Energy Efficiency Third Party Solicitation Stakeholder Meeting

February 29, 2024

California Public Utilities Commission

Meeting Purpose and Goals

- Report out to stakeholders on completed solicitation milestones and upcoming solicitations
- Discuss recent regulatory and process updates
- Gather feedback and identify emerging issues from the public
- Provide stakeholders an opportunity for engagement with the IOU solicitations teams and third-party solicitations Independent Evaluators

Safety Message: 8 Rules for Pedestrian Safety

1. Obey traffic signs and signals.
2. Walk on sidewalks whenever they are available.
3. If there is no sidewalk, walk facing traffic and as far from traffic as possible.
4. Cross streets at crosswalks or intersections. Look for cars in all directions, including those turning left or right.
5. If a crosswalk or intersection is not available, locate a well-lit area where you have the best view of traffic. Wait for a gap in traffic that allows enough time to cross safely; continue watching for traffic as you cross.
6. Watch for cars entering or exiting driveways or backing up in parking lots.
7. Embrace walking as a healthy form of transportation - get up, get out and get moving.

Plus: Please don't text and walk!!

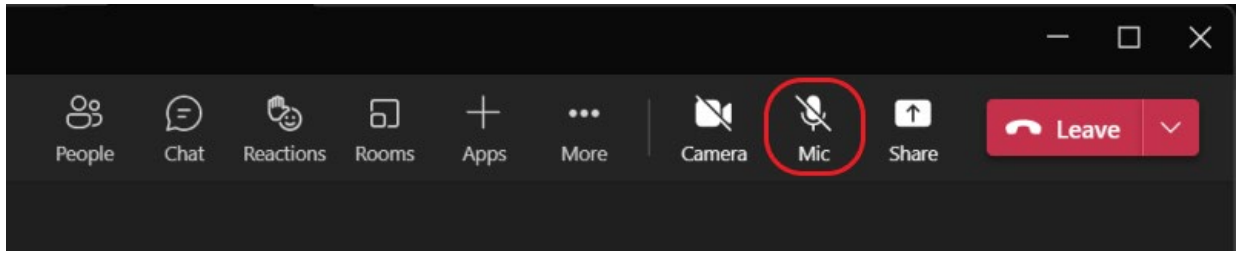
Source: United States Department of Transportation

Agenda

Time	Agenda Item
10:15 AM	Opening Remarks
10:25 AM	Session 1: EE Recent Decisions
10:45 AM	Session 2: Independent Evaluators' Semi-Annual Reports 2023
11:05 AM	**Break**
11:15 AM	Session 3: IOU Portfolio Update & Upcoming Solicitations
12:15 PM	**Lunch**
12:45 PM	Session 4: Implementer Panel
1:45 PM	**Break**
1:55 PM	Session 5: Independent Evaluator Panel
2:35 PM	Open Discussion
2:50 PM	Closing Remarks
3:00 PM	**Adjourn**

Logistics

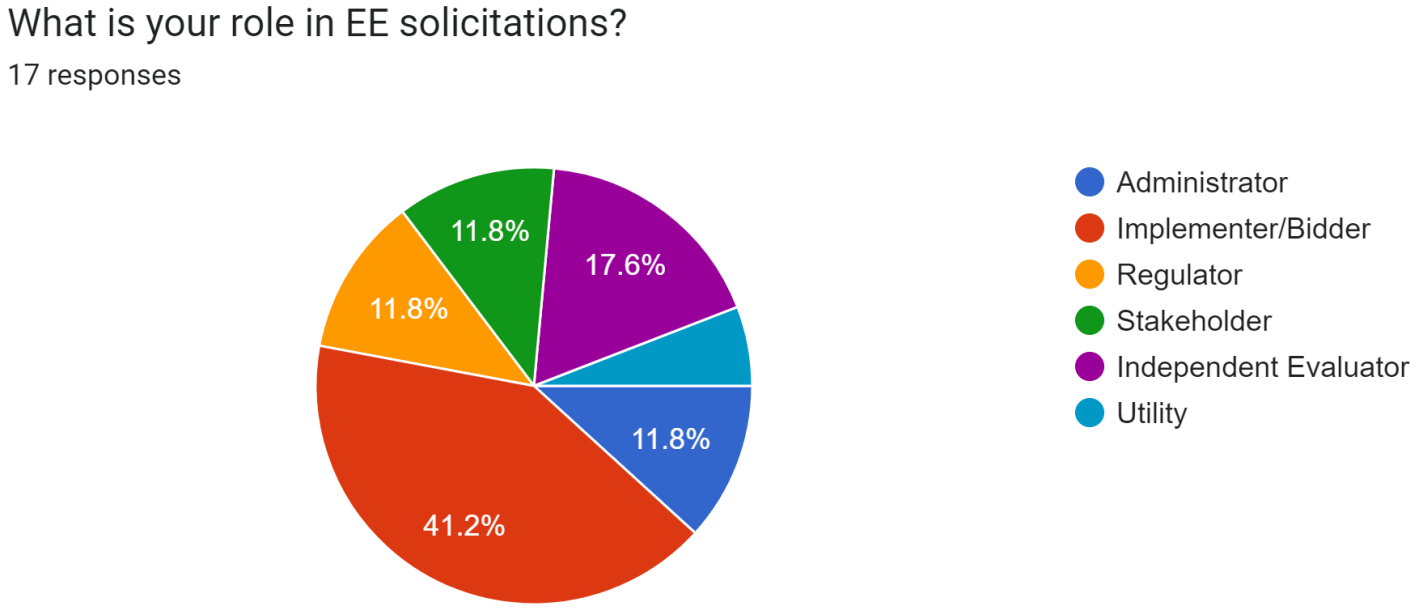
- All attendees have been muted
- To ask questions, please ‘raise your hand’ and a host will unmute you so you can ask your question
- If you would rather type, use the “Chat” function
- Chat questions will be read aloud by staff; attendees may be unmuted to respond to the answer verbally
- **Reminder** Please press mute when done speaking
- For anonymous questions, please contact: Gillian.Weaver@cpuc.ca.gov
- For those attending in person, there are notecards you can use to ask questions



Survey Overview from March 2023 Meeting

- Seventeen responses including 7 implementers / bidders, 2 "Stakeholders" and 3 IEs
- Suggestions for topics/areas of improvement included:
  - Length and complexity of solicitations process
  - Cultivating small and diverse businesses as 3P implementers
  - Distribution of risk in pay for performance programs
  - Feedback to bidders
- To participate in the survey for this meeting, scan the QR code or click the link in chat:

https://docs.google.com/forms/d/e/1FAIpQLSeBticX2NhDCsvYNdg9lapYcEf6_sSCstEkW9LeUVIz4Y6WkA/viewform?usp=sf_link



