



**REQUEST FOR PROPOSALS (RFP)
FOR
SCHEDULING COORDINATOR SERVICES**

1. OBJECTIVE

Clean Power Alliance of Southern California (“CPA”) is seeking proposals (“Proposals”) from qualified and experienced contractors (individually, a “Proposer” and collectively, “Proposers”) to provide scheduling coordinator (“SC”) Services.

2. PROJECT BACKGROUND

CPA is a Community Choice Aggregator (“CCA”) program, established as a Joint Powers Authority, made up of 35 local agencies across Los Angeles and Ventura Counties (CPA’s member agencies are set forth in Attachment C). These agencies have banded together to provide cleaner electricity at competitive rates, offering a choice of electricity service providers to approximately three million residents and businesses through approximately one million customer accounts in Southern California. CPA will expand to serve 38 communities in the fall of 2025.

Procurement Portfolio

CPA currently contracts for SC services using a third-party provider. CPA does not own any generating assets and is not expected to own any within the term of these services. CPA offers retail electricity service to its customers, with approx. 11,600 gigawatt hours (“GWh”) of annual load and procures fixed priced energy, resource adequacy, carbon free energy, and renewable energy to meet its compliance and customer demand obligations.

CPA currently has approximately 135 Inter-SC Trades (“IST”) contracts and conducts monthly solicitations for fixed price energy hedges. Each monthly solicitation results in four (4) to five (5) new contracts.

CPA has executed the following long-term power purchase agreements:

Resource Type	Size by Scheduling Coordinator	
	CPA	Seller
Wind – Online	-	321.6 MW
Hydro – Online	11.95 MW	20.09 MW
Geothermal - Online	-	64 MW
Solar – Online	1318.5 MW	40 MW
Standalone Battery – Online	240 MW	-

Co/Tri-Located Battery - Online	824.5 MW	-
Wind – Contracted not Online	-	575 MW
Geothermal – Contracted not Online	48 MW	50 MW
Solar – Contracted not Online	58 MW	-
Standalone Battery – Contracted not Online	798 MW	-
Co/Tri-Located Battery – Contracted not Online	46 MW	-

CPA annually reevaluates its portfolio and could potentially procure additional long-term renewable/storage contracts with online dates within the term of these services.

3. QUALIFICATIONS AND EXPERIENCE

A qualified Proposer should have the following minimum qualifications and experience:

- Proposers must be certified by the California Independent System Operator (“CAISO”) as a scheduling coordinator and must have experience with providing SC services for load-serving entities (“LSEs”) with loads greater than 1,000 GWh annually in CAISO.
- Proposers must have experience providing SC services for generating assets, including intermittent renewable and standalone, co-located, and tri-located energy storage resources.
- Proposers must have experience with onboarding standalone and co-located energy storage resources through the CAISO New Resource Implementation (“NRI”) process.
- Proposers must have experience validating and monitoring CAISO outages for standalone and co-located energy storage resources.

4. SCOPE OF SERVICES

4.1. Scope of Work

A detailed description of the Scope of Work for the SC Services is contained in Attachment A (“Scope of Services”).

4.2. Term of Work

Services under this RFP are expected to commence on October 1, 2025, and continue until December 31, 2029 (“Initial Term”). At the end of the Initial Term, the Parties may renew this Agreement for two successive one (1) year terms for a maximum of two additional years (each, a “Renewal Term”).

5. PRICING

5.1. Proposer must (a) describe in detail the compensation structure to meet the Scope of Services specified in **Attachment A**; (b) describe in detail any fees or charges for travel, telephone calls, and any other expenses anticipated to be incurred, which shall be separately billed (NOTE: any compensation for such fees or expenses shall be at-cost, i.e., no margin, or additional fees shall be charged); and (c) describe in detail any discounts or downward adjustments that are available and the conditions for such discounts. The compensation structure can include (i) fixed price or (ii) hourly rates, in which case the Proposer must specify the rate increments for each professional who will or is anticipated to perform services outlined herein, and a not-to-exceed amount.

5.1.1. The cost of the transition services set forth in Attachment A Task #1, subsection 4.2 shall not exceed \$50,000.

5.2. Proposer may, at its option, submit one (1) alternative pricing proposal but that proposal must specify any additional amounts proposed and justify in detail the cost breakdown for each individual scope item described in Attachment A, or by another divisible increment. CPA reserves the right, at its sole discretion, to reject or accept any alternative pricing proposal.

5.3. Proposer(s) should provide a pricing matrix that follows the format set forth in the table below:

Services	Initial Term (\$/yr)	Renewal Term 1 (\$/yr)	Renewal Term 2 (\$/yr)
Task #1 SC Services			
SCME Services in Task #1 (\$/resource id)			
Transition/ Setup Cost (if required)	Up to \$50,000	N/A	N/A
Task #2 CRR Services			
Task #3 subsection 1 Credit Risk Management			
Task #3 subsection 2 Risk Management			
Task #4 Load Forecasting			
Task #5 Energy Storage Optimization Software			

6. RFP PROCESS

6.1. RFP Schedule

The timetable for this RFP is as follows:

Description	Date
Release of RFP	March 12, 2025
Deadline for Written Questions	March 20, 2025
Responses to Questions Provided	March 27, 2025
RFP Proposals Due	April 23, 2025 (by 4:00 p.m. Pacific Time)
Evaluation of Proposals	April 24 - May 9, 2025
Interviews (if needed)	May 12-23, 2025
Notice of Intent to Award Contract Provided	May 27, 2025
Contract Negotiations	May 27 – June 20, 2025
Last Day to Submit Notice of Intent to Protest	June 24, 2025
Last Day to Protest	June 27, 2025
CPA Response to Protest	July 3, 2025
Anticipated Presentation to the Board for Approval and Execution of Contract	July 10, 2025
Anticipated Commencement of Work	October 1, 2025

6.2. Proposer Questions and CPA Responses

Potential proposers may submit questions regarding this RFP by sending an email to contracting@cleanpoweralliance.org with a copy to cchan@cleanpoweralliance.org. All questions must be received by 4:00pm (Pacific Time) on March 20, 2025. When submitting questions, please specify which section of the RFP you are referencing and quote the language that prompted the question. CPA will post responses to all of the questions received for this solicitation to CPA's website at: <https://cleanpoweralliance.org/contracting-opportunities/> on March 27, 2025.

If a proposer has questions about the RFP Solicitation process, including any instructions or requirements, the Proposer must raise these questions through this Questions and Response process. Any failure by a Proposer to raise any concern relating to the solicitation process or requirements through this Questions and Responses process, shall be deemed a waiver of the Proposer's right to protest any decision for contract award relating to any aspect of the RFP Solicitation's process, or requirement.

CPA reserves the right to group similar questions when providing answers. Questions may address issues or concerns that the evaluation criteria and/or business requirements would unfairly disadvantage providers or, due to unclear instructions, may result in CPA not receiving the best possible responses from provider.

6.3. Proposal Submission Deadline

A proposal should be submitted by email to contracting@cleanpoweralliance.org by 4:00 pm on April 23, 2025. Please include "PROPOSAL FOR SCHEDULING COORDINATOR SERVICES" in the email subject line.

It is the sole responsibility of the submitting Proposer to ensure that its proposal is received before the submission deadline. Submitting 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.

