

# PG&E's Participants' Webinar

## Distribution Investment Deferral Framework (DIDF) and Standard Offer Contract (SOC) Request for Offers



Together, Building  
a Better California

September 29, 2022



# Agenda

## Topics

Introduction and Safety

Distribution Services Needed

Solicitation Overview

- Eligibility
- Technology Neutral Pro-Forma
- Evaluation Methodology