Ninth Semi-Annual Energy Efficiency Third Party Solicitations Stakeholder Engagement Forum

Jessie Levine, CPUC Energy Division Third-Party Lead

February 29, 2024

California Public Utilities Commission

Agenda

1. Third Party Solicitations Overview
2. Recent CPUC Policies
3. CPUC Resources for Third Parties
4. Questions and Survey

Third Party Solicitations Overview

Past Stakeholder Engagement

8 semiannual workshops
- July ‘19, Feb ‘20, July ‘20, Jan ‘21, July ‘21, Jan ‘22, July ‘22, Mar '23

1 CPUC all party meeting
- October ‘20

Contracts Executed to Date
- First contracts effective and programs launched in July 2020
- 103 contracts have been executed with 43 different implementers
- $1.9 billion in total program budgets approved
- Mean contract value: $19M

*Data updated as of February 2024

Recent CPUC Policies

Recent CPUC EE Decisions

D.23-02-002

EE Solicitations Process Improvements

February 2023

Removed requirement for two-stage solicitation process

Adopted oversight requirements and certain limits to contract provisions

D.23-04-035

EE Codes and Standards and Nat. Gas Measures

April 2023

Guidance on Incentives for Gas Energy Efficiency Measures

Guidance for Codes and Standards subprograms and budgets

D.23-06-055

EE Applications and Business Plans

June 2023

Adopts EE portfolios during the period 2024-2027 and the business plans for 2024-2031 from nine portfolio administrators

D.23-08-005

EE Goals for 2024-2035

August 2023

Adopts total system benefit (TSB) goals for ratepayer-funded EE portfolios for 2024 – 2035

Deep Dive: Decision (D.) 23-06-055 EE Applications and Business Plans

Total Budget and Collections Authorization for all Portfolio Administrators

Expanded Use of Metered Savings and Normalized Metered Energy Consumption for Resource Acquisition Programs

Non-REN PAs to solicit Market Access Programs in both residential and commercial downstream retrofit opportunities by July 1, 2024

Clarified three customer groups for the Equity Segment: Hard to Reach, Underserved, and Disadvantaged Communities

Adopted Indicators for the Equity and Market Support Segments

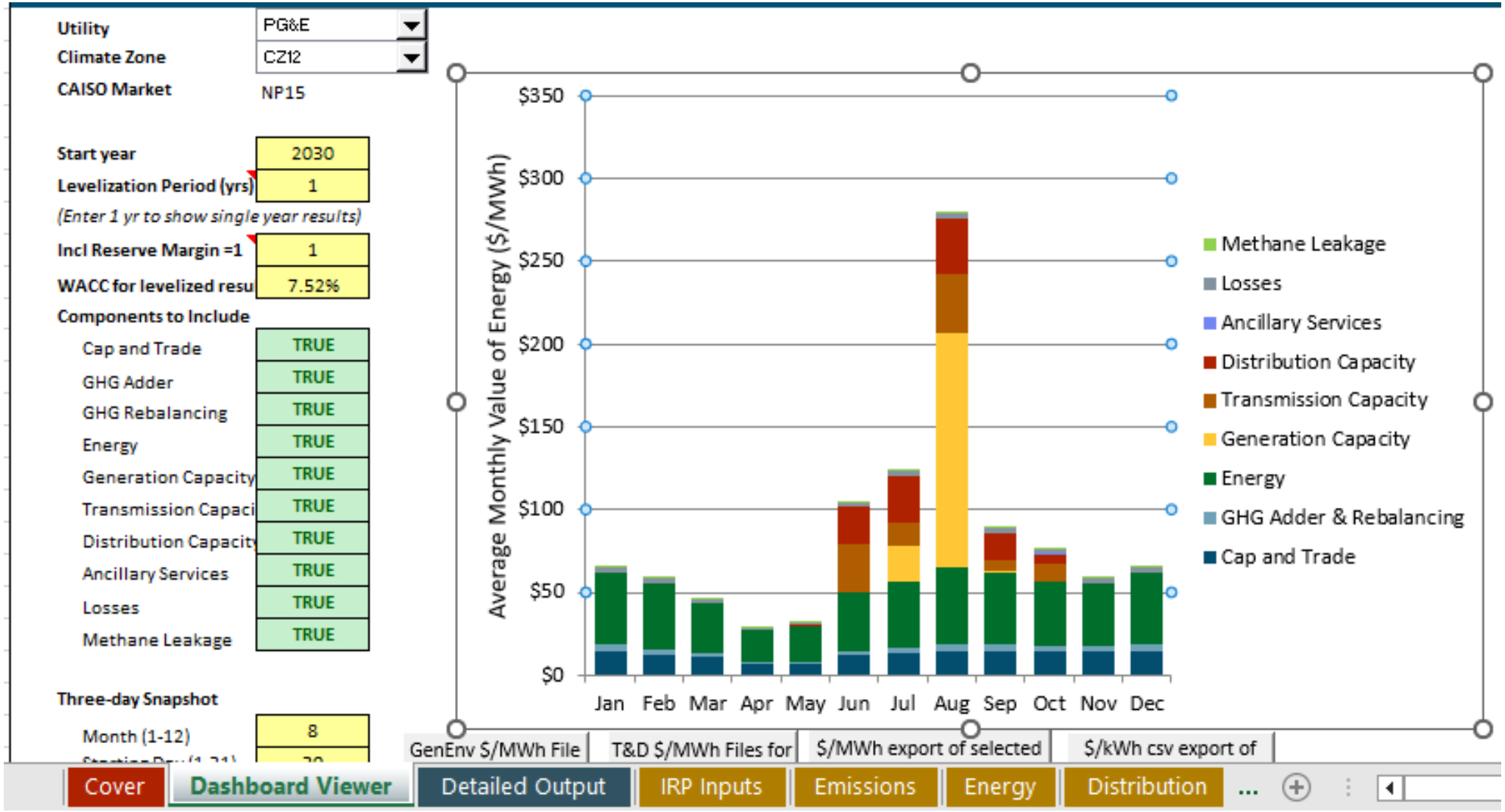
Integrated Demand Side Management: Comprehensive program strategy to allow a customer to install a multi-DER project, receiving incentives through one process

