



westlight energy

***WestLight Energy 2026 RFP for Scheduling Coordinator
and Optimization Services***

Application Form Questions – COPY ONLY

Please apply using [this form](#)

Deadline for applications:

August 21, 2026, 5:00 PM PPT

INTRODUCTION

Please use [this form](#) to submit a proposal in response to the WestLight Energy RFP for the following services:

Service 1: Scheduling Coordinator Agent

Service 2: Variable Energy Resource (VER) Optimization

Service 3: Battery Energy Storage System (BESS) Optimization

Service 4: Co-Located and Hybrid Solar/BESS Optimization.

Google Account Required: [This form](#) requires sign-in to a Google Account to upload attachments and save or edit a response. A Gmail address is not required; respondents may use a Google Account associated with their existing business email address.

Proposals may be submitted to Friday, Aug 21, 2026, at 5:00 PM PPT. All proposals must be submitted through this form. Proposals received by WestLight Energy (WestLight) after this deadline may not be considered.

This form is automatically collecting emails from all respondents.

QUESTIONS FOR ALL RESPONDENTS

SECTION 1: COMPANY INFORMATION

Respondent's Company Information

Legal Business Name

Include name for "doing business as" in parentheses if applicable.

Principal Business Address

California Business Address (if different or applicable)

Legal Form of Organization

- Corporation
- Limited Liability Company
- Partnership
- Limited Partnership
- Sole Proprietorship
- Joint Venture
- Other _____

State of formation

Provide country if outside the USA.

Year of formation

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Briefly describe your organization, its principal energy-market services, and the year it began providing those services

Primary Contact Information

Name

Title

Email

Phone number

SECTION 2: QUALIFICATIONS AND EXPERIENCE

Respondent's Qualifications and Experience

Describe your entity's experience serving California CCAs, public power entities, or similarly situated load-serving entities.

Please identify the services performed, approximate portfolio scope, and years served.

If applicable, please identify every affiliate or subcontractor that would perform any proposed service.

Please provide a separate response for each service, including the following details:

- Service performed;
- Operating location;
- Division of responsibilities;
- Oversight arrangement; and
- Approximate percentage of work.

List professional licenses, industry certifications, security certifications, or organizational memberships directly relevant to the proposed services.

Please explain the relevance of each and indicate whether it is held by your entity's business, staff, and/or subcontractor who would be providing services to WestLight.

Respondent's Staffing Information

Describe your entity's organizational and account-governance structure.

Please identify the proposed executive sponsor, account manager, service leads, and escalation contacts.

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Total FTEs engaged in CAISO-related activities

Total FTEs engaged in scheduling or real-time operations

Total FTEs engaged in settlements and reporting

Total FTEs engaged in analytics and optimization

State the number of FTEs that would be assigned to WestLight and distinguish dedicated personnel from shared personnel.

Please provide a separate response for each proposed service and identify any overlap.

SECTION 3: COORDINATION OF SERVICES

WestLight Energy intends to evaluate the responses to each service requested in this RFP individually, which may result in the contracting of services from multiple contractors, who will be required to coordinate their work in delivering services to WestLight.

This section is intended to inform WestLight about your entity's capability to provide multiple services alone, and/or to provide one or more services in coordination with another third-party vendor.

Please indicate whether your entity is proposing to provide services as:

Please select all applicable responses. For example, please select all three responses if your entity is willing to provide services in any of the three capacities.

- ☐ **SC Agent** - Standalone Service
- ☐ **SC Agent** - Service combined with one or more Optimization Services
- ☐ **Optimization Service** - Standalone Service

Describe how your entity would coordinate its proposed service(s) with other contractors, including:

- Staffing;
 - Systems;
 - Data flows;
 - Decision rights;
 - Escalation; and
 - Safeguards against conflicts between SC Agent, optimization, and settlement responsibilities.
-

SECTION 4: FINANCIAL HEALTH AND STABILITY

Is the Respondent owned or controlled by another entity?

Yes / No

CONDITIONAL QUESTION: Provide the legal name of the Parent or Controlling Entity and briefly describe the ownership relationship.

CONDITIONAL QUESTION: Upload a high-level organizational chart showing the Respondent, any parent or controlling entity, material affiliates, and the business unit that would provide the proposed services.

Does the Respondent or any parent company have a current public credit rating (or held one since 2021)?

Yes / No

CONDITIONAL QUESTION: For each Legal Entity and each Rating Agency from which the Respondent or any parent company received a rating since 2021, please provide:

- Rating Legal Entity;
 - Rating Agency;
 - Rating Date;
 - Current Status;
 - (Active/Withdrawn/No longer rated);
 - Outlook or Watch Status; and
 - Public link, if applicable.
-

Has the Respondent or any parent entity experienced any of the events listed below since 2021?

- Bankruptcy, insolvency, receivership or similar proceedings;
- Going-concern qualification in an independent auditor's report;
- Material adverse change in financial condition;
- Default under a material financing or contractual obligation;
- Material ownership, merger, acquisition, or restructuring event;
- Suspension, debarment, or restriction from government contracting;
- Contract termination for default or material nonperformance; and/or
- Another equivalent event.

CONDITIONAL QUESTION: Describe each event, including the date, status, financial or operational significance, corrective action, and current resolution.

Has the Respondent, any parent entity, or any affiliate proposed to perform services been subject to a material claim, investigation, enforcement action, judgment, or regulatory violation relevant to the proposed services since 2021?