6.4. Proposal Evaluation Criteria

Proposals will be evaluated in accordance with the following evaluation criteria:

Evaluation Criteria	Criteria Weight
Proposer's qualifications and experience, including references (see Section 3).	40%
Proposer's ability to provide the Contemplated Scope of Services identified in Attachment A .	40%
Proposer's pricing, excluding the transition services set forth in Section 5.1.1 (see Section 5).	20%

6.5. Evaluation Process

CPA will evaluate the Proposals pursuant to the criteria specified in Section 6.4 above. CPA may select one Proposer or select a combination of Proposers (with or without interviews); or conduct interviews with a "short list" of Proposers, consisting of those Proposers reasonably likely, in the opinion of CPA, to be awarded the contract. 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 CPA's sole discretion. CPA reserves the right, at its sole discretion, to request a 'best and final offer' ("BAFO") after it evaluates the proposals and to re-evaluate or re-score based on the BAFO or interviews (if any).

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

After a Proposer has been selected, CPA will negotiate a contract for execution. If a satisfactory contract cannot be negotiated, CPA may, at its sole discretion, begin contract negotiations with the next qualified Proposer who submitted a Proposal, as determined by CPA, or cancel all or part the RFP. Proposers are further notified that CPA may disqualify any Proposer with whom CPA cannot satisfactorily negotiate a contract. A contract may be presented to CPA's Board of Directors for approval.

6.6. Protest Process

Any Proposer who wishes to submit a written protest must notify CPA by no later than June 24, 2025, by no later than 5:00 p.m. (Pacific Time) of its intent to protest the award. The notice of intent to protest must be e-mailed to contracting@cleanpoweralliance.org. Any failure to submit an intent to protest constitutes a waiver of Proposer's right to submit a written protest.

If a notice of intent to protest has been timely submitted, then a full and complete written protest must be submitted by no later than 9:00 a.m. (Pacific Time) on June 27, 2025, unless this date is further amended through an Addendum. Any written protest must contain a full and complete statement specifying in detail the grounds of the protest and the facts in support thereof. The written protest must be e-mailed to contracting@cleanpoweralliance.org.

If CPA's Board of Directors ("Board") is the final approval authority for any contract(s) awarded from this RFP, you may also give a public comment when the item is scheduled before the Board. If you want to give a public comment, please contact CPA's Board Clerk prior to the meeting at clerk@cleanpoweralliance.org.

7. PROPOSAL REQUIREMENTS

7.1. Proposals shall include the following components:

- 7.1.1. Proposer's qualifications and experience with the elements specified in Section 3 (Qualifications and Experience). Proposer must provide qualifications for all team members, including the principal, company official(s), and other personnel who Proposer anticipates will be assigned to work on behalf of CPA. This requirement includes, but is not limited to, Proposer's anticipated subcontractors or teaming partners.

- 7.1.2. Proposer's explanation for how it plans to meet Task and Deliverables specified in Attachment A (which will be attached as the scope of work to the final agreement as Exhibit A). This section must include:
- 7.1.2.1. A list of the Proposer's planned project team, who will be assigned to work on behalf of CPA, and an explanation for each project team member's role and responsibility.
 - 7.1.2.2. A list of subcontractors, if any, and their respective roles and responsibilities separated by task.
 - 7.1.2.3. Proposer must provide its pricing proposal, including the information required in Section 5, "Pricing," above. Proposer should describe any fixed fees or hourly billing rates, fees, or other compensation that Proposer may seek from CPA for services, inclusive of staff time, equipment, materials, travel, administrative/clerical, overhead and other out-of-pocket expenses, if applicable to this contract.
 - 7.1.2.4. If a teaming arrangement is being proposed, teaming partner or subcontractor costs should be broken out separately.
- 7.1.3. Proposer's completed pricing matrix as set forth in Section 5.3.
- 7.1.4. Proposer's completed Prospective Contractor References Form. See **Attachment B**.
- 7.1.5. Any required changes to CPA's Pro Forma Contract. See **Attachment D**.
- 7.1.5.1. **Please Note:** CPA may terminate the Task #2, #3, #4 or #5 Services in whole, or from time to time in part, whenever CPA determines that termination is in CPA's best interests. Such termination, in whole, or in part, shall take effect by CPA delivering to the selected Proposer, at least ninety (90) calendar days prior to the end of the calendar year, a Notice of Termination specifying the extent to which performance of the Services under the Agreement is terminated.
- 7.1.6. Proposer's completed Campaign Contribution Form. See **Attachment E**.

8. RESERVATION OF RIGHTS

This RFP is a solicitation for proposals only and is not intended as an offer to enter into a contract or as a promise to engage in any formal competitive bidding or negotiations. CPA may, at its sole discretion, accept or reject any or all proposals submitted in response to this RFP. CPA also may, in its sole discretion, make no award for this RFP or cancel this RFP in its entirety. In addition, CPA may, at its sole discretion, only elect to

proceed with contract negotiations for some of the services included in the proposal. CPA further reserves its right to waive minor errors and omissions in proposals, request additional information or revisions to offers, and to negotiate with any or all Proposers.

CPA shall not be liable for any costs incurred by the Proposer in connection with the preparation and submission of any proposal. CPA reserves the right to waive inconsequential disparities in a submitted proposal. CPA has the right to amend the RFP, in whole or in part, by written addendum, at any time. CPA 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 CPA 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 CPA. CPA may issue an addendum, at any time, and based on its sole discretion. CPA 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. CPA has the right to reissue the RFP at a future date.

9. CONFIDENTIALITY AND PUBLIC RECORDS

Responses to this RFP shall become the exclusive property of CPA. CPA is subject to the California Public Records Act ("CPRA"). The recommended Proposer's proposal will become a matter of public record when contract negotiations are complete and when an agreement is executed by CPA. Exceptions to disclosure may be available to those parts or portions of proposals that are justifiably and reasonably defined as business or trade secrets, and plainly marked by the Proposer as "Trade Secret", "Confidential", or "Proprietary". CPA shall not, in any way, be liable or responsible for the disclosure of any such record or any parts thereof, if disclosure is required or permitted under the CPRA or otherwise by law.

In the event CPA receives a CPRA request for any of the aforementioned documents, information, books, records, and/or contents of a proposal marked "Confidential", "Trade Secrets", or "Proprietary", Proposer agrees to defend and indemnify CPA from all costs and expenses, including reasonable attorneys' fees, incurred in connection with any action, proceedings, or liability arising in connection with the CPRA request.

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, and 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.

10. CONFLICTS OF INTEREST

CPA is governed by the Political Reform Act, Government Code Section 1090, Government Code Section 84308, and other requirements governing conflicts, campaign contributions, and gifts. Proposers are required to review all applicable conflict of interest laws. In addition, CPA has adopted policies governing bidder conduct. Proposers are advised to review all policies, including the Vendor Communication Policy available here: <https://cleanpoweralliance.org/public-documents/administrative-documents/>.

You may not contact or receive information outside of this RFP process. If it is discovered that the Proposer contacted and received information from anyone other than the email address specified above and under the process specified herein regarding this solicitation, CPA may, in its sole discretion, disqualify your proposal from further consideration.

All contact regarding this RFP or any matter relating thereto must be in writing and may be emailed to contracting@cleanpoweralliance.org with a copy to cchan@cleanpoweralliance.org.