CPUC Resources for Third-Party Implementers

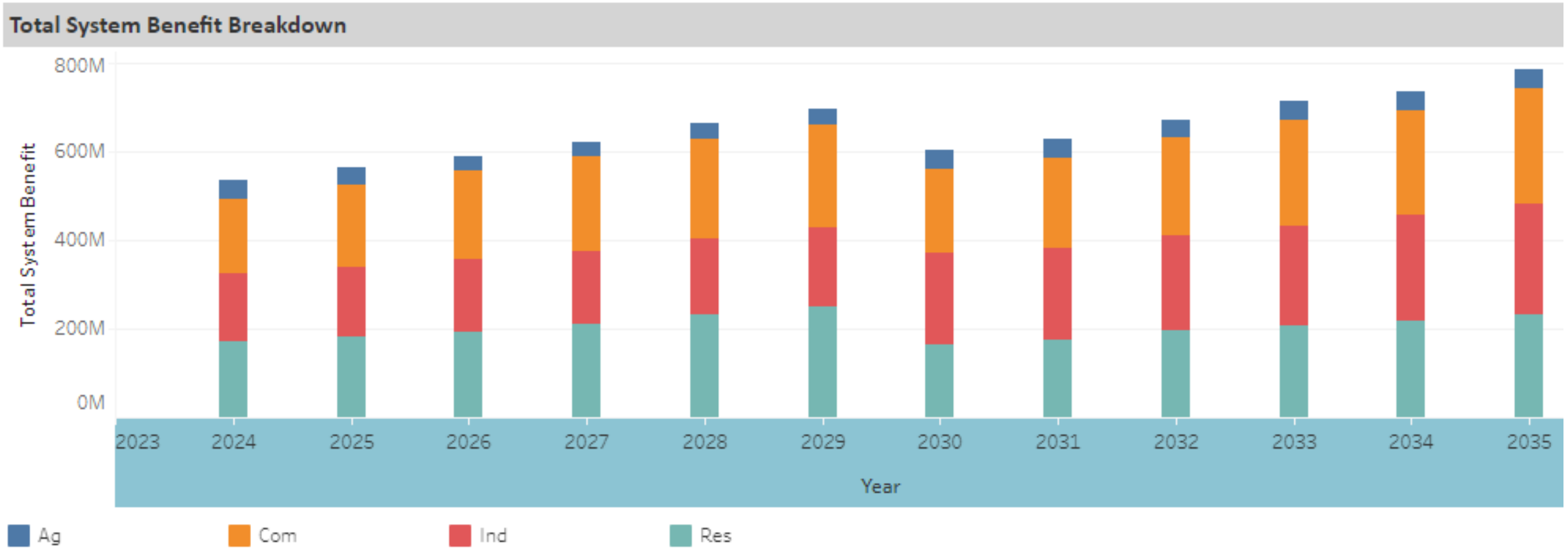
Avoided Cost Calculator (ACC)

- Total System Benefit (TSB) is calculated using the Avoided Cost Calculators
- The ACC is updated biennially in even years, typically adopted by early fall
- There are separate ACCs for gas, electric, and refrigerants
  - The Electric ACC is the hourly avoided costs per component of electricity including Generation Capacity, Energy, Transmission & Distribution Capacity, Ancillary Services, Renewable Portfolio Standard, Greenhouse Gas, High Global Warming Potential Gases (i.e., methane)
  - The Gas ACC is used for the evaluation of EE programs that impact natural gas usage. The model is a representation of gas avoided costs (commodity and T&D capacity)
  - The Refrigerant ACC calculates the avoided costs of refrigerant leakage for devices containing a refrigerant, when refrigerant type or amount is changed or a device is replaced early
- Resources for the ACC: 2022 Avoided Cost Calculator, 2024 ACC Update, CPUC Proceeding R.22-11-013; CPUC Standard Practice Manual

2022 Electric ACC Dashboard



2023 Potential and Goals Study: Public Facing Dashboard



Source: [2023 PG Study Results Viewer v2.0 | Tableau Public]() Final Decision: [D.23-08-005]()
Final Report: [cpuc.ca.gov/-/media/cpuc-website/divisions/energy-division/documents/energy-efficiency/2023-potential-goals-study/final-2023-group-e-pg-study-report.pdf]()

Ways to Participate in CPUC Processes

- **How to Track Issues of Interest (Service List)** (R.13-11-005)
  - Including workshops notices, application filings, decisions
  - Email **process_office@cpuc.ca.gov**
  - CPUC website with further information is linked here

- **How to Become a Party to a Proceeding** (R.13-11-005)
  - Formal way to participate in a proceeding and provides the most potential to impact the outcome of CPUC proceedings
  - CPUC Brochure is linked here and CPUC Website is linked here

- **Accessing the CPUC Docket Card**
  - Information and evidentiary records for CPUC proceedings
  - CPUC website → Proceedings and Rulemaking → Docket Card
  - Docket Card is linked here | Enter proceeding number R1311005

Other Demand Side Resource Programs

- **Energy Savings Assistance Program (ESA)**
  - Providing no-cost weatherization services to consumers who meet the CARE income limits | More information is linked here
- **CPUC Demand Response (DR) Resources**
  - DR is a way for customers to help California manage its electricity demand | More information is linked here
- **Building Decarbonization Resources**
  - Goal of reducing greenhouse gas emissions from buildings | More information is linked here
- **Self-Generation Incentive Program**
  - Provides rebates for qualifying distributed energy systems installed on the customer's side of the utility meter | More information is linked here

Publicly Facing Third Party Solicitations Materials

- Joint IOU Solicitation Timeline (February 2024)
  - Scheduled stages of solicitations, past and future
- Third-Party Implementers Table (February 2024)
  - Executed contracts, with date of execution and associated advice letters
- Energy Efficiency Third-Party Solicitations Dynamic Schedule (February 2024)
  - Gantt chart schedule showing milestone dates
- California Energy Data and Reporting System Program List
  - Filter for Third-Party Solicited programs
  - Shows expenditures, budgets, claimed savings, Implementation Plans

Questions?

Please complete the survey!