Yes / No

CONDITIONAL QUESTION: Identify the nature of the matter, including details of the responsible authority or claimant, date, latest status, potential or final financial exposure, and corrective action.

Please do not disclose information prohibited by law or court order.

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If shortlisted, will the Respondent and any parent entity provide its two most recent fiscal years of audited financial statements, including the following?

- Independent auditor's report;
- Balance sheet;
- Income statement;
- Cash-flow statement; and
- Notes to the financial statements.

Yes / No

CONDITIONAL QUESTION: Identify the legal entity whose financial statements would be provided.

CONDITIONAL QUESTION: As audited financial statements are unavailable, please describe the financial information that could be provided instead.

SECTION 5: CERTIFICATES OF INSURANCE

Respondents must disclose their current coverage and ability to meet the required limits. Shortlisted Respondents must provide final evidence of all required coverage before commencing services.

If shortlisted, will your entity provide Certificates of Insurance, including the following coverages?

- Commercial General Liability
(for bodily injury, property damage, and personal injury: \$1,000,000 each occurrence, \$2,000,000 in aggregate);
- Business Automobile Liability
("any auto", Company Vehicles, minimum \$1,000,000);
- Personal Automobile Liability
("any auto", Personal Vehicles, minimum \$500,000); and
- Workers' Compensation and Employers' Liability injury or death
(minimum \$1,000,000 each accident). EPL is not required for Sole Proprietor.

Yes / No

CONDITIONAL QUESTION: Describe every coverage gap, exception, qualification, or condition concerning the insurance requirements.

SECTION 6: OPTIONAL SUPPLIER DIVERSITY QUESTIONNAIRE

Questionnaire can be downloaded [from this link](#). Once completed, please upload the form here.

Please note your response (or lack thereof) will have no impact on your contract status or eligibility to work with WestLight Energy in accordance with State law.

QUESTIONS FOR SERVICE 1

SERVICE 1: SC AGENT

Do you wish to submit a proposal for:

Service 1: SC Agent

Yes / No

SERVICE 1: SC AGENT - SC Certification & Status

Answer each question only for the entity and personnel that would perform this service

Is your entity currently certified by CAISO and listed on the CAISO's [list of SC Entities](#)?

Yes / No

CONDITIONAL QUESTION: Please explain how your entity intends to become certified with CAISO prior to this service commencing.

If an affiliate or subcontractor will provide a material part or all of this service on behalf of your entity, please provide details of the proposed division of duties between the entities.

Please enter "N/A" if not applicable.

Provide your entity's legal name.

Please include the legal name of any affiliate or subcontractor proposed to provide services on behalf of your entity.

Provide your entity's active SCID(s).

Please include the active SCID(s) of any affiliate or subcontractor proposed to provide services on behalf of your entity.

Provide your entity's initial CAISO certification date.

Please include the initial CAISO certification date of any affiliate or subcontractor proposed to provide services on behalf of your entity.

Provide your entity's current CAISO certification status.

Please include the current CAISO certification status of any affiliate or subcontractor proposed to provide services on behalf of your entity.

Is there any limitation, suspension, or pending termination affecting your entity's status as a Scheduling Coordinator?

If yes, please provide a narrative description of this.

Please include details of any limitation, suspension, or pending termination affecting any affiliate or subcontractor proposed to provide services on behalf of your entity.

SERVICE 1: SC AGENT - Experience and Capability

Describe your entity's experience of providing this service in CAISO since 2021.

Identify any Scope of Work activity that your entity does not propose to perform.

Please enter "N/A" if not applicable.

Confirm your entity can provide:

- 24-hour, seven-day real-time operations, including weekends and holidays;
- Seven-day day-ahead and pre-scheduling services;
- A continuously monitored CAISO real-time contact number;
- Coverage for concurrent market, outage, dispatch, and scheduling events; and
- Backup and escalation coverage for unexpected personnel unavailability.

Describe your entity's 24-hour, seven-day, real-time operations, including details of:

- Supervisory coverage;
- Shift structure and minimum simultaneous staffing;
- Shift handoff processes and communication of information between shifts;
- Escalation paths within your entity; and
- Anticipated escalation paths to and communication with WestLight.

Describe the primary and backup operating facilities and remote-operating capabilities that would support WestLight's operations.

Provide a narrative explaining your entity's experience meeting the scheduling requirements of CAISO and WECC.

SERVICE 1: SC AGENT - SC for Load

Please describe your entity's experience serving Load Serving Entities (LSEs) in CAISO. Include details of:

- Years of CAISO experience;
- Current number of LSEs for which your entity provides SC or SC Agent services; and
- Number of LSEs for which your entity has provided SC or SC Agent services since 2021.

Describe the process your entity would follow to retrieve WestLight's third-party load forecast and convert it into validated CAISO demand bids. Include details of:

- Methods for data transfer and/or retrieval that your entity is prepared for;
 - The data completeness checks;
 - Proposed solutions for revised, late, missing, or erroneous forecasts; and
 - How bid submission, confirmation, rejection, and resubmission is dealt with by your operators.
-

SERVICE 1: SC AGENT - SC for ISTs

Describe your entity's experience of managing Inter-SC Trades (ISTs) in CAISO. Include details of:

- Years of CAISO experience;
 - Current number of clients your entity manages IST trades for;
 - Number of clients your entity has managed IST trades for since 2021.
-

Describe the process your entity would follow to retrieve, submit, match, and track WestLight's ISTs. Include details of:

- Whether your entity's submission process is automated or manual;
 - The timing, frequency, and types of checks performed by your entity's staff to validate and match ISTs; and
 - The escalation process followed by your entity's staff to reconcile mismatched trades, including on weekends and holidays.
-

SERVICE 1: SC AGENT - SC for Resources

Describe your entity's experience of Scheduling non-dispatchable VERs, such as run-of-river hydro, solar, and wind in CAISO. Include details of:

- Years of CAISO experience;
- Current number of distinct entities and resources for which your entity provides SC or SC Agent services; and
- Number of distinct entities and resources for which your entity has provided SC or SC Agent services since 2021; and
- The markets and bid types that your entity has engaged in (Energy, Ancillary Services, RUC, Imbalance Reserve, Reliability Capacity, self-schedules).