ATTACHMENTS

Attachment A – Scope of Services

Attachment B – Prospective Contractor References

Attachment C – CPA Member Agencies

Attachment D – CPA Sample Contract

Attachment E – Campaign Contribution Form (Government Code 84308)

ATTACHMENT A
SCOPE OF SERVICES

The principal responsibility of the selected Proposer(s) is to provide a full range of scheduling coordinator (“SC”) services that include, but are not limited to, the following:

Task #1: Scheduling Coordinator Services

The selected Proposer shall act as CPA’s SC for the CAISO market, providing bill-to-bill services that include, but are not limited to, the following:

1. SC Services.
 - 1.1. 24/7 day ahead and real time operations. Provide seven (7) day, twenty-four (24) hour day-ahead (“DA”) and real-time (“RT”) monitoring, bidding, and outage management with the CAISO for CPA’s scheduling coordinator ID (“SCID”).
 - 1.2. Submit demand bids to the CAISO markets. The selected Proposer will submit demand bids to the CAISO to meet CPA’s forecasted load requirements and instructions. The selected Proposer will have the ability to schedule a CPA provided, or a CPA authorized third-party provided load forecast. The selected Proposer system will have the ability to receive the forecast automatically via an application programming interface (“API”) and through manual intervention via a mutually agreed upon method. The selected Proposer will have a process to validate accurate submittals into the CAISO market.
 - 1.2.1. Proposers should describe the requirements of bidding in forecasted load from a CPA provided or CPA authorized third-party provided forecast. If the selected Proposer is contracted to provide a load forecast (see Task #2 below) this includes describing what an override of its forecast will require, what audits and controls are in place to prevent unauthorized overrides, and any timing requirements to submit the bids to the CAISO on time.
 - 1.3. Resource operations in CAISO. The selected Proposer will manage new resource onboarding, scheduling, and settlement activities necessary to integrate CPA’s contract resources into the CAISO markets. Contracted resources include contracts with power suppliers, generators, storage facilities, and/or demand response or other aggregated or virtual resources. This includes coordinating with the resource owner and coordinating with CPA to complete CAISO onboarding of resources through CAISO’s New Resource Implementation (“NRI”) process, coordinating directly with resource operators for the submittal of unit outages to CAISO, and resolving real-time issues between the resource operations and CAISO.

- 1.4. Submit supply schedules. The selected Proposer will submit Inter-SC Trades (“ISTs”), import schedules, prepare North American Electric Reliability Corporation (“NERC”) e-Tags, and manage the e-Tags as needed due to transmission constraints or outages from delivery to sink.
 - 1.5. Submit supply bids to the CAISO markets (both economic and self-schedule). The selected Proposer will submit economic and self-schedule bids into the CAISO markets in accordance with CPA’s bidding strategies. This includes monitoring resource, market, weather, and pricing conditions and rebidding standalone, co-located, and tri-located energy storage to align with bidding strategies. The selected Proposer will have the ability to receive bid overrides automatically via API and through manual inputs via a mutually agreed upon method. The selected Proposer will have a process to validate accurate submittals into the CAISO market.
 - 1.5.1. Proposers should describe the requirements of automated and manual bid overrides. This includes describing what an override will require, what audits and controls are in place to prevent unauthorized overrides, and any timing requirements to get the bids submitted to CAISO on time.
 - 1.5.2. Proposers should describe their experience and capabilities in energy storage resource bidding and operations in the CAISO market, including standalone, co-located and tri-located energy storage assets.
 - 1.6. CAISO settlement validation and disputes. The selected Proposer will validate all CAISO invoices, including performing CAISO shadow settlements, and provide daily shadow settlement calculations for discrepancy and dispute analysis. Weekly and monthly validation reports detailing CAISO charges and credits by applicable charge codes and recommendations for disputes will be provided. Should CPA elect to dispute a CAISO invoice amount, the selected Proposer will file a dispute with CAISO pursuant to the CAISO Tariff and take further appeals or actions as needed. The selected Proposer will also ensure timely and accurate submission of meter data to CAISO, as required.
 - 1.6.1. Proposers should describe their CAISO settlement validation process and types of CAISO disputes they’ve identified.
 - 1.7. SC Meter Entity (“SCME”) services. The selected Proposer will monitor, validate, and submit select resource’s settlement quality meter data timely to CAISO daily.
 - 1.8. CAISO market changes. The selected Proposer will monitor CAISO market changes and inform CPA about CAISO’s impacts on the provider and the wholesale market. The selected Proposer will update its systems and processes as needed to implement the CAISO market changes before the market changes have gone live in CAISO’s production environment
2. Deal Capture Services.
 - 2.1. Deal Capture. The selected Proposer will record all executed contracts for all product types (e.g., energy, Portfolio Content Category (PCC1, PCC2,

PCC3), carbon free, resource adequacy) into their system of record within two (2) business days of receipt. The selected Proposer must have processes to ensure accurate deal entry and support CPA staff in verifying contracts in the system as requested. The selected Proposer must also grant CPA access to the contract information and transaction data through an API, a user interface and daily report in an agreed upon format.

3. Reporting and Data Services.

3.1. Storing and retrieving data: The selected Proposer must be capable of parsing and storing large volumes of data. All CAISO data, CPA contract data and related supplier data, and any other data utilized for CPA services must be available for CPA to retrieve on demand via API or by accessing a backend database.

3.1.1. Proposers should describe the types of data being pulled into their systems and how customers currently access the data.

3.2. CAISO market and asset reporting. The selected Proposer will provide regular reporting (daily, weekly, and monthly) on the performance and availability of CPA's resource portfolio and CAISO market activity, including hourly day ahead and real time load and generation volumes and prices, settlement validation reports, monthly charge/credit reports, and market performance. The selected Proposer must be capable of delivering on-demand custom reports to be used for resource monitoring and settlement purposes.

3.3. Compliance reporting. The selected Proposer will provide E-Tag summary data for California Air Resources Board Mandatory Reporting Regulations ("CARB MRR") Annual Reports and other compliance reports. The selected Proposer must be capable of delivering on-demand custom reports for other compliance reporting requirements.

4. Miscellaneous Services.

4.1. Business resiliency. The selected Proposer will develop processes and protocols consistent with CPA's resiliency plan to ensure critical operations are maintained during emergency events. This includes documented disaster recovery plans, backup systems, and cybersecurity compliance.

4.2. Transition period. If applicable, the selected Proposer will perform any start-up SC functions during the Transition Period from CPA's previous SC service provider. The selected Proposer will have an environment for CPA to perform user acceptance testing ("UAT") at least forty-five (45) days before the SC cutover date. The selected Proposer will prepare a detailed work plan describing all activities and deliverables, including milestone dates and data or process requirements for CPA.

4.2.1. Proposers should describe how long a transition period would be, what would be required for a successful transition, and any lessons learned from previous transitions.

- 4.3. Performance metrics and service level agreements (“SLAs”). The selected Proposer will define clear SLAs for response times, accuracy, and availability, including 99.9% system uptime. The selected Proposer will implement key performance indicators (“KPIs”) to measure the quality of services, such as load forecast accuracy percentages, data entry accuracy percentages, issue resolution rates, timeliness of reporting, and any additional KPIs requested by CPA for monitoring. The selected Proposer will notify CPA of changes in systems or reports that may impact services at least thirty (30) days before implementation. CPA reserves the right to terminate services with thirty (30) days’ notice for unsatisfactory performance after a performance improvement plan.
- 4.4. Data security and continuity. The selected Proposer must ensure compliance with CAISO, California Public Utilities Commission (“CPUC”), Federal Energy Regulatory Commission (“FERC”), and other state and federal regulations for secure storage, handling, and transmission of sensitive data, including maintaining robust cybersecurity and disaster recovery plans.

Task #1 Anticipated Deliverables:

1. Business resiliency, cybersecurity, and disaster recovery plans set forth in subsections 4.1 and 4.4 above, completed and shared with CPA.
2. Completion of systems setup to provide all Services set forth in Task #1.
3. Completion of UAT to demonstrate that CPA’s portfolio has been set up correctly as set forth in subsections 1 and 2 above.
4. Completion of UAT for all manual overrides and uploads listed in Task #1, as set forth in subsections 1.2 and 1.5 above.
5. Completion of setup for CPA reports and retrieval of data via API as set forth in subsection 3 above.
6. Completion of transition period activities as set forth in subsection 4 above.