- Please make sure to complete the survey so that we can effectively respond to your feedback

California Public Utilities Commission

For more information:
Jessica.Levine@cpuc.ca.gov

For anonymous questions:
Gillian.Weaver@cpuc.ca.gov

INDEPENDENT EVALUATORS' OBSERVATIONS

Stakeholder Meeting

February 29, 2024

APEX ANALYTICS
BARAKAT CONSULTING, INC.
DON ARAMBULA CONSULTING
EAJ ENERGY ADVISORS
GREAT WORK ENERGY
MCR CORPORATE SERVICES

SEMI ANNUAL REPORTS OVERVIEW

- The IEs have submitted two semi-annual reports for each IOU since the last March 16, 2023 Stakeholder meeting
- The two reports cover the October 2022 – March 2023 timeframe and the April 2023 – September 2023 timeframe
- The reports were filed in June 2023 and December 2023
- The reports include updates on each of the solicitations active during the period and include IE observations and noted effective practices
- In this presentation, we share the status and assigned IE for the solicitations and some of the key Effective Practices that we have noted

PG&E SOLICITATIONS

	Solicitation		Assigned IE	Status
	Initial	Revised		
1	Local Agriculture	Local Multi-Sector	Barakat Consulting, Inc.	Complete
2	Local Commercial		EAJ Energy Advisors	
3	Local Industrial		Great Work Energy	
4	Local Public		Don Arambula Consulting	
5	Local Residential		The Mendota Group	
6	SW Res New Construction	SW New Construction	The Mendota Group	Complete
7	SW Nonres New Construction		EAJ Energy Advisors	
			Barakat Consulting	
8	Originally Not Proposed	Local Gov. Partnerships	Don Arambula Consulting	Complete
9	SW Codes & Standards	SW Codes & Standards	Barakat Consulting	Complete
10	SW WE&T: Career Connections K-12		Great Work Energy	Complete
11	SW WE&T: Career and Workforce Readiness		Great Work Energy	Complete
12	State of CA and Dept. of Corrections	State of California	Don Arambula Consulting	Complete
13	Micro- and Small Business EE Equity		Great Work Energy	Complete
14	Local C&S Compliance Improvement		EAJ Energy Advisors	Contracting

PG&E SOLICITATIONS

	Solicitation	Assigned IE	Status
15	Statewide C&S Advocacy	Don Arambula Consulting	Contracting
16	Local C&S Compliance	EAJ Energy Advisors	Contracting
17	Local C&S Code Readiness	EAJ Energy Advisors	RFP
18	Local Residential Equity	EAJ Energy Advisors	Contracting
19	Zonal Electrification	Great Work Energy	RFP
20	Residential Customer Energy Orchestration	Don Arambula Consulting	RFP
21	Summer Reliability Platform Administrator	Great Work Energy	RFP

SDG&E SOLICITATIONS

	Solicitation	Assigned IE	Solicitation Status
1	Local Small Commercial	The Mendota Group	Complete
2	Local Large Commercial	The Mendota Group	Complete
3	Local Multi-Family Residential	MCR Corporate Services	Complete
4	Statewide Plug Load and Appliance	Don Arambula Consulting	Complete
5	Statewide Upstream/Midstream HVAC	The Mendota Group	Complete
6	Local Public K-12	MCR Corporate Services	Complete
7	Local Public Sector Federal	MCR Corporate Services	Complete
8	Local Residential Single Family 1.0	Don Arambula Consulting	Canceled
9	Local Residential Single Family 2.0	Don Arambula Consulting	Complete
10	Local Government	Don Arambula Consulting	Complete
11	Local Agriculture	Barakat Consulting, Inc.	Complete
12	SW Res. HVAC Quality Installation/ Quality Maintenance	Don Arambula Consulting	Complete
13	Local Behavioral	MCR Corporate Services	Complete

SDG&E SOLICITATIONS

	Solicitation	Assigned IE	Solicitation Status
14	Local Industrial	The Mendota Group	Complete
15	Local Industrial – Port Tenants	The Mendota Group	Complete
16	WE&T-IEET	Barakat Consulting, Inc	Complete
17	Local Nonresidential Behavioral	Barakat Consulting, Inc	Complete
18	Local Small Business Outreach	MCR Corporate Services	Complete
19	Local Residential Equity Education and Outreach	Don Arambula Consulting	RFP
20	Local Retail, Office and Wholesale	Don Arambula Consulting	RFP
21	Local Groceries, Restaurants and Food Storage	Barakat Consulting, Inc	RFA

SCE SOLICITATIONS

	Solicitation	Assigned IE	Solicitation Status
1	Local Residential, Commercial, Industrial (RCI)	MCR Corporate Services	Complete
2	Statewide Lighting	Barakat Consulting, Inc.	Complete
3	Statewide Emerging Technologies (Electric)	Barakat Consulting, Inc.	Complete
4	Local Public	Don Arambula Consulting	Complete
5	Local Agricultural	Don Arambula Consulting	Complete
6	Statewide Higher Education	MCR Corporate Services	Complete
7	Statewide Water and Wastewater Pumping	MCR Corporate Services	Complete
8	Local Equity - Residential	Barakat Consulting, Inc	RFP
9	Local Equity - SMB	Barakat Consulting, Inc	RFP
10	Local Commercial Grocery	Don Arambula Consulting	Canceled
11	Local Commercial Food Services	Don Arambula Consulting	Canceled
12	Industrial & Agricultural SEM	Great Work Energy	RFP
13	Commercial SEM	Great Work Energy	RFP
14	Large Commercial	Merrimack	RFP

SOCALGAS SOLICITATIONS

	Solicitations	Assigned IEs	Solicitation Status
1	Local Residential Single Family	The Mendota Group	Completed
2	Local Residential Multifamily	The Mendota Group	Completed
3	Local Small and Medium Commercial	Don Arambula Consulting	Completed
4	Local Small and Medium Public	Apex Analytics	Completed
5	Statewide Point-of-Sale Food Service	MCR Corporate Services	Completed
6	Statewide Midstream Water Heating	MCR Corporate Services	Completed
7	Statewide Gas Emerging Technologies	Don Arambula Consulting	Completed
8	Local Residential Manufactured Homes	Apex Analytics	Completed
9	Local Large Commercial	Don Arambula Consulting	Completed
10	Local Agricultural	MCR Corporate Services	Completed
11	Local Behavioral	Apex Analytics	Completed
12	Local Industrial	Don Arambula Consulting	Completed
13	Local Large Public	Apex Analytics	Completed

SOCALGAS SOLICITATIONS

	Solicitations	Assigned IEs	Solicitation Status
14	Local Marketplace	Don Arambula Consulting	Completed
15	Local Outreach	Apex Analytics	Completed
16	Local Multifamily Whole Building	Apex Analytics	Completed
17	HERS Rater Training	MCR Corporate Services	Completed
18	Energy Efficiency Advisor	MCR Corporate Services	Completed
19	Local Industrial	Don Arambula Consulting	Completed
20	Local IDEEA 365	Don Arambula Consulting	RFP
21	Local Commercial SEM	Apex Analytics	RFP