Describe your entity's experience of Scheduling dispatchable VERs, such as solar and wind in CAISO. Include details of:

- Years of CAISO experience;
 - Current number of distinct entities and resources for which your entity provides SC or SC Agent services;
 - Number of distinct entities and resources for which your entity has provided SC or SC Agent services since 2021; and
 - The markets and bid types that your entity has engaged in (Energy, Ancillary Services, RUC, Imbalance Reserve, Reliability Capacity, self-schedules).
-

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Describe your entity's experience of Scheduling BESS resources in CAISO. Include details of:

- Your entity's years of experience in CAISO with each of the following BESS types:
 - a) Standalone BESS
 - b) Hybrid BESS
 - c) Co-Located BESS
 - d) 8-hour Standalone BESS
- Current number of distinct entities and BESS resources your entity provides SC or SC Agent services for;
- Number of distinct entities and BESS resources your entity has provided SC or SC Agent services for since 2021; and
- The markets and bid types that your entity has engaged in (Energy, Ancillary Services, RUC, Imbalance Reserve, Reliability Capacity, self-schedules).

Does your entity have experience acting as the SC for a generation resource that is optimized by a third party?

Yes / No

If the SC Agent service and the Optimization services (Services 2, 3, and 4) are contracted to two separate entities, please explain how your entity would deal with each of the following, clearly distinguishing your entity's responsibilities from the Optimizer's responsibilities:

- Receiving and validating bids from the Optimizer(s);
 - Energy, Ancillary Services, RUC, Imbalance Reserve, Reliability Capacity, and Self-Schedule Submissions;
 - Submission deadlines and required approvals;
 - Conflicting, incomplete, late, or infeasible instructions;
 - SIBR rejection and resubmission controls;
 - Communicating with and tracking information received from WestLight, resource operators, the BESS optimizer, and other designated parties;
 - Emergency decision rights;
 - Preserving a complete instruction and bid-version history;
 - Forced outages and derates;
 - Asset underperformance; and
 - Incorrect SOC or other telemetry values.
-

SERVICE 1: SC AGENT - CAISO Liaison

Describe your experience with CAISO submissions, including where applicable:

- RA/Supply Plans, CIRA validation, and cross-validation;
- SQMD plans, affirmations, and audits;
- Annual and monthly historical load submissions;
- MIC and bilateral import-allocation-right transactions; and
- Annual officer certifications.

Please include details of how your entity tracks and communicates CAISO deadlines and revision timelines with clients

Please describe how your entity engages in CAISO's market development, including Tariff, Business Practice Manual (BPM), market, and compliance changes.

Describe your experience performing UAA functions for client-owned SCIDs.

SERVICE 1: SC AGENT - CAISO Settlement, Invoicing, Disputes, Collateral

Describe your CAISO bid-to-bill and shadow-settlement operating model, including details of:

- Software systems used, separately identifying any proprietary, third-party, or manually maintained components;
 - Review and approval responsibilities;
 - Timing and types of shadow-settlement reports provided to WestLight; and
 - The timing of delivery of invoice validation reports to WestLight, using a typical Wednesday CAISO invoice publication as an example.
-

Describe how your entity tracks real-time operational issues through settlement and resettlement. Please include details of how:

- Operational issues and settlement results are tracked;
 - How data revision, approval, and resubmission is managed by your entity;
 - How deadlines for data resubmission are communicated to your clients and their third-party vendors if applicable; and
 - How your entity communicates expected settlement and resettlement outcomes with its clients.
-

Regarding CAISO settlement, resettlement, and ad-hoc settlement calendars:

- Does your entity track these dates and associated deadlines; and
- How does your entity communicate this information to clients.

Describe how your entity version-controls, validates, and retains data used for settlements and resettlements, including CAISO ad-hoc settlements.

Please provide at least one example in which your entity identified and resolved an issue involving CAISO, meter, bid, or settlement data. Include details of:

- How the issue was detected and quantified;
- How the issue and proposed solutions were communicated to the client, including any required approvals;
- How the operational and settlement impacts were managed; and
- How your entity verified that the issue was fully resolved.

Please provide at least one example in which your entity identified a resource scheduling or performance issue and recommended a corrective change to a client. Include details of:

- How the issue was detected and quantified;
- How the issue and proposed change were communicated to the client, including the expected risks and benefits;
- How the recommended change was implemented, including coordination with the client and any third parties; and
- How the value and risk of the change was measured ex post.

Describe your experience with logging and managing disputes with CAISO since 2021.

Provide examples of both settlement and optimization disputes if possible.