Timeline for Task #1:

1. Business resiliency, cybersecurity, and disaster recovery plans completed and shared with CPA by October 31, 2025.
2. Completion of systems setup activities by November 26, 2025.
3. Completion of portfolio setup UAT by December 19, 2025.
4. Completion of UAT for all manual overrides and uploads listed in Task #1 by December 19, 2025.
5. Completion of setup for CPA reports and retrieval of data via API by December 23, 2025.
6. Completion of transition period activities by December 30, 2025.

Task #2: Congestion Revenue Rights (“CRR”) Services

The selected Proposer shall provide CRR services, including, but not limited to:

1. CRR Bid Strategy Development and Implementation.
 - 1.1. The selected Proposer will manage the annual and monthly CRR nomination and auction processes on behalf of CPA. The selected Proposer will consult with CPA to select CRRs to nominate and to participate in buying and selling CRR auction transactions to achieve hedging goals. Proposers may propose services to recommend CRR nominations and auction strategy, congestion forecasting methodologies, models and/or resources used to make these recommendations. Proposers must demonstrate proficiency in working with CAISO's Full Network Model and update timeline to produce accurate congestion forecasts. The selected Proposer will prepare and submit CPA's CRR nominations, offers, and bids. Results of CRR analysis performed will be made available to CPA in a mutually agreeable format, supported by market analysis.
 - 1.1.1. Proposers should provide a description of their CRR analytical tools as part of their Proposal.
2. CRR Portfolio Performance.
 - 2.1. The selected Proposer will deliver monthly reports and presentations on CPA's CRR portfolio performance, including CRR revenue forecasts. The provider will also provide graphical interfaces or on-demand reports for transaction monitoring. The provider will review all settlement statements and invoices associated with CRRs for accuracy and ensure CRR credit requirements are met. The selected Proposer will review and provide input on CPA's CRR Risk Management Policy upon request.

Task #2 Anticipated Deliverables:

1. Monthly allocation processes data sheets for nomination preparation according to strategy.
2. Monthly auction process data sheets for offer and bid preparation according to strategy.
3. Annual allocation processes data sheets for nomination preparation according to strategy.
4. Annual auction process data sheets for offer and bid preparation according to strategy.
5. Monthly and annual nomination submission service.
6. Auction offers and bids submission service.

Timeline for Task #2:

1. Monthly allocation processes data sheets delivered two (2) days prior to Tier 1 submission date (for Tier 1) or the business day immediately following the publication of Tier 1 allocation results (for Tier 2).
2. Monthly auction process data sheets delivered the business day immediately following the publication of Tier 2 allocation results.

3. Annual allocation processes data sheets delivered two (2) weeks prior to Tier 1 submission date (for Tier 1 and Tier 2), two (2) business days following the publication of Tier 1 allocation results (for Tier 2 update), two (2) business days following the publication of Tier 2 allocation results (for Tier 3).
4. Annual auction process data sheets delivered two (2) business days immediately following the publication of Tier 3 allocation results.
5. Monthly and annual nomination submission services provided on a monthly basis on the business days on which nominations are due for both monthly and annual processes.
6. Auction offers and bids submission services provided on a monthly basis on the business days on which auction bids and offers are due for both monthly and annual processes.

Task #3: Risk Management Services

The selected Proposer shall provide risk management services, including, but not limited to, the following:

1. Credit Risk Management.
 - 1.1. The selected Proposer will monitor and report CPA's counterparty credit exposure, monitor and report changes in the creditworthiness of CPA credit counterparties, provide credit limit recommendations consistent with CPA's credit protocols, and provide recommendations for credit and payment terms at the transaction and counterparty level.
2. Risk Management.
 - 2.1. The selected Proposer shall support scenario and stochastic analysis, consistent with CPA's Energy Risk Management Policy, including, but not limited to, the following services:
 - 2.1.1. Portfolio risk assessment. Conduct risk exposure analysis and quantify potential financial impacts under various market conditions, including price volatility, load uncertainty, and regulatory changes.
 - 2.1.2. Scenario and stress testing. Perform forward-looking scenario analysis incorporating price shocks, load variability and supply disruptions.
 - 2.1.3. Value-at-risk ("VaR") and tail risk metrics. Implement quantitative risk measures such as Monte Carlo simulations, VaR, and conditional VaR ("CVaR") to assess portfolio exposure under extreme conditions.
 - 2.1.4. Hedging strategy support. Evaluate the effectiveness of CPA's existing hedging strategy, recommend optimal hedge ratios and adjustments based on risk tolerance and market conditions.
 - 2.1.5. Counterparty credit and collateral monitoring. Support the development of risk-adjusted credit exposure tracking, including counterparty default probability analysis.

- 2.1.6. Regulatory and compliance risk management. Provide insights into regulatory changes that may impact CPA's energy procurement and risk management approach.
- 2.1.7. Automated risk dashboards and reports. Deliver periodic risk reports with actionable insights, including daily monitoring tools for portfolio exposure and risk positions.
- 2.1.8. Data quality assurance. Access to API tools to allow tie-out between CPA ETRM and Proposer internal systems.

Task #3 Anticipated Deliverables:

1. Risk dashboard that can be accessed by CPA staff to see daily or weekly summaries of positions, counter party credit risk and mark to market exposure, and profit/loss changes and market activity.
2. Monthly risk reports. Comprehensive monthly reports detailing market trends, grid behavior and congestion, portfolio exposures, optimal hedge ratios, and key risk metrics (e.g., VaR, stress test results, hedge effectiveness).
3. Quarterly scenario analysis. Stochastic simulations and sensitivity analysis with risk mitigation recommendations.
4. On-demand risk advisory support. Ad-hoc risk analysis and strategy consultations as requested by CPA.

Timeline for Task #3:

1. Dashboard should be loaded with legacy transaction data and fully accessible by December 31, 2025.
2. Monthly risk reports delivered by the fifth business day of each month.
3. Quarterly scenario analysis delivered by the tenth business day following quarter-end.

Task #4: Load Forecasting Services

The selected Proposer shall provide load forecasting services, including, but not limited to, the following:

1. Daily forecast of CPA hourly loads.
 - 1.1. Each business day, the selected Proposer will generate an hourly weather-adjusted fourteen (14) day load forecast using historic consumption data for CPA, which may be refreshed throughout the day upon request.
 - 1.2. The selected Proposer shall coordinate with CPA's in-house load forecaster to develop the forecast and make available the data inputs.
 - 1.3. The load forecast represents expected aggregate energy consumption at each load aggregation point where CPA submits daily demand bids.
 - 1.4. The load forecast shall reflect weather forecasts from a minimum of three (3) weather stations in Los Angeles and Ventura counties.

- 1.5. Note that CPA does not have access to real-time supervisory contract and data acquisition (“SCADA”) data and the provider will be required to use its preferred combination of estimated settlement quality meter data (“ESQMD”, T+8), actual settlement quality meter data (“ASQMD”, T+48) and aggregated historical usage data (“HUD”) for communities who recently joined CPA, or will join CPA in the future, to develop its forecasts.
- 1.6. The selected Proposer will provide weekly forecast error reports, including explanations and corrective actions for significant forecast deviations.
2. Proposers should describe their load forecasting methodology.
3. Proposers should describe their process and experience integrating forecasts from their customer or third-party vendors. This includes describing how data coordination between vendors happens and any timing constraints the Proposer has.

Task #4 Anticipated Deliverables:

1. Daily forecast of CPA hourly loads.
2. Weekly forecast error report.

Timeline for Task #4:

1. Forecast of CPA hourly loads provided daily over the duration of the Services.
2. Forecast error report provided weekly over the duration of the Services.