EFFECTIVE SOLICITATION PRACTICES

Note: These Effective Practices are based on what was observed and reported on during the October 2022 through September 2023 Reporting Timeframe

EFFECTIVE SOLICITATIONS PRACTICES

- During the Semi-Annual Report development process, the IEs have identified effective practices focused on the 3P process
- We are only highlighting newly adopted Effective Practices by one or multiple IOUs during the most recent Semi-Annual Reporting Periods
- The effective practices presented here do not reflect a consensus among Independent Evaluators

EFFECTIVE SOLICITATION PRACTICES

Developing RFP Materials Early

For two stage solicitations, developing the RFP materials in parallel with Abstract evaluation reduces the overall timeline for the solicitation (minor modifications can be made post Abstract evaluation) (PG&E, SDG&E)

Contract Negotiations Preparation and Tracking

Creating detailed meeting agendas, calendaring all meeting dates, setting aside sufficient meeting times and having a matrix that tracks the progress of meetings / providing notes post negotiations helps keep the negotiations process on track (SDG&E, SoCalGas)

Score Team Diversity

Diversity in roles/backgrounds on the Score Team is a notable strength in bid evaluation. Calibration discussions can cover and balance a holistic view of all the elements necessary for program success (SCE, SDG&E)

EFFECTIVE SOLICITATION PRACTICES – CONTINUED

SBE Consideration

Scoring / considering the SBE status of the lead bidder may increase the participation of smaller bidders in the solicitations (SDG&E, SCE)

RFI to Inform the RFP

In a one-stage solicitation, releasing an RFI before the RFP is an effective practice when needing market input to refine a solicitation's scope and to gauge third-party interests. (PG&E)

Hybrid Implementer Compensation Structures

Allowing hybrid compensation structures (deliverables-based payments & pay for performance/savings) is important for Implementers (especially smaller firms) and is necessary for meter-based programs (e.g., SEM, NMEC) where savings claims may be delayed more than a year after program launch and cash flow is needed to support program operations (SCE, SDG&E)

DISCUSSION

For anonymous questions:
Gillian.Weaver@cpuc.ca.gov

10 Minute Break

Start the Survey!

IOU Presentations

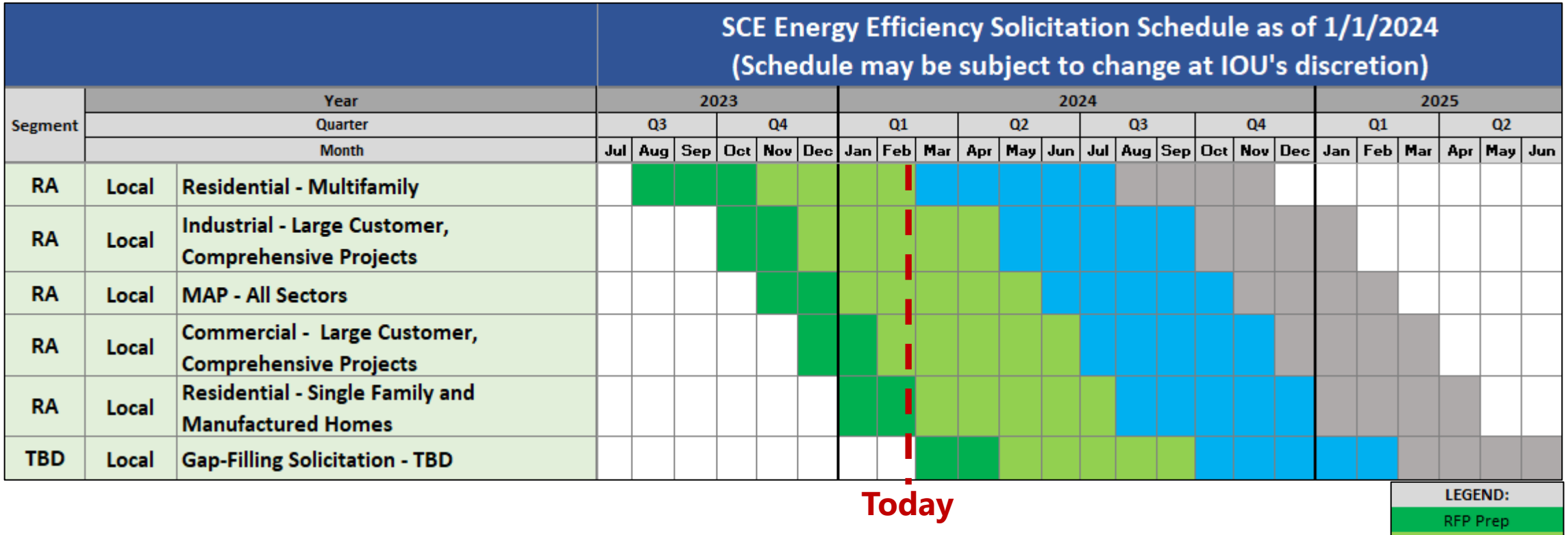
For anonymous questions:
Gillian.Weaver@cpuc.ca.gov

SCE Solicitations
EE Stakeholder Forum

February 29, 2024

SOUTHERN CALIFORNIA EDISON®

SCE Solicitation Schedule Updates



4 Solicitations in-flight:

- Residential Multifamily — Negotiations
- Industrial Large Customer — Evaluating Bids
- Market Access Program — Accepting Bids
- Commercial Large Customer — Accepting Bids

2 Upcoming Solicitations:

- Residential Single Family and Manufactured Homes
- Gap-Filling – Sector(s) and Segment(s) - TBD

SCE Process Improvements (Contract Changes)

- Improved cash flow for Implementers, establishing pay for (implementer-defined) deliverables.
- Reduced initial capital requirements and financial obligation with removal of Performance Assurance and Collateral.
- Improved flexibility in Offer Workbook, allowing bidders to submit a compensation model aligned with the proposal.
- Payment calculations simplified to align with Total System Benefit (TSB).

SCE Process Improvements (Other Changes)

- Added a Small Business Enterprise (SBE) adder to RFA/RFP valuation to encourage SBE participation.
- Solicitations are 1-stage by default, with use of 2-stage as appropriate.
- Co-Branding Opportunities.
- Account Manager support included for basic services.
- Revisited RFP solicitation materials with Independent Evaluator pool input.
- Increased Solicitation Marketing and Outreach activities.
- Streamlined Bidders' Conference.
- More targeted/specific feedback in Bidder debrief sessions; includes asking bidder for feedback.