SERVICE 1: SC AGENT - Outage Management

Describe your entity's process for managing outages and derates. Please explain how your entity:

- Coordinates with CAISO, clients, resource owners, resource operators, and optimizers;
- Communicates applicable RA requirements and responsibilities among clients and third parties;
- Submits and manages WebOMS tickets;
- Communicates outage changes and updates outages in the CAISO systems;
- Communicates outage changes internally;
- Determines potential RA impacts, and communicates substitution needs with clients;
- Submits and manages CIRA substitutions; and
- Tracks outages and derates, including through settlement and resettlement.

Please include examples of how your entity manages both forced and planned outages.

Describe your entity's process for managing RT operations, including details of how your entity manages, monitors, and/or rectifies the following:

- ADS instructions and missed dispatches;
- System and economic curtailments;
- Telemetry failures;
- SOC issues; and
- Operating constraint conflicts.

SERVICE 1: SC AGENT - Data and Tracking

Describe the systems your entity would provide WestLight access to for visualizing and downloading Real-Time (RT) data, including plant SCADA data, bids, dispatches, prices, and SOC.

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Detail your entity's experience working with resource owners, plant operators, and/or other SCs to gain access to plant telemetry data, including an example of where obstacles to retrieving data were overcome, if applicable.

Provide a list of the reports and/or dashboards that your entity would provide WestLight if chosen for the SC Agent service.

Please include the name, purpose, fields, cadence, delivery format, and timing of each.

Please provide anonymized samples of the reports and dashboards your entity would make available to WestLight under this service.

Submission of samples is optional at the proposal stage. Respondents selected for the shortlist will be required to provide representative samples.

Describe the systems your entity would provide WestLight access to for visualizing and downloading e-Tag data.

Describe the systems your entity would provide WestLight access to for visualizing and downloading shadow settlement results.

Describe the logs or systems your entity would provide WestLight access to for tracking SC related issues, including:

- Outage tracking;
 - Settlement issues and resettlement tracking;
 - CAISO compliance filing dates;
 - Operational issues;
 - Open issue/dispute tracker; and
 - Other trackers or logs.
-

SERVICE 1: SC AGENT - New Resource Implementation (NRI)

Summarize your entity's production experience supporting CAISO NRI, specifically for standalone and Co-Located BESS, including the number of projects completed since 2021.

SERVICE 1: SC AGENT - SC Transition

Provide a preliminary transition plan supporting a December 1, 2026, commencement date. Please include the critical path, dependencies, minimum lead time, and major milestones.

SERVICE 1: SC AGENT - Pricing

Please provide your entity's proposed pricing for this service. Please itemize:

- One-time implementation fees;
- Recurring fees;
- Task specific and/or resource specific fees;
- Fees for optional services; and
- Hourly rates for out-of-scope work.

Clearly identify the pricing basis, assumptions, exclusions, annual escalators, pass-through expenses, taxes, and any minimum commitments.

Please identify the NRI activities that are included in your entity's base SC fee, versus those separately priced.

SERVICE 1: SC AGENT - References

Provide at least two client references for this service from clients for whom your entity has performed services comparable in scope and complexity. For each reference, include:

- Client name;
- Brief description of the services provided;
- Service dates;
- Reference contact's name, title, email address, and telephone number; and
- An explanation of any material differences between the referenced engagement and the service proposed for WestLight.

If proposing multiple services, references may be used for more than one service where applicable; however, the proposal must include at least three distinct client references in total.

QUESTIONS FOR SERVICE 2

SERVICE 2: VER OPTIMIZATION

Do you wish to submit a proposal for:

Service 2: VER Optimization

Yes / No

SERVICE 2: VER OPTIMIZATION - Experience and Capability

Where a response is identical to a response provided for another Optimization Service, you may cross-reference that response. Please clearly identify all differences applicable to this service.

Describe your entity's experience of providing this service in CAISO since 2021.

Identify any Scope of Work activity that your entity does not propose to perform.

Please enter "N/A" if not applicable.

SERVICE 2: VER OPTIMIZATION - Forecast

Identify each price forecast your entity will use and describe:

- Whether it is proprietary or third-party;
- Provider's name (if not proprietary);
- Markets, products, and pricing locations covered;
- Forecast horizon, resolution, and update frequency;
- Back-testing and available out-of-sample performance metrics;
- Data-quality and failure controls; and
- Integration with the optimization process.

If your entity will use a generation forecast instead of or in addition to the CAISO VER forecast, identify each forecast and describe:

- Whether it is proprietary or third-party;
- Provider's name (if not proprietary);
- Resource and geographic coverage;
- Horizon, resolution, update frequency, and input data;
- Performance monitoring and available accuracy results;
- Failure controls; and
- Integration with telemetry, outage data, and optimization.

Please enter “N/A” if not applicable.

SERVICE 2: VER OPTIMIZATION - Optimization

Describe your entity's optimization engine, including:

- The objective function and treatment of revenues, costs, imbalance exposure, curtailment, risks, and penalties;
- Use of price forecasts, generation forecasts, telemetry, outage information, and other inputs, including treatment of forecast uncertainty and data-quality issues;
- Co-optimization across applicable CAISO market products;
- Treatment of operational, interconnection, PPA, RA, warranty, and contractual requirements and constraints;
- Roles of automation, AI, and human operators;
- Parameters WestLight or the SC Agent may configure and adjust; and
- Optimization and re-optimization cadence, including the events or market conditions that trigger an updated strategy.