Task #5: Energy Storage Optimization Software Services

The selected Proposer shall provide energy storage optimization software services. Proposers should provide a detailed explanation of the software’s capabilities, including, but not limited to, the following:

1. Compliance-aware bidding. The ability to ensure required resource adequacy (“RA”) volumes are consistently bid while optimizing for market conditions.
2. Outage-aware adjustments. Direct integration with CAISO’s Outage Management System (“OMS”) to incorporate real-time operating limitations into bid strategies.
3. Market research and adaptability. Dedicated resources for monitoring CAISO market reforms and updating bidding strategies accordingly.
4. Price forecasting and tiered bidding. The capability to forecast day-ahead market (“DAM”), fifteen-minute market (“FMM”), real-time market (“RTM”), and ancillary services (“AS”) prices, constructing tiered bid curves that align with CPA’s risk and revenue strategies.
5. User interface and override capabilities. A platform where CPA can review bids, view predicted schedules, and, if needed, submit alternative bid strategies or overrides.
6. Risk and strategy customization. The ability to define risk parameters or bidding strategies within the software to align with CPA’s portfolio objectives.

- 6.1. Proposers should describe their experience optimizing and bidding standalone, co-located, and tri-located storage resources in CAISO markets, as well as their approach to integrating with SCs. This should include:
 - 6.1.1. The software's ability to interface with SC platforms.
 - 6.1.2. The process for bid submission and any timing constraints.
 - 6.1.3. How the data coordination occurs between the Proposer, CPA, and third-party vendors.

Task #5 Anticipated Deliverables:

1. Storage operations and bidding monitoring dashboard.
2. Storage bidding manual override interface.
3. Storage awards and net revenues interval-level reporting data.

Timeline for Task #5:

1. Storage operations and bidding monitoring dashboard completed by December 30, 2025.
2. Storage bidding manual override interface completed by December 30, 2025.
3. Storage awards and net revenues interval-level reporting data delivered by December 30, 2025.

ATTACHMENT B
PROSPECTIVE CONTRACTOR REFERENCES

Contractor'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. Name of Firm	Address of	Contact	Telephone # ()	Fax ()
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.
2. Name of Firm	Address of	Contact	Telephone # ()	Fax ()
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.
3. Name of Firm	Address of	Contact	Telephone # ()	Fax ()
Name or Contract No.	# of Years / Term of Contract		Type of Service	Dollar Amt.

ATTACHMENT C
LIST OF CPA MEMBER AGENCIES

County/City
1. Agoura Hills
2. Alhambra
3. Arcadia
4. Beverly Hills
5. Calabasas
6. Camarillo
7. Carson
8. Claremont
9. Culver City
10. Downey
11. Hawaiian Gardens
12. Hawthorne
13. Hermosa Beach
14. LA County
15. Malibu
16. Manhattan Beach
17. Monrovia
18. Moorpark
19. Ojai
20. Oxnard
21. Paramount
22. Redondo Beach
23. Rolling Hills Estates
24. Santa Monica
25. Santa Paula
26. Sierra Madre
27. Simi Valley
28. South Pasadena
29. Temple City
30. Thousand Oaks
31. Ventura City
32. Ventura County
33. West Hollywood
34. Westlake Village
35. Whittier

ATTACHMENT D
SAMPLE CONTRACT

Attached is a sample CPA Agreement that will be negotiated between the CPA and the selected Proposer. Additional terms and conditions will be incorporated dependent on circumstances, including scope of services, the space selected, any tenant improvement or allowance, and other factors.

Clean Power Alliance of Southern California

This Professional Services Agreement (this "Agreement"), dated and effective as of [DATE] (the "Effective Date"), is made by and between:

CLEAN POWER ALLIANCE OF SOUTHERN CALIFORNIA ("CPA"), and
[Legal Name of Contractor]. ("Contractor").

CPA and Contractor are sometimes collectively referred to herein as the "Parties" and each individually as a "Party." In consideration of the terms of this Agreement, and for other good and valuable consideration, the Parties make the following acknowledgments and agreements:

RECITALS

WHEREAS, CPA may contract with a provider for scheduling coordinator services;

WHEREAS, CPA conducted a Request for Proposals ("RFP") and CPA selected Contractor because Contractor has the expertise and experience to provide the specified services to CPA and offered CPA the Best Value;

WHEREAS, Contractor desires to provide these specified services to CPA;

WHEREAS, the purpose of this Agreement is to set forth the terms and conditions upon which Contractor shall provide services to CPA;

NOW, THEREFORE, it is agreed based on the consideration set forth below by the Parties to this Agreement as follows:

AGREEMENT

1. Definitions

- a. The definition of "Confidential Information" is set forth in paragraph 10.b. of this Agreement.
- b. "CPA Data" shall mean all data gathered or created by Contractor in the performance of the Services pursuant to this Agreement, including any customer or customer-related data.
- c. "CPA Information" shall mean all confidential, proprietary, or sensitive information provided by CPA to Contractor in connection with this Agreement.

- d. "CPA Materials" shall mean all finished or unfinished content, writing and design materials but not limited to messaging, design, personalization, or other materials, reports, plans, studies, documents and other writings prepared by Contractor, its officers, employees and agents for CPA for the performance of, the purpose of, or in the course of implementing this Agreement.
- e. "CPA Product" includes collectively CPA Data, CPA Information, and CPA Materials.
- f. "Services" shall mean the scope of work Contractor provides to CPA as specified in Exhibit A.

2. Exhibits and Attachments

The following exhibits and attachments are attached to this Agreement and incorporated into this Agreement by this reference:

Exhibit A – Scope of Work

Exhibit B – [Contractor's Workplan and Schedule] [Reserved] [Include Exhibit B if services include implementation, deliverables, phases/stages, or the work is complex]

Exhibit C – Compensation [This is the description of the contractor's compensation]

Exhibit D – [Reserved] [Optional: Attach Contractor's bid response, e.g., proposal, statement of qualifications, or other material that describes Contractor's commitment]

Should a conflict arise between language in the body of this Agreement and any exhibit or attachment to this Agreement, the language in the body of this Agreement controls, followed by Exhibit A, B, C, and D in that order.

3. Services to be Performed by Contractor

In consideration of the payments set forth in this Agreement and in Exhibit C, Contractor shall perform services for CPA in accordance with the terms, conditions, and specifications set forth in this Agreement and in [Exhibits A and B] ("Services").

4. Compensation

CPA agrees to compensate Contractor as specified in Exhibit C:

- a. In consideration of the Services provided by Contractor in accordance with all terms, conditions and specifications set forth in this Agreement and Exhibit A [and Exhibit B], CPA shall make payment to Contractor on a [time and materials, not-to-exceed, or fixed fee] basis and in the manner specified in Exhibit C.
- b. Unless otherwise indicated in Exhibit C, Contractor shall invoice CPA monthly to accountspayable@cleanpoweralliance.org for all compensation related to Services performed during the previous month. Payments shall be due within fifteen (15) calendar days after the date the invoice is submitted to CPA at the specified email address. All payments must be made in U.S. dollars.

5. Term

Subject to compliance with all terms and conditions of this Agreement, the term of this

Agreement shall be three (3) years from the Effective Date ("Initial Term"). At the end of the Initial Term, the Parties may renew this Agreement for two successive one (1) year terms for a maximum of two additional years (each, a "Renewal Term"), unless either Party provides ninety (90) days prior written notice of its intent not to renew the term of the Agreement ("Renewal Notice").

6. Termination

- a. Termination for Convenience. CPA may terminate the Agreement in accordance with this paragraph in whole, or from time to time in part, whenever CPA determines that termination is in CPA's best interests. A termination for convenience, in part or in whole, shall take effect by CPA delivering to Contractor, at least ninety (90) calendar days prior to the effective date of the termination or prior to a Notice of Termination specifying the extent to which performance of the Services under the Agreement is terminated.