EE 3PP STAKEHOLDER FORUM

February 29, 2024

SoCalGas™

2024 Solicitation Schedule

IOU	Year		2024											
	Quarter		Q1			Q2			Q3			Q4		
	Month		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
SoCalGas	Local - Residential Commercial	Market Access Program												
SoCalGas	Local - Commercial	WE&T Youth Outreach Program												
SoCalGas	Local - Residential	Innovation Design for EE Activities												

- ❑ Market Access Program for commercial and residential, a one -stage solicitation.
- ❑WE&T Youth Education Outreach, a one-stage solicitation.
- ❑The IDEEA 365 is a recurring competitive procurement process.
  - ❑In 2024, SoCalGas plans to release three separate IDEEA solicitations, a one-stage solicitation.

SoCalGas™

Glad to be of service.®

Solicitation Strategy Post 60%

- **SoCalGas plans to:**
  - renew or recompete when contract terms are up,
  - measure success and cost-effectiveness, and
  - retain diversity and growth of market players in the EE program.

- The activities necessary for establishing the structure to assure implementation plan compliance, includes preparing SoCalGas specific procedures utilized for contract performance review.
  - A Key Performance Index (KPI) reports are in place to control and monitor the program implementation details, scope, budget, and schedule.
  - SoCalGas along with its respective business partners validate the flow of information in an accurate and timely manner, for meeting the overall program implementation plan.
  - Variance explanations are provided based on established budgets, scope, schedule, and both parties are then asked to review the report.
  - Where appropriate, corrective action plans are put in place.

Solicitation Forecast

Solicitations Anticipated to Be Released if Determined to be Re-bid

2025	2026	2027
• Local - Residential Manufactured Housing • Local - Commercial Small & Medium Commercial • Local - Cross Cutting IDEEA365 • Local - Cross Cutting Behavioral • Statewide - Commercial Point of Sale Food Service • Statewide - Commercial Midstream Water Heating • Statewide - Cross Cutting Gas Emerging	• Local - Residential Single Family • Local - Residential Multifamily • Local - Commercial Large Commercial • Local - Public Public Sector • Local - Residential Multifamily Whole Building • Local - Cross Cutting Outreach • Local - Cross Cutting IDEEA365	• Local - Industrial Segment Solutions • Local - Cross Cutting IDEEA365 • Local - Cross Cutting Marketplace • Local - Cross Cutting Other Market Support Solicitations

Solicitation Process Improvements

- Distributed notes after each negotiation session.
- Utilized bidder interview sessions to clarify bidder proposal elements.
- Timely debriefing sessions – immediately following proposal
- Utilized excel based comment tracker during negotiation
- Revising the language in the RFP main document about SCG financial assessment process
- Implemented one-stage solicitation
- Increased participation of small bidders via IDEEA365 program, an ongoing offering to capture innovative new program proposals

2024 Energy Efficiency Third-Party Stakeholder Forum

February 29, 2024

SDG&E 2023 – 2025 Solicitation Schedule*

Year		2023												2024												2025			
Quarter		Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4			Q1			Q2
Month		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Local Commercial	Groceries, Restaurants, Food Storage														O														
Local Commercial	Private Institutions, Healthcare														O														
Local Commercial	Lodging														O														
Local Commercial	Retail, Offices and Wholesale														O														
Local Cross-Cutting	Market Access Program														O														

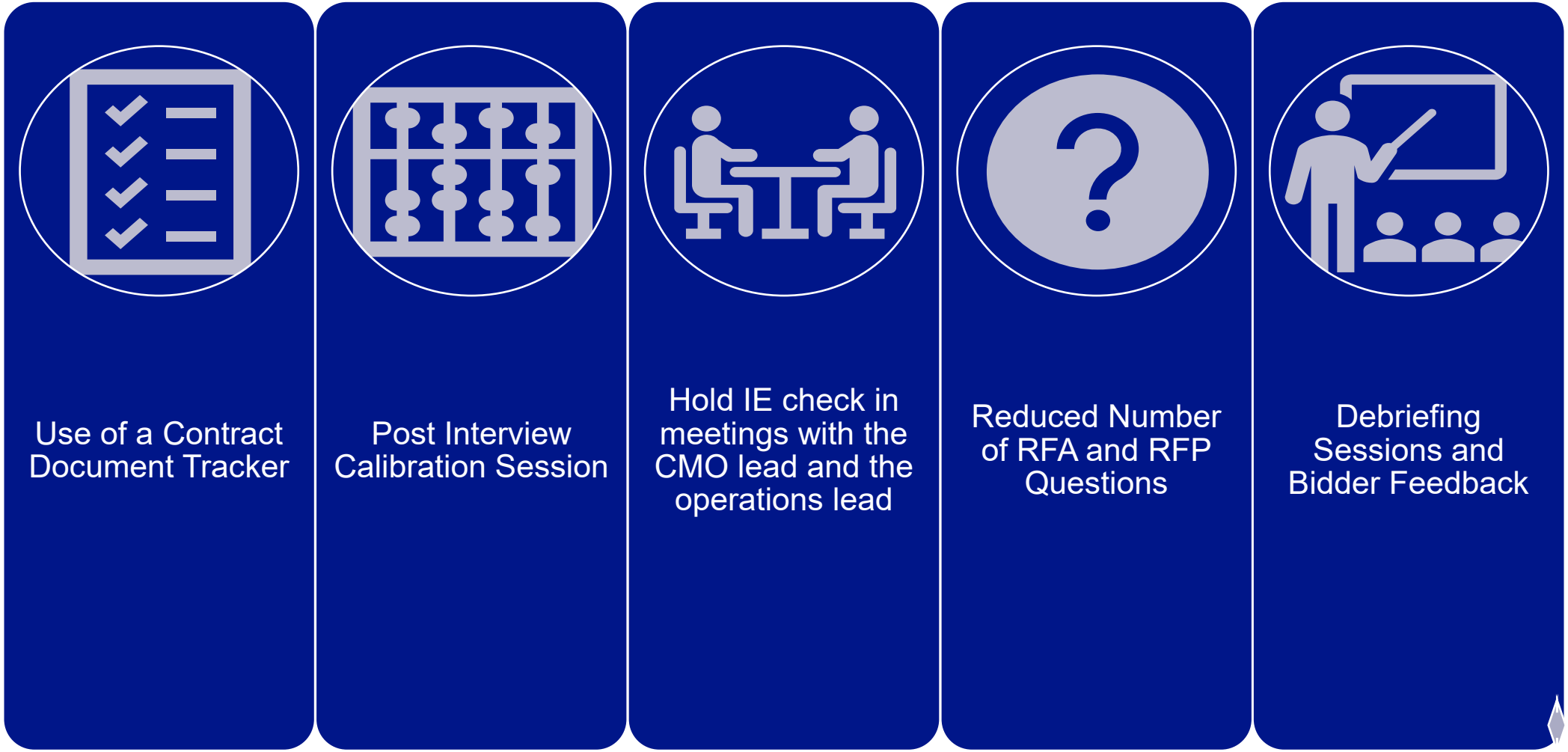
Legend:	
	RFA Prep
	RFA
	RFP Prep
	RFP
	Contract Negotiation
	AL (if applicable) + Approval + IP