Describe your entity's proposed Day-Ahead Market (DAM) bidding and bid-update workflow for all resources it would optimize, including:

- The timing and cadence of the DAM optimization workflow, including the delivery or submission of initial and updated DAM bids;
- How frequently bids would be re-optimized before the applicable CAISO deadline and what conditions would trigger an ad-hoc revised bid;
- How revised bids would be communicated, identified, version-controlled, and confirmed as received;
- 24x7 monitoring and escalation coverage; and
- The procedure when no bid update is required.

Please distinguish between bids submitted directly to CAISO and bids delivered to an SC Agent, where applicable.

Describe your entity's proposed Fifteen-Minute Market (FMM) bidding and bid-update workflow for all resources it would optimize, including:

- The timing and cadence of the FMM optimization workflow, including the delivery or submission of initial and updated FMM bids;
- How frequently bids would be re-optimized before the applicable CAISO deadline and what conditions would trigger an ad-hoc revised bid;
- How revised bids would be communicated, identified, version-controlled, and confirmed as received;
- 24x7 monitoring and escalation coverage; and
- The procedure when no bid update is required.

Please distinguish between bids submitted directly to CAISO and bids delivered to an SC Agent, where applicable.

SERVICE 2: VER OPTIMIZATION - Bid Delivery

Regarding CAISO bid delivery, indicate whether your entity proposes to:

- ☐ Submit bids directly to CAISO;
- ☐ Deliver submission-ready bids directly to the SC Agent;
- ☐ Use a combination of these models depending on the resource, market, or timeframe; and/or
- ☐ Other _____

Please select all that apply. If choosing "Other", please provide an explanation of your proposed approach.

CONDITIONAL QUESTION: Complete this question if your entity is proposing an approach requiring the SC Agent to submit bids to CAISO.

Explain how your entity will confirm timely submission, verify that the approved bid or strategy was accurately reflected in the bid submitted to CAISO, and resolve discrepancies.

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Describe the proposed bid-development and delivery framework, including details of:

- Roles and responsibilities including approvals;
- Validation controls;
- Audit records; and
- Submission confirmations.

Please distinguish between direct CAISO submission and delivery to the SC Agent.

Describe how your entity would version-control, approve, communicate, and retain bids and other bid-related deliverables, as applicable, including timestamps, audit trails, fallback bid sets, submission acknowledgments, and records provided to the SC Agent and WestLight.

WestLight works with multiple SCs. Certain resources included in this service will remain represented by an existing Seller's or third-party SC and will not be included in the SC Agent Service.

The current required delivery deadlines for complete, validated, submission-ready Day-Ahead bids are:

Wind Resource A: 5:00 a.m. PPT on the applicable pre-schedule calendar day.

Wind Resource B: 6:30 a.m. PPT on the applicable pre-schedule calendar day.

Please indicate whether your entity can meet the applicable deadline for each resource.

Wind Resource A: Yes / No

Wind Resource B: Yes / No

CONDITIONAL QUESTION: Complete this question only if your entity answered "No" for either resource above.

Identify the affected resource(s) (A and/or B) and provide the earliest alternative Day-Ahead bid-delivery time your entity can commit to.

For VER resources included in the optimization service but represented by a Seller's or third-party SC, can your entity deliver complete, validated, submission-ready optimized FMM bids to the applicable SC more than 30 minutes before each applicable CAISO FMM bid-submission deadline?

Yes / No

CONDITIONAL QUESTION: Complete this question only if your entity answered "No" to the question above.

Provide the alternative FMM bid-delivery timeline your entity can commit to and explain whether it would vary by resource or operating condition.

For Day-Ahead and FMM bids delivered to a Seller's or third-party SC, please describe:

- The available file formats and data-transfer interfaces;
- Bid validation and quality control procedures;
- Procedures for confirming successful and accurate receipt;
- Procedures for communicating corrections or revised bids; and
- Whether the applicable DAM or FMM delivery timelines described above would affect the quality of the optimization.

Please enter "N/A" if not applicable.

SERVICE 2: VER OPTIMIZATION - IT, Data, and Fallback Procedures

Describe the IT systems, interfaces, and resource-data connections your entity would use to:

- Connect to applicable CAISO systems; and
- Receive Real-Time telemetry and operational data from the SC Agent, resource operator, or resource systems.

Describe your entity's fallback procedures for lost or inaccurate telemetry, communications failures, system outages, failed or rejected bids, and other operational disruptions.

Please include details of backup systems or bid sets, decision authority, notifications, escalation, recovery procedures, and response times.

SERVICE 2: VER OPTIMIZATION - Performance Monitoring and Reporting

Describe the systems, staffing, and controls your entity will use to monitor the resources and market outcomes, including:

- Hours of coverage;
- Automated and manual monitoring;
- Alert thresholds;
- Escalation and response-time commitments;
- Coordination with the SC Agent and resource operator;
- Re-optimization and re-offer procedures; and
- Proposed performance reports and delivery frequency.

Please provide anonymized samples of the reports and dashboards your entity would make available to WestLight under this service.

Submission of samples is optional at the proposal stage. Respondents selected for the shortlist will be required to provide representative samples.

SERVICE 2: VER OPTIMIZATION - Pricing

Please provide your entity's proposed pricing for this service. Please itemize:

- One-time implementation fees;
- Recurring fees;
- Task specific and/or resource specific fees;
- Fees for optional services; and
- Hourly rates for out-of-scope work.

Clearly identify the pricing basis, assumptions, exclusions, annual escalators, pass-through expenses, taxes, and any minimum commitments.