If the termination for convenience is partial, Contractor may submit to CPA a request in writing for equitable adjustment of price or prices specified in the Agreement relating to the portion of this Agreement which is not terminated. CPA may, but shall not be required to, agree on any such equitable adjustment. Nothing contained herein shall limit the right of CPA and Contractor to agree upon amount or amounts to be paid to Contractor for completing the continued portion of the Agreement when the Agreement does not contain an established price for the continued portion. Nothing contained herein shall limit CPA's rights and remedies at law.

- b. Termination for Default. If Contractor fails to provide in any manner the Services required under this Agreement, otherwise fails to comply with the terms of this Agreement, or violates any ordinance, regulation or law which applies to its performance herein and such default continues uncured for thirty (30) calendar days after written notice is given to Contractor, CPA may terminate this Agreement by giving five (5) business days' written notice. If Contractor requires more than thirty (30) calendar days to cure, then CPA may, at its sole discretion, authorize additional time as may reasonably be required to effect such cure provided that Contractor diligently and continuously pursues such cure.
- c. Termination for Lack of Third-Party Funding. CPA may terminate this Agreement if funding for this Agreement is reduced or eliminated by a third-party funding source.
- d. Effect of Termination. Upon the effective date of expiration or termination of this Agreement: (i) Contractor may immediately cease providing Services in its entirety or if a termination to a part of the Agreement, cease providing the Services that have been terminated; (ii) any and all payment obligations of CPA under this Agreement will become due immediately except any equitable adjustment pursuant to Paragraph 5(a); (iii) promptly transfer title and deliver to CPA all CPA Product or any work in progress pursuant to this Agreement; and (iv) each Party will promptly either return or destroy (as directed by the other Party) all Confidential Information of the other Party in its possession as well as any other materials or information of the other Party in its possession.

Upon such expiration or termination, and upon request of CPA, Contractor shall reasonably cooperate with CPA to ensure a prompt and efficient transfer of all data,

documents and other materials to CPA in a manner such as to minimize the impact of expiration or termination on CPA's customers.

7. Contract Materials

CPA owns all right, title and interest in and to all CPA Materials and CPA Data. Upon the expiration of this Agreement, or in the event of termination, CPA Materials and all CPA Information, in whatever form and in any state of completion, shall remain the property of CPA and shall be promptly returned to CPA. Upon termination, Contractor may make and retain a copy of such CPA Materials if required by law or pursuant to the Contractor's reasonable document retention or destruction policies.

8. Payments of Permits/Licenses

Contractor bears responsibility to obtain any license, permit, or approval required for it to provide the Services to be performed under this Agreement at Contractor's own expense prior to commencement of the Services.

9. No Recourse against Constituent Members

CPA is organized as a Joint Powers Authority in accordance with the Joint Exercise of Powers Act of the State of California (Government Code Section 6500, et seq.) pursuant to the Joint Powers Agreement and is a public entity separate from its constituent members. CPA shall solely be responsible for all debts, obligations and liabilities accruing and arising out of this Agreement. Contractor shall have no rights and shall not make any claims, take any actions or assert any remedies against any of CPA's constituent members in connection with this Agreement.

10. Confidential Information

- a. Duty to Maintain Confidentiality. Contractor agrees that Contractor will hold all Confidential Information in confidence, and will not divulge, disclose, or directly or indirectly use, copy, digest, or summarize, any Confidential Information unless necessary to comply with any applicable law, regulation, or in connection with any court or regulatory proceeding applicable in which case, any disclosure shall be subject to this paragraph, 10.c., and 10.d., below.
- b. Definition of "Confidential Information". The following constitutes "Confidential Information," whether oral or written: (a) the terms and conditions of, and proposals and negotiations related to, this Agreement, (b) information, in whatever form, that CPA shares with Contractor in the course and scope of this Agreement, or (c) information that either Contractor stamps or otherwise identifies as "confidential" or "proprietary" before disclosing it to the other.
- c. Confidential Information shall not include: (1) information that is generally available to the public or in the public domain at the time of disclosure; (2) information that becomes publicly known other than through any breach of this Agreement by Contractor or its Representatives; (3) information which is subsequently lawfully and in good faith obtained by Contractor or its Representatives from a third party, as shown by documentation sufficient to establish the third party as the source of the Confidential Information; provided

that the disclosure of such information by such third party is not known by Contractor or its Representatives to be in breach of a confidentiality agreement or other similar obligation of confidentiality; (4) information that Contractor or its Representatives develop independently without use of or reference to Confidential Information provided by Contractor; or (5) information that is approved for release in writing by Contractor.

- d. California Public Records Act. The Parties acknowledge and agree that the Agreement including but not limited to any communication or information exchanged between the Parties, any deliverable, or work product are subject to the requirements of the California Public Records Act (Government Code Section 6250 et seq.). In order to designate information as confidential, the Disclosing Party must clearly stamp and identify the specific portion of the material designated with the word "Confidential." The Parties agree not to over-designate material as Confidential Information. Over-designation includes stamping whole agreements, entire pages or series of pages as "Confidential" that clearly contain information that is not Confidential Information.
- e. Third Party Request for Confidential Information. Upon request or demand of any third person or entity not a Party hereto pursuant to the California Public Records Act for production, inspection and/or copying of Confidential Information ("Requested Confidential Information"), CPA will as soon as practical notify Contractor in writing via email that such request has been made. CPA will be solely responsible for taking at its sole expense whatever legal steps are necessary to prevent release to the third party of the Confidential Information designated by Contractor. If Contractor takes no such action after receiving the foregoing notice from CPA, CPA shall, at its discretion, be permitted to comply with the third party's request or demand and is not required to defend against it. If Contractor does take or attempt to take such action, Contractor agrees to indemnify and hold harmless CPA, its officers, directors, employees and agents ("CPA Indemnified Parties"), from any claims, liability, award of attorneys' fees, or damages, and to defend any action, claim or lawsuit brought against any of CPA Indemnified Parties for Contractor's attempt to prevent disclosure or CPA's refusal to disclose any Confidential Information.

11. Insurance

All required insurance coverages shall be substantiated with a certificate of insurance and must be signed by the insurer or its representative evidencing such insurance to CPA within 10 business days after the Agreement is fully executed. The general liability policy shall be endorsed naming Clean Power Alliance of Southern California and its employees, officers and agents as additional insureds. The certificate(s) of insurance and required endorsement shall be furnished to CPA prior to commencement of work and maintained throughout the Term and any Renewal Term. Each certificate shall provide for thirty (30) days advance written notice to CPA of any cancellation or reduction in coverage. Said policies shall remain in force through the life of this Agreement and shall be payable on a per occurrence basis only, except those required by paragraph (d) below which may be provided on a claims-made basis consistent with the criteria noted therein.

Nothing herein shall be construed as a limitation on Contractor's obligation under paragraph 12 of this Agreement to indemnify, defend, and hold CPA harmless from any

and all liabilities arising from the Contractor's negligence, recklessness or willful misconduct in the performance of this Agreement. CPA agrees to timely notify the Contractor of any negligence claim.