Areas of focus:

- Getting the 4 new local commercial programs through the solicitation schedule
- Assessing programs with contract expirations in 2024 and 2025 (SF, MF, HVAC, PLA, Federal)
- Market Access Program RFP Prep to begin in March 2024
- All local commercial program solicitations will be 2-stage while MAP will be 1-stage

*Subject to change, pending any modifications and/or approvals from the Commission related to SDG&E's Energy Efficiency program administration.

SDG&E 2023 Process Improvements



PG&E Presentation to Third-Party Stakeholder Forum

February 29, 2024

Matthew Braunwarth – Manager, EE Procurement

Together, Building a Better California

2024 Solicitation Schedule

Year		2024											
	Quarter	Q1			Q2			Q3			Q4		
Portfolio Segment	Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Codes & Standards	SW CODES & STANDARDS ADVOCACY RFP - Wave 2	Contracting		AL		IP							
Codes & Standards	CODES & STANDARDS CODE READINESS RFP	Contracting				AL		IP					
Resource Acquisition	2024 SUMMER RELIABILITY PLATFORM ADMINISTRATOR RFP	Contracting				AL	IP						
Equity	ZONAL ELECTRIFICATION (Residential & Commercial) RFP	Contracting				AL		IP					
Equity	RESIDENTIAL ELECTRIFICATION EQUITY RFA/RFP	Contracting								AL		IP	
Market Support	RESIDENTIAL WHOLE HOME LOAD MANAGEMENT (ResCEO) RFP	RFP		Contracting							AL		IP
Resource Acquisition	COMMERCIAL ENERGY MANAGEMENT (SEM Expansion) RFP	RFP			Contracting						AL		IP
Market Support	RESIDENTIAL MARKET SUPPORT (Single Point-of-Contact) RFP	RFP	PREP	RFP			Contracting				AL		IP

PG&E has been focused on launching new programs in the areas of:

- Equity
- Electrification
- Load Management
- Summer Reliability
- SEM-Expansion
- Codes & Standards

Upcoming Solicitations:

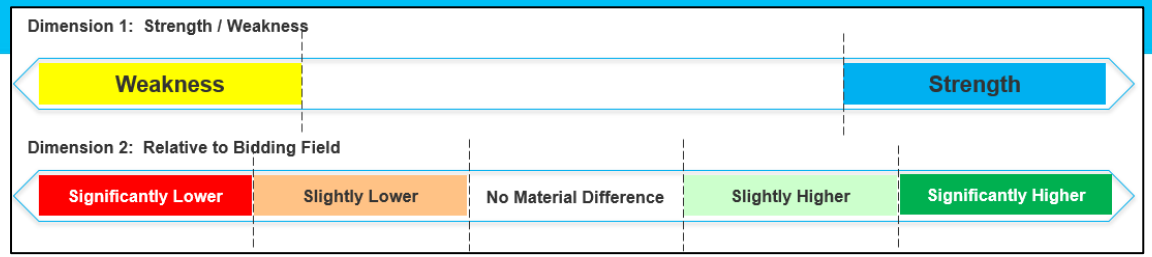
- Residential Single-Point-of-Contact

Potential Future Focus Areas:

- Customer Resiliency (Residential & Public)

Internal

Process Improvements



Maintaining Bidder Feedback Process:

- Continuing with 2-Factor Feedback Sessions
- Feedback provided on each scoring sub criteria
- Feedback offered to all participants in RFA (advancing and non-advancing)

Solicitation Process Improvements noted in recent IE Semi-Annual Report:

- RFI – Used Request for Information (RFI) to help inform future RFP design
- Background Info – Provided deeper context of new pilot program subject matter
- NMEC – Provided NMEC “Dos & Don’ts” in Bidder Conference
- Interview Prep – Improved internal team training for interviews

Focus Areas of Future Process Improvements:

- Simplify / Streamline / Shorten Contracting Process
- Continued focus on streamlining 1-Stage Process

Internal

Discussion

For anonymous questions:

Gillian.Weaver@cpuc.ca.gov

Lunch

Start the Survey!

Hob Issa, P.E. , Executive Vice President, hissa@lincus.com

Patsy Dugger, Director of Business Development,pdugger@aesc-inc.com

Siva Sethuraman, Sr. Director of Business Dev. & Innovation, siva.sethuraman@cascadeenergy.com