SERVICE 2: VER OPTIMIZATION - References

Provide at least two client references for this service from clients for whom your entity has performed services comparable in scope and complexity. For each reference, include:

- Client name;
- Brief description of the services provided;
- Service dates;
- Reference contact's name, title, email address, and telephone number; and
- An explanation of any material differences between the referenced engagement and the service proposed for WestLight.

If proposing multiple services, references may be used for more than one service where applicable; however, the proposal must include at least three distinct client references in total.

QUESTIONS FOR SERVICE 3

SERVICE 3: BESS OPTIMIZATION

Do you wish to submit a proposal for:

Service 3: BESS Optimization

Yes / No

SERVICE 3: BESS OPTIMIZATION - Experience and Capability

Where a response is identical to a response provided for another Optimization Service, you may cross-reference that response. Please clearly identify all differences applicable to this service.

Describe your entity's experience of providing this service in CAISO since 2021.

Identify any Scope of Work activity that your entity does not propose to perform.

Please enter "N/A" if not applicable.

SERVICE 3: BESS OPTIMIZATION - Forecast

Identify each price forecast your entity will use and describe:

- Whether it is proprietary or third-party
 - Provider's name (if not proprietary)
 - Markets, products, and pricing locations covered
 - Forecast horizon, resolution, and update frequency
 - Back-testing and available out-of-sample performance metrics
 - Data-quality and failure controls
 - Integration with the optimization process
-

SERVICE 3: BESS OPTIMIZATION - Optimization

Describe your entity's optimization engine, including:

- The objective function and treatment of revenues, costs, imbalance exposure, risks, and penalties;
 - Use of price forecasts, telemetry, SOC and availability data, outage information, and other inputs, including treatment of forecast uncertainty and data-quality issues;
 - Battery degradation, cycling limits, and SOC management;
 - Co-optimization across applicable CAISO market products;
 - Treatment of operational, interconnection, PPA, RA, warranty, and contractual requirements and constraints;
 - Roles of automation, AI, and human operators;
 - Parameters WestLight or the SC Agent may configure and adjust; and
 - Optimization and re-optimization cadence, including the events or market conditions that trigger an updated strategy.
-

Describe your entity's proposed DAM bidding and bid-update workflow for all resources it would optimize, including:

- The timing and cadence of the DAM optimization workflow, including the delivery or submission of initial and updated DAM bids;
- How frequently bids would be re-optimized before the applicable CAISO deadline and what conditions would trigger an ad-hoc revised bid;
- How revised bids would be communicated, identified, version-controlled, and confirmed as received;
- 24x7 monitoring and escalation coverage; and
- The procedure when no bid update is required.

Please distinguish between bids submitted directly to CAISO and bids delivered to an SC Agent, where applicable.

Describe your entity's proposed FMM bidding and bid-update workflow for all resources it would optimize, including:

- The timing and cadence of the FMM optimization workflow, including the delivery or submission of initial and updated FMM bids;
- How frequently bids would be re-optimized before the applicable CAISO deadline and what conditions would trigger an ad-hoc revised bid;
- How revised bids would be communicated, identified, version-controlled, and confirmed as received;
- 24x7 monitoring and escalation coverage; and
- The procedure when no bid update is required.

Please distinguish between bids submitted directly to CAISO and bids delivered to an SC Agent, where applicable.

Describe how your entity would coordinate with the SC Agent, WestLight, and the resource operator to identify, manage, and resolve issues affecting BESS resources. Include details of how your entity would:

- Monitor BESS resources and their bidding and dispatch activity in Real-Time for issues, including but not limited to:
 - Missed dispatches;
 - Incorrect SOC, telemetry, availability, outage, or derate data;
 - Asset underperformance;
 - Operating-constraint conflicts; and
 - Conflicting, incomplete, late, rejected, or infeasible bids or operating instructions;
 - Communicate and coordinate with the SC Agent, WestLight, and the resource operator, including:
 - Each party's roles, responsibilities, and decision rights; and
 - Communication timelines, notification and escalation procedures, and response times; and
 - Document, track, and confirm resolution of identified issues.
-

SERVICE 3: BESS OPTIMIZATION - Bid Delivery

Regarding CAISO bid delivery, indicate whether your entity proposes to:

- ☐ Submit bids directly to CAISO;
- ☐ Deliver submission-ready bids directly to the SC Agent;
- ☐ Use a combination of these models depending on the resource, market, or timeframe; and/or
- ☐ Other _____

Please select all that apply. If choosing "Other", please provide an explanation of your proposed approach.

CONDITIONAL QUESTION: Complete this question if your entity is proposing an approach requiring the SC Agent to submit bids to CAISO.

Explain how your entity will confirm timely submission, verify that the approved bid or strategy was accurately reflected in the bid submitted to CAISO, and resolve discrepancies.

Describe the proposed bid-development and delivery framework, including details of:

- Roles and responsibilities including approvals
- Validation controls
- Audit records
- Submission confirmations

Please distinguish between direct CAISO submission and delivery to the SC Agent.

Describe how your entity would version-control, approve, communicate, and retain bids and other bid-related deliverables, as applicable, including timestamps, audit trails, fallback bid sets, submission acknowledgments, and records provided to the SC Agent and WestLight.

SERVICE 3: BESS OPTIMIZATION - IT, Data, and Fallback Procedures

Describe the IT systems, interfaces, and resource-data connections your entity would use to:

- Connect to applicable CAISO systems; and
 - Receive Real-Time telemetry and operational data from the SC Agent, resource operator, or resource systems.
-

Describe your entity's fallback procedures for lost or inaccurate telemetry, communications failures, system outages, failed or rejected bids, and other operational disruptions.

