses on an ongoing basis as they are received.

Task 3.4: Case studies. Consultant shall develop case study content and submit it to Community Power for approval. At least three (3) case studies shall be produced, highlighting program best practices, successes and challenges. Case studies shall be suitable for public distribution.

Task 3 Deliverables

- a. Approved Outreach Strategy Plan
- b. Summary of outreach activities conducted
- c. Customer satisfaction survey instrument and summary of results
- d. At least three (3) case studies suitable for public distribution

Task 4: Reporting

Consultant shall track and deliver program data and progress reporting as agreed upon with Community Power staff, including but not limited to:

Task 4.1: Monthly and Ad Hoc Reporting. Consultant shall provide a monthly report to accompany the monthly invoice (Task 1.5). Each report shall include, at a minimum, but not limited to:

- a. A summary of activities completed during the reporting period
- b. Identification of program issues or areas for improvement
- c. Lessons learned and suggested adjustments
- d. A summary of budget spend versus forecast

Consultant shall also provide ad-hoc reports upon request by Community Power.

Task 4.2: Program Pipeline Tracker. Consultant shall maintain a Program Pipeline Tracker to monitor customer engagement and project progress. The tracker shall include, at a minimum:

- a. Outreach activities:
 - i. Customer name & address
 - ii. Business type
 - iii. Referral method
 - iv. Date(s) of outreach attempts (e.g., emails and calls)
 - v. Summary of outcome

- b. Engagement activities:
 - i. Customer name & address
 - ii. Business type
 - iii. Customer building type
 - iv. Date of site assessment
 - v. Date of analysis report delivery
 - vi. Potential measures identified

- vii. Programs of interest
- viii. Potential program dollars identified and applied for or secured

Task 4.3: Final Report Outline & Final Report. Consultant shall provide a Final Report following the approval of a Final Report Outline by Community Power. The Final Report Outline shall include, but not be limited to:

- a. A summary of overall program results
- b. A narrative on successes and challenges
- c. Recommendations for future program strategies and tactics
- d. Additional metrics and information as identified by Community Power

Task 4 Deliverables

- a. Monthly reports including required content
- b. Ad hoc reports, as requested
- c. Program Pipeline Tracker with updated outreach and engagement data
- d. Final Report Outline and Final Report at program end

Task 5: Program Implementation. The Consultant shall deliver services across three (3) tiers of increasing engagement and complexity. Each tier builds upon the previous one—advancing from strategic opportunity identification to tailored support, and ultimately to direct application assistance for shovel-ready projects. This tiered structure enables Community Power to flexibly support a diverse range of non-residential customers, accommodating varying levels of readiness and ambition.

All customer interactions—including meetings, phone calls, and email communications—shall include Community Power’s designated point of contact.

Task 5.1: Tier 1 – Strategic Snapshot (Up to 50 customers). Consultant shall provide high-level energy insight and opportunity scoping tailored to each customer’s needs. The purpose is to deliver clear, strategic recommendations to help customers understand their options and prepare for next steps.

- a. Conduct customer interviews and site visits to identify recent equipment upgrades and operational practices, in addition to a desktop assessment of the property’s energy usage patterns (i.e., benchmarking).
- b. Deliver an Energy Assessment Report that includes:
 - i. A summary of customer initiatives and energy goals.
 - ii. Identification of opportunities for Energy Efficiency (“EE”), load flexibility, emerging technology, and/or DER investment.
 - iii. Overview of current operations and energy usage
 - iv. Summary of recent energy upgrades
 - v. Recommendations for cost-effective energy improvements and behavioral changes
 - vi. Information on available energy programs and funding opportunities
 - vii. Eligibility criteria and application timelines
 - viii. Recommendations for Tier 2 or follow-up engagements
- c. Schedule and lead a debrief call with customer to review the report and discuss low- or no-cost actions and next steps.

Deliverables for Tier 1 (Task 5.1)

- a. Energy Assessment Report
- b. Customer debrief call & summary

Task 5.2: Tier 2 – Energy Program Application Support (Up to 25 customers). Consultant shall assist customers with energy program enrollment and application processes based on Tier 1 recommendations.

- a. Provide desktop application support
- b. Assist with completing applications and gathering required documentation
- c. Offer technical guidance on eligible equipment and upgrade feasibility
- d. Identify potential contractors for customer outreach
- e. Schedule and lead an initial call to kick off application support, with follow-up calls as needed

Deliverables for Tier 2 (Task 5.2)

- a. Completed application support documentation.
- b. Summary of customer meetings and application progress

Task 5.3: Tier 3 - Deep Support for Competitive Applications (Up to 10 customers). Consultant shall provide hands-on support for complex grant and funding applications, including full application development and submission guidance.