Failure to provide and maintain the insurance required by this Agreement will constitute a material breach of the Agreement. In addition to any other available remedies, CPA may suspend payment to the Contractor for any services provided during any time that insurance was not in effect and until such time as the Contractor provides adequate evidence that Contractor has obtained the required coverage.

a. General Liability

The Contractor shall maintain a commercial general liability insurance policy in an amount of no less than one million (\$1,000,000.00) with a two million dollar (\$2,000,000.00) aggregate limit. CPA shall be named as an additional insured on the commercial general liability policy and the Certificate of Insurance shall include an additional endorsement page.

b. Auto Liability

Where the services to be provided under this Agreement involve or require the use of any type of vehicle by Contractor in order to perform said services, Contractor shall also provide comprehensive business or commercial automobile liability coverage including non-owned and hired automobile liability in the amount of one million dollars combined single limit (\$1,000,000.00).

c. Workers' Compensation

The Contractor acknowledges the State of California requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of the Labor Code. If Contractor has employees, a copy of the certificate evidencing such insurance or a copy of the Certificate of Consent to Self-Insure shall be provided to CPA prior to commencement of work.

d. Professional Liability Insurance

Coverages required by this paragraph may be provided on a claims-made basis with a "Retroactive Date" either prior to the date of the Agreement or the beginning of the contract work. If the policy is on a claims-made basis, coverage must extend to a minimum of twelve (12) months beyond completion of contract work. If coverage is cancelled or non-renewed, and not replaced with another claims made policy form with a "retroactive date" prior to the Agreement effective date, the Contractor must purchase "extended reporting" coverage for a minimum of twelve (12) months after completion of contract work. Contractor shall maintain a policy limit of not less than \$1,000,000.00 per incident. If the deductible or self-insured retention amount exceeds \$100,000.00, CPA may ask for evidence that Contractor has segregated amounts in a special insurance reserve fund or Contractor's general insurance reserves are adequate to provide the necessary coverage and CPA may conclusively rely thereon.

Contractor shall be responsible for initiating, maintaining and supervising all safety precautions and programs in connection with the performance of the Agreement.

Contractor shall monitor the safety of the job site(s) during the project to comply with all applicable federal, state, and local laws, and to follow safe work practices.

12. Indemnification

Contractor agrees to indemnify, defend, and hold harmless CPA, its employees, officers, and agents, from and against, and shall assume full responsibility for payment of all wages, state or federal payroll, social security, income or self-employment taxes, with respect to Contractor's performance of this Agreement. Contractor further agrees to indemnify, and hold harmless CPA from and against any and all third-party claims, liabilities, penalties, forfeitures, suits, costs and expenses incident thereto (including costs of defense, settlement, and reasonable attorney's fees), which CPA may hereafter incur, become responsible for, or pay out, as a result of death or bodily injuries to any person, destruction or physical damage to tangible property, or any violation of governmental laws, regulations or orders, to the extent caused by Contractor's negligent acts, errors or omissions, or the negligent acts, errors or omissions of Contractor's employees, agents, or subcontractors while in the performance of the terms and conditions of the Agreement, except for such loss or damage arising from the sole negligence or willful misconduct of CPA, elected and appointed officers, employees, agents and volunteers.

13. Independent Contractor

- a. Contractor acknowledges that Contractor, its officers, employees, or agents will not be deemed to be an employee of CPA for any purpose whatsoever, including, but not limited to: (i) eligibility for inclusion in any retirement or pension plan that may be provided to employees of Contractor; (ii) sick pay; (iii) paid non-working holidays; (iv) paid vacations or personal leave days; (v) participation in any plan or program offering life, accident, or health insurance for employees of Contractor; (vi) participation in any medical reimbursement plan; or (vii) any other fringe benefit plan that may be provided for employees of Contractor.
- b. Contractor declares that Contractor will comply with all federal, state, and local laws regarding registrations, authorizations, reports, business permits, and licenses that may be required to carry out the work to be performed under this Agreement. Contractor agrees to provide CPA with copies of any registrations or filings made in connection with the work to be performed under this Agreement.

14. Compliance with Applicable Laws

Contractor shall comply with any and all applicable federal, state and local laws and resolutions affecting Services covered by this Agreement.

15. Nondiscriminatory Employment

Contractor and/or any permitted subcontractor, shall not unlawfully discriminate against any individual based on race, color, religion, nationality, sex, sexual orientation, age, protected veteran status, or condition of disability. Contractor and/or any permitted subcontractor understands and agrees that Contractor and/or any permitted subcontractor is bound by and will comply with the nondiscrimination mandates of all federal, state and local statutes, regulations and ordinances.

16. Work Product.

All finished and unfinished reports, plans, studies, documents and other writings prepared by and for Contractor, its officers, employees and agents in the course of implementing this Agreement shall become the sole property of CPA upon payment to Contractor for such work. CPA shall have the exclusive right to use such materials in its sole discretion without further compensation to Contractor or to any other party. Contractor shall, at CPA's expense, provide such reports, plans, studies, documents and writings to CPA or any party CPA may designate, upon written request. Contractor may keep file reference copies of all documents prepared for CPA.

17. Notices

Any notice, request, demand, or other communication required or permitted under this Agreement shall be deemed to be properly given when **both**: (1) transmitted via email to the email address listed below; and (2) sent to the physical address listed below by either being deposited in the United States mail, postage prepaid, or deposited for overnight delivery, charges prepaid, with an established overnight courier that provides a tracking number showing confirmation of receipt.

In the case of CPA, to:

Name/Title: Theodore Bardacke, Chief Executive Officer
Address: 801 S. Grand Ave., Suite 400, Los Angeles, CA 90017
Telephone: (213) 376-4850
Email: tbardacke@cleanpoweralliance.org

In the case of Contractor, to:

Name/Title: [Name, Title]
Address: [Address]
Telephone: [Phone]
Email: [Email]

18. Assignment

Neither this Agreement nor any of the Parties' rights or obligations hereunder may be transferred or assigned without the prior written consent of the other Party. Subject to the preceding sentence, this Agreement shall be binding upon and inure to the benefit of the Parties and their respective successors and permitted assigns.

19. Subcontracting

Contractor may not subcontract Services to be performed under this Agreement without the prior written consent of CPA. If the CPA's written consent to a subcontract is not obtained, Contractor acknowledges and agrees that CPA will not be responsible for any fees or expenses claimed by such subcontractor.

20. Retention of Records and Audit Provision

Contractor and any subcontractors authorized by the terms of this Agreement shall keep and maintain on a current basis full and complete documentation and accounting records, employees' time sheets, and correspondence pertaining to this Agreement. Such records shall include, but not be limited to, documents supporting all income and all expenditures. CPA shall have the right, during regular business hours, to review and audit all records relating to this Agreement during the Agreement period and for at least five (5) years from the date of the completion or termination of this Agreement. Any review or audit may be conducted on Contractor's premises, or, at CPA's option, Contractor shall provide all records within a maximum of fifteen (15) days upon receipt of written notice from CPA. Contractor shall refund any monies erroneously charged. Contractor shall have an opportunity to review and respond to or refute any report or summary of audit findings and shall promptly refund any overpayments made by CPA based on undisputed audit findings.

21. Conflict of Interest

- a. No CPA employee whose position with the CPA enables such employee to influence the award of this Agreement or any competing Agreement, and no spouse or economic dependent of such employee, shall be employed in any capacity by the contractor or have any other direct or indirect financial interest in this Agreement. No officer or employee of the Contractor who may financially benefit from the performance of work hereunder shall in any way participate in the CPA's approval, or ongoing evaluation, of such work, or in any way attempt to unlawfully influence the CPA's approval or ongoing evaluation of such work.
- b. Contractor shall comply with all conflict of interest laws, ordinances, and regulations now in effect or hereafter to be enacted during the term of this Agreement. The Contractor warrants that it is not now aware of any facts that create a conflict of interest. If the Contractor hereafter becomes aware of any facts that might reasonably be expected to create a conflict of interest, it shall immediately make full written disclosure of such facts to CPA. Full written disclosure shall include, but is not limited to, identification of all persons implicated and a complete description of all relevant circumstances. Failure to comply with the provisions of this paragraph shall be a material breach of this Agreement.

22. Publicity

Contractor shall not issue a press release or any public statement regarding the Agreement, Services contemplated by this Agreement, or any other related transaction unless CPA has agreed in writing the contents of any such public statement.

23. Governing Law, Jurisdiction, and Venue

This Agreement shall be governed by, and construed in accordance with, the laws of the State of California. The Contractor agrees and consents to the exclusive jurisdiction of the courts of the State of California for all purposes regarding this Agreement and further agrees and consents that venue of any action brought hereunder shall be exclusively in the County of Los Angeles.