Please include details of backup systems or bid sets, decision authority, notifications, escalation, recovery procedures, and response times.

SERVICE 3: BESS OPTIMIZATION - Performance Monitoring and Reporting

Describe the systems, staffing, and controls your entity will use to monitor the resources and market outcomes, including:

- Hours of coverage
 - Automated and manual monitoring
 - Alert thresholds
 - Escalation and response-time commitments
 - Coordination with the SC Agent and resource operator
 - Re-optimization and re-offer procedures
 - Proposed performance reports and delivery frequency
-

Please provide anonymized samples of the reports and dashboards your entity would make available to WestLight under this service.

Submission of samples is optional at the proposal stage. Respondents selected for the shortlist will be required to provide representative samples.

SERVICE 3: BESS OPTIMIZATION - Pricing

Please provide your entity's proposed pricing for this service. Please itemize:

- One-time implementation fees
- Recurring fees
- Task specific and/or resource specific fees
- Fees for optional services
- Hourly rates for out-of-scope work

Clearly identify the pricing basis, assumptions, exclusions, annual escalators, pass-through expenses, taxes, and any minimum commitments.

SERVICE 3: BESS OPTIMIZATION - References

Provide at least two client references for this service from clients for whom your entity has performed services comparable in scope and complexity. For each reference, include:

- Client name;
- Brief description of the services provided;
- Service dates;
- Reference contact's name, title, email address, and telephone number; and
- An explanation of any material differences between the referenced engagement and the service proposed for WestLight.

If proposing multiple services, references may be used for more than one service where applicable; however, the proposal must include at least three distinct client references in total.

QUESTIONS FOR SERVICE 4

SERVICE 4: CO-LOCATED AND HYBRID SOLAR/BESS OPTIMIZATION

Do you wish to submit a proposal for:

Service 4: Co-Located and Hybrid Solar/BESS Optimization

Yes / No

SERVICE 4: CO-LOCATED AND HYBRID SOLAR/BESS OPTIMIZATION - Experience and Capability

Where a response is identical to a response provided for another Optimization Service, you may cross-reference that response. Please clearly identify all differences applicable to this service.

Describe your entity's experience providing this service in CAISO since 2021.

Identify any Scope of Work activity that your entity does not propose to perform.

Please enter "N/A" if not applicable.

SERVICE 4: CO-LOCATED AND HYBRID SOLAR/BESS OPTIMIZATION - Forecast

Identify each price forecast your entity will use and describe:

- Whether it is proprietary or third-party
- Provider's name (if not proprietary)
- Markets, products, and pricing locations covered
- Forecast horizon, resolution, and update frequency
- Back-testing and available out-of-sample performance metrics
- Data-quality and failure controls
- Integration with the optimization process

If your entity will use a generation forecast instead of or in addition to the CAISO VER forecast, identify each forecast and describe:

- Whether it is proprietary or third-party
- Provider's name (if not proprietary)
- Resource and geographic coverage
- Horizon, resolution, update frequency, and input data
- Performance monitoring and available accuracy results
- Failure controls
- Integration with telemetry, outage data, and optimization

Please enter “N/A” if not applicable.

SERVICE 4: CO-LOCATED AND HYBRID SOLAR/BESS OPTIMIZATION - Optimization

Describe your entity's optimization engine, including:

- The objective function and treatment of revenues, costs, imbalance exposure, curtailment, risks, and penalties;
 - Use of price forecasts, solar-generation forecasts, telemetry, SOC and availability data, outage information, and other inputs, including treatment of forecast uncertainty and data-quality issues;
 - Integrated optimization of the solar and BESS components, including charging, discharging, cycling limits, battery degradation, and SOC management;
 - Co-optimization across applicable CAISO market products;
 - Treatment of differences between Co-Located Resource and Hybrid Resource configurations, including coordination of bids, schedules, awards, and dispatch across the solar and BESS components;
 - Treatment of shared interconnection and export limits, charging-source restrictions, and operational, PPA, RA, warranty, and contractual requirements and constraints;
 - Roles of automation, AI, and human operators;
 - Parameters WestLight or the SC Agent may configure and adjust; and
 - Optimization and re-optimization cadence, including the events or market conditions that trigger an updated strategy.
-

Describe your entity's proposed DAM bidding and bid-update workflow for all resources it would optimize, including:

- The timing and cadence of the DAM optimization workflow, including the delivery or submission of initial and updated DAM bids;
- How frequently bids would be re-optimized before the applicable CAISO deadline and what conditions would trigger an ad-hoc revised bid;
- How revised bids would be communicated, identified, version-controlled, and confirmed as received;
- How revised bids would be communicated, identified, version-controlled, and confirmed as received;
- 24x7 monitoring and escalation coverage; and
- The procedure when no bid update is required.

Please distinguish between bids submitted directly to CAISO and bids delivered to an SC Agent, where applicable.

Describe your entity's proposed FMM bidding and bid-update workflow for all resources it would optimize, including:

- The timing and cadence of the FMM optimization workflow, including the delivery or submission of initial and updated FMM bids
- How frequently bids would be re-optimized before the applicable CAISO deadline and what conditions would trigger an ad-hoc revised bid
- How revised bids would be communicated, identified, version-controlled, and confirmed as received;
- 24x7 monitoring and escalation coverage; and
- The procedure when no bid update is required.

Please distinguish between bids submitted directly to CAISO and bids delivered to an SC Agent, where applicable.