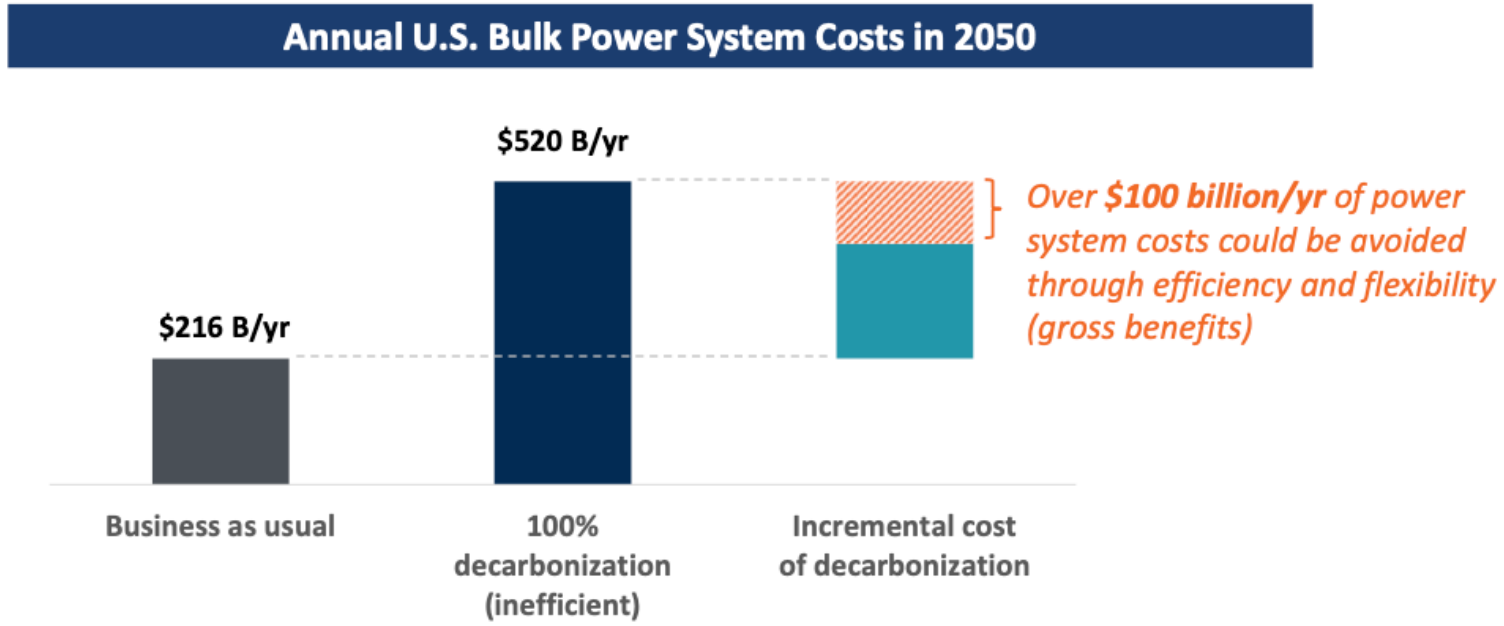
Global Energy Services, Inc.

Basu Mukherjee, P.E. , President, basu@gesusa.org

Implementer Panel

Improved affordability

Efficiency & flexibility could avoid hundreds of billions of dollars in power system costs. And consumers will spend less on new electric heating systems.



For more detail: https://buildings2050.lbl.gov/

Source: Presentation by Ryan Hledik: Principal at the Brattle Group at CEDMC's Fall Conference

10 Minute Break

Keep Filling Out the Survey!

IE Observations Panel

Richard Milward

MCR Performance Solutions, LLC

Don Arambula

don arambula consulting

Kim Crossman

GREAT WORK ENERGY

Elizabeth T. Lowe

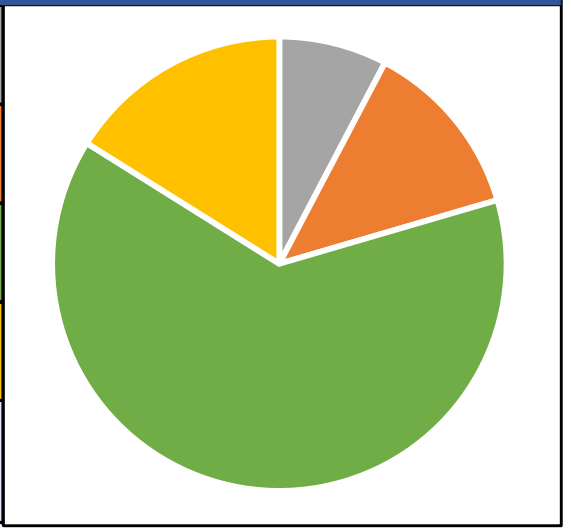
Barakat Consulting INCORPORATED

Diverse Business Enterprise Participation in Third-Party EE Solicitations and Implementation

Some Descriptive Statistics for Discussion

Proportion of Total Contract Amounts Expected to be Contracted to DBE Firms by IOUs

IOU	Contracts	Total Contract Amounts	DBE Primes*	Total DBE %†	Total DBE $‡	Relative IOU Total DBE $
PG&E	34	$409,444,771	2	8.8%	$35,897,259	7.7%
SDG&E	13	$292,610,254	2	20.3%	$59,531,545	12.8%
SCE	15	$885,401,716	2	33.4%	$295,622,167	63.4%
SoCalGas	29	$280,529,965	5	26.7%	$75,001,071	16.1%
Totals	**91**	**$1,867,986,706**	**11**	**24.9%**	**$466,052,042**	**100%**



Sources: Table C.2, IOU's Energy Efficiency Third-Party Solicitation Process Semi-Annual Independent Evaluators' Reports, December 2023.

* Number of programs with 100% of Total Contract Amount to be contracted to DBE firms.

† Percentage of IOU's Total Contract Amount expected to be contracted to DBE firms.

‡ Includes both prime and subcontractor DBE firms.

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DBE Firms as Prime Contractors – Third-Party EE Programs (Jan 2020 - Sept 2023)				
Prime DBE Contractors	**Certifications**	**Employees (Estimated)***	**IOUs**	**Contract Value**
California Retrofit, LLC	WBE	25	SDG&E	$10,501,926
Ecology Action	WBE	110	PG&E	$17,203,245
Energy Infrastructure Partners	MBE	20	SoCalGas	$4,882,770
Global Energy Services, Inc.	MBE	10	SCE	$4,275,000
			SoCalGas (2)	$5,694,250
Lincus, Inc.	WBE	25	SCE	$15,481,218
Okapi Architecture	MBE, WBE	6	SDG&E	$9,164,924
Richard Heath & Associates	MBE	260	SoCalGas (2)	$20,315,750
Strategic Energy Innovations	WBE	50	PG&E	$5,962,555
Prime DBE Totals			**11 Contracts**	**$93,481,638**
Totals – All IOUs			**91 Contracts**	**$1,867,986,706**
Prime DBE Totals as Proportions of All IOUs			**12.1%**	**5.0%**

Sources: Table C.2, IOU's Energy Efficiency Third-Party Solicitation Process Semi-Annual Independent Evaluators' Reports, December 2023.

* Estimated through various sources (Company websites, Business information sources, etc.).

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Keys to Success: Tips and Tactics for Bidders

Open Discussion and Audience Q&A

Roundtable

Thank you for your Participation!

- Please make sure to complete the survey so that we can effectively respond to your feedback
- To participate in the survey for this meeting, scan the QR code, click the link in chat, or use the URL below

https://docs.google.com/forms/d/e/1FAIpQLSeBticX2NhDCsvYNdg9lapYcEf6_sSCstEkW9LeUVIz4Y6WkA/viewform?usp=sf_link