24. Amendments

None of the terms and conditions of this Agreement may be changed, waived, modified or varied in any manner whatsoever unless in writing duly signed by the Parties.

25. Severability

Should any provision of this Agreement be held invalid or unenforceable by a court of competent jurisdiction, such invalidity will not invalidate the whole of this Agreement, but rather, the remainder of the Agreement which can be given effect without the invalid provisions, will continue in full force and effect and will in no way be impaired or invalidated.

26. Complete Agreement

This Agreement constitutes the entire Agreement between the parties. No modification or amendment shall be valid unless made in writing and signed by each party. Failure of either party to enforce any provision or provisions of this Agreement will not waive any enforcement of any continuing breach of the same provision or provisions or any breach of any provision or provisions of this Agreement.

27. Counterparts

This Agreement may be executed in one or more counterparts, including facsimile(s), emails, or electronic signatures, each of which shall be deemed an original and all of which together will constitute one and the same instrument

IN WITNESS WHEREOF, the parties have executed this Agreement on the date first above written.

[Signature Page Follows]

ATTACHMENT E

CAMPAIGN CONTRIBUTION DISCLOSURE FORM

Government Code Section 84308

In accordance with California law, bidders and contracting parties are required to disclose, at the time a proposal is submitted or pre-qualified provider receives a Task Order solicitation, information relating to any campaign contributions made to Clean Power Alliance of Southern California’s (CPA) Regular or Alternate Directors, including: the name of the party making the contribution (which includes any parent, subsidiary or otherwise related business entity, as defined below), the amount of the contribution, and the date the contribution was made. 2 Cal. Code of Regs. (C.C.R.) §18438.8(b).

California law prohibits a party, participant, or an agent, from making campaign contributions to a CPA Director of more than \$250 while their contract is pending before the CPA Board; and **further prohibits a campaign contribution from being made for three (3) months following the date of the final decision by the CPA Board.** Gov’t Code §84308(d).

For purposes of reaching the \$250 limit, the campaign contributions of the bidder or contractor plus contributions by its parents, affiliates, and related companies of the contractor or bidder are added together. 2 C.C.R. §18438.5.

In addition, a CPA Director must abstain from voting on a contract or permit if they have received a campaign contribution from a party or participant to the proceeding, or agent, totaling more than \$250 in the 12-month period prior to the consideration of the item by the CPA Board. Gov’t Code §84308(c).

The names of the Regular and Alternate Directors and their member agency is attached hereto as Attachment 1.

* * * * *

Every bidder or contractor must disclose as follows:

Section 1

Bidder/Contractor (Legal Name)_____.

List any parent, subsidiaries, or otherwise affiliated business entities of Contractor (See definitions in 2 C.C.R.. §18703.1(d)):

*Attach additional pages, if necessary

Section 2

Has Contractor or Bidder (identified in Section 1) and/or any parent, subsidiary, or affiliated company, or agent thereof, made a campaign contribution(s) totaling \$250 or more in the aggregate to a Director of CPA's Board in the 12 months preceding the date of execution of this disclosure?

Yes

No

If YES, proceed to Section 3 and complete. Then, sign and date under Section 4. If NO, proceed to Section 4.

Section 3

Regular/Alternate Director	Amount of Contribution	Date of Contribution

*Attach additional pages, if necessary

Section 4

I, _____, [print name] am authorized to sign this disclosure on behalf of the Contractor/Bidder identified in Section 1. I acknowledge and understand Government Code Section 84308 requirements. I declare the foregoing disclosures to be true and correct.

TITLE: _____

SIGNATURE: _____

DISCLOSURE DATE: _____

The following individuals listed are elected officials who serve on Clean Power Alliance's Board of Directors as either Regular or Alternate Directors. Non-elected alternate directors are not included, unless they are campaigning for elected office.

REGULAR DIRECTORS

Member Agency	Regular Directors	Title
1. Agoura Hills	Deborah Klein Lopez	Councilmember
2. Alhambra	Jeff Maloney	Councilmember
3. Arcadia	Michael Cao	Councilmember
4. Beverly Hills	Julian Gold	Councilmember
5. Calabasas	David Shapiro	Councilmember
6. Camarillo	Susan Santangelo	Councilmember
7. Carson	Cedric Hicks	Councilmember
8. Claremont	Corey Calaycay	Councilmember
9. Culver City	Albert Vera	Mayor
10. Downey	Mario Trujillo	Councilmember
11. Hawaiian Gardens	Maria Teresa Del Rio	Councilmember
12. Hawthorne	Alex Monteiro	Councilmember
13. Hermosa Beach	Justin Massey	Councilmember
14. Los Angeles County	Lindsey Horvath	Supervisor, 3 rd District
15. Malibu	Marianne Riggins	Councilmember
16. Manhattan Beach	Amy Howorth	Councilmember
17. Monrovia	Tamala Kelly	Councilmember
18. Moorpark	Renee Delgado	Councilmember
19. Ojai	Betsy Six	Mayor
20. Oxnard	Bert Perello	Councilmember
21. Paramount	Vilma Cuellar Stallings	Councilmember
22. Redondo Beach	Paige Kaluderovic	
23. Rolling Hills Estates	Debby Stegura	Councilmember
24. Santa Monica	Gleam Davis	Councilmember
25. Santa Paula	Jenny Crosswhite	Councilmember
26. Sierra Madre	Robert Parkhurst	Councilmember
27. Simi Valley	Rocky Rhodes	Councilmember
28. South Pasadena	Jon Primuth	Councilmember
29. Temple City	Fernando Vizcarra	Councilmember
30. Thousand Oaks	David Newman	Councilmember
31. City of Ventura	Liz Campos	Councilmember
32. Ventura County	Vianey Lopez	Supervisor, 5 th District
33. West Hollywood	John Erickson	Councilmember
34. Westlake Village	Ned Davis	Councilmember
35. Whittier	Fernando Dutra	Councilmember

ALTERNATE DIRECTOR(S)

County/City	Alternate Director(s)	Title
1. Agoura Hills	Illece Buckley Weber	Councilmember
2. Alhambra	Sasha Renee Perez	Councilmember
3. Arcadia		
4. Beverly Hills	VACANT	
5. Calabasas	Ed Albrecht	Councilmember
6. Camarillo	Martita Martinez-Bravo Tony Trembley	Councilmember Councilmember
7. Carson	Jim Dear	Councilmember
8. Claremont	Jennifer Stark	Councilmember
9. Culver City	Yasmine-Imani McMorrin	Councilmember
10. Downey	Tim Horn	Councilmember
11. Hawaiian Gardens		
12. Hawthorne		
13. Hermosa Beach		
14. Los Angeles County		
15. Malibu	Steve Uhring	Councilmember
16. Manhattan Beach	David Lesser	Councilmember
17. Monrovia		
18. Moorpark		
19. Ojai		
20. Oxnard		
21. Paramount	Isabel Aguayo	Councilmember
22. Redondo Beach	Todd Lowenstein	Councilmember
23. Rolling Hills Estates	Frank Zerunyan	Councilmember
24. Santa Monica		
25. Santa Paula		
26. Sierra Madre		
27. Simi Valley	Fred Thomas	Councilmember
28. South Pasadena		
29. Temple City	William Man Tom Chavez	Councilmember
30. Thousand Oaks		
31. City of Ventura	Mike Johnson	Councilmember
32. Ventura County	Janice Parvin	Supervisor, 4 th District
33. West Hollywood	Chelsea Byers	Councilmember
34. Westlake Village	Susan McSweeney	Councilmember
35. Whittier	Octavio Martinez	Councilmember