Describe how your entity would coordinate with the SC Agent, WestLight, and the resource operator to identify, manage, and resolve issues affecting Co-Located and Hybrid Solar/BESS resources. Include details of how your entity would:

- Monitor the Solar and BESS components and their bidding and dispatch activity in Real-Time for issues, including but not limited to:
 - Missed dispatches;
 - Incorrect SOC, telemetry, solar-generation, availability, outage, or derate data;
 - Underperformance of the Solar and/or BESS components;
 - Conflicting operating constraints, shared interconnection or export limits, and/or charging restrictions; and
 - Conflicting, incomplete, late, rejected, or infeasible bids or operating instructions;
 - Communicate and coordinate with the SC Agent, WestLight, and the resource operator, including:
 - Each party's roles, responsibilities, and decision rights; and
 - Communication timelines, notification and escalation procedures, and response times; and
 - - Document, track, and confirm resolution of identified issues.
-

SERVICE 4: CO-LOCATED AND HYBRID SOLAR/BESS OPTIMIZATION - Bid Delivery

Regarding CAISO bid delivery, indicate whether your entity proposes to:

- ☐ Submit bids directly to CAISO;
- ☐ Deliver submission-ready bids directly to the SC Agent;
- ☐ Use a combination of these models depending on the resource, market, or timeframe; and/or
- ☐ Other _____

Please select all that apply. If choosing "Other", please provide an explanation of your proposed approach.

CONDITIONAL QUESTION: Complete this question if your entity is proposing an approach requiring the SC Agent to submit bids to CAISO.

Explain how your entity will confirm timely submission, verify that the approved bid or strategy was accurately reflected in the bid submitted to CAISO, and resolve discrepancies.

Describe the proposed bid-development and delivery framework, including details of:

- Roles and responsibilities including approvals
- Validation controls
- Audit records
- Submission confirmations

Please distinguish between direct CAISO submission and delivery to the SC Agent.

Describe how your entity would version-control, approve, communicate, and retain bids and other bid-related deliverables, as applicable, including timestamps, audit trails, fallback bid sets, submission acknowledgments, and records provided to the SC Agent and WestLight.

SERVICE 4: CO-LOCATED AND HYBRID SOLAR/BESS OPTIMIZATION - IT, Data, and Fallback Procedures

Describe the IT systems, interfaces, and resource-data connections your entity would use to:

- Connect to applicable CAISO systems
 - Receive Real-Time telemetry and operational data from the SC Agent, resource operator, or resource systems
-

Describe your entity's fallback procedures for lost or inaccurate telemetry, communications failures, system outages, failed or rejected bids, and other operational disruptions.

Please include details of backup systems or bid sets, decision authority, notifications, escalation, recovery procedures, and response times.

SERVICE 4: CO-LOCATED AND HYBRID SOLAR/BESS OPTIMIZATION - Performance Monitoring and Reporting

Describe the systems, staffing, and controls your entity will use to monitor the resources and market outcomes, including:

- Hours of coverage
 - Automated and manual monitoring
 - Alert thresholds
 - Escalation and response-time commitments
 - Coordination with the SC Agent and resource operator
 - Re-optimization and re-offer procedures
 - Proposed performance reports and delivery frequency
-

Please provide anonymized samples of the reports and dashboards your entity would make available to WestLight under this service.

Submission of samples is optional at the proposal stage. Respondents selected for the shortlist will be required to provide representative samples.

SERVICE 4: CO-LOCATED AND HYBRID SOLAR/BESS OPTIMIZATION - Pricing

Please provide your entity's proposed pricing for this service. Please itemize:

- One-time implementation fees
- Recurring fees
- Task specific and/or resource specific fees
- Fees for optional services
- Hourly rates for out-of-scope work

Clearly identify the pricing basis, assumptions, exclusions, annual escalators, pass-through expenses, taxes, and any minimum commitments.

SERVICE 4: CO-LOCATED AND HYBRID SOLAR/BESS OPTIMIZATION - References

Provide at least two client references for this service from clients for whom your entity has performed services comparable in scope and complexity. For each reference, include:

- Client name;
- Brief description of the services provided;
- Service dates;
- Reference contact's name, title, email address, and telephone number; and
- An explanation of any material differences between the referenced engagement and the service proposed for WestLight.

If proposing multiple services, references may be used for more than one service where applicable; however, the proposal must include at least three distinct client references in total.

QUESTIONS FOR ALL RESPONDENTS

OPTIONAL – BUNDLED PRICING

OPTIONAL - Bundled Pricing

If your entity proposes to provide more than one of the four services, please provide its most favorable combined commercial offer.

Please identify all bundled pricing, discounts, credits, incentives, or other cost savings; the services and contract terms required to receive them; and the terms and conditions applicable to each proposed bundle.

Clearly compare the bundled offer with the total standalone pricing for the same services.

OPTIONAL - RESPONDENT'S COMMENTS

OPTIONAL - Comments on Respondent's Proposal

Describe up to three characteristics that materially differentiate your organization from competing providers.

Please support each claim with a specific capability, example, or measurable result.

OPTIONAL - Gaps and Solutions

Identify the most material risk or capability gap associated with your proposal and describe the mitigation, control, or implementation commitment that addresses it.

OPTIONAL - Respondent's Comments

Please add additional comments below.

OPTIONAL - RESPONDENT'S ATTACHMENTS

OPTIONAL - Respondent's Attachments

Please upload attachments below