- a. **Project Framing & Scoping Document**
 - i. High-level project concept and objectives
 - ii. Draft scope of work or technical approach
 - iii. Alignment with the funding opportunity's goals
- b. **Application Package**
 - i. Narrative responses
 - ii. Data summaries (e.g., energy savings estimates)
 - iii. Budget and cost estimates with justification
 - iv. Required forms and attachments (e.g., letters of support, site maps)
 - v. As needed customization based on specific program requirements
- c. **Document Review & Refinement Memos**
 - i. Tracked changes and suggestions for improvement
 - ii. Edits based on customer and reviewer feedback
- d. **Submission Support Checklist**
 - i. Required components and completion status
 - ii. Internal deadlines and submission method
- e. **Application Submission Confirmation**
 - i. Copy of the final submission or confirmation email
 - ii. Summary of submission details

- f. Post-Submission Support Summary (as needed)**
 - i. Guidance for follow-up, site visits, or reviewer questions)
 - ii. Recommendations for tracking status and next steps

Deliverables for Tier 3 (Task 5.3)

- a. Complete application package
- b. Submission checklist and confirmation
- c. Post submission support summary (if applicable)

**ATTACHMENT A-2
PRICE PROPOSAL**

Instructions: Proposers to provide titles of classifications and hourly rates anticipated to provide the services mentioned in Attachment A. Additionally, Proposers are to list any direct expenses and optional services required to complete the work mentioned in Attachment A.

Table 1.0. Labor Rate Schedule

Title	Estimated Hours	Hourly Rate (\$)

Table 1.1. Direct Expenses

Description	Unit Cost (\$)

Table 1.2. Optional Services

Description	Fixed Rate (\$)

Table 1.3.

Task No.	Description	Total Cost (\$)
1	Program Management	
2	Program Pre-Launch	
3	Customer Engagement, Surveys and Case Studies	
4	Reporting	
5	Program Implementation	
	Year 1 Total:	
	Year 2 Total:	
	Year 3 Total:	
	Grand Total Years 1-3 (Inclusive of any costs mentioned in Table 1.1, Table 1.2, Table 1.3):	

ATTACHMENT B
SAMPLE PROFESSIONAL SERVICES AGREEMENT

Community Power's Sample Professional Services Agreement will be posted on Community Power's solicitations website (<https://sdcommunitypower.org/resources/solicitations/>) under the announcement for this RFP in PDF form.

**ATTACHMENT C
SUBMISSION CHECKLIST**

A. Submission Checklist

Instructions: Proposer’s submittal must include the following items (submitted in the order below) as one combined PDF document (per category):

<input type="checkbox"/>	Table of Contents
<input type="checkbox"/>	Cover Letter – Limit: 2 pages
<input type="checkbox"/>	Experience & Qualifications Narrative – Limit 3 pages
<input type="checkbox"/>	Proposed Approach Narrative – Limit 5 pages
<input type="checkbox"/>	Price Proposal – Attachment A-2 (complete)
<input type="checkbox"/>	Resumes & Professional Certifications – Limit 1 pages per team member
<input type="checkbox"/>	Applicable Engagements or References – Limit 1 page per applicable engagement or reference
<input type="checkbox"/>	Eligibility for Bonus Points – Limit 2 pages per bonus category
<input type="checkbox"/>	Attachments A-1, A-2, C, D, & E – Completed forms

B. Proposal Submission

Proposals should be submitted electronically to Community Power as a single PDF document using the online Proposal Submission Form as follows:

[RFP 26-002 - Proposal Submission Form](#)

Proposals are **due on April 29, 2026 at 2:00PM (Pacific Time)**.

**ATTACHMENT D
PROPOSER IDENTIFICATION**

Legal Business Name	
Parent Company Name (if any)	
Business Address	
Business type:	<input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Limited Liability Corporation <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Other: _____
California Business License Number	
Proposal Point of Contact	Name: Title: Address: Phone: Email:
Authorized Signatory	Name: Title: Email:
Litigation History Provide litigation history for any claims filed by the Proposer or against the Proposer related to the provision of any services in the last five (5) years.	
Conflicts of Interest Proposer must identify any potential conflicts of interest with other current or former clients, including, but not limited to, Sempra Energy, San Diego Gas & Electric (SDG&E), and affiliates thereof, and how they expect to resolve those conflicts.	

**ATTACHMENT E
PROSPECTIVE PROPOSER REFERENCES**

Proposer's Name: _____

List three (3) References where the same or similar scope of services were provided in order to meet the Minimum Requirements stated in this solicitation.

1	Entity Name	Address	Type of Service
	Project Title / Contract No	# of Years / Contract Term	Dollar Amount
	Contact Person	Phone	Email
2	Entity Name	Address	Type of Service
	Project Title / Contract No	# of Years / Contract Term	Dollar Amount
	Contact Person	Phone	Email
3	Entity Name	Address	Type of Service
	Project Title / Contract No	# of Years / Contract Term	Dollar Amount
	Contact Person	Phone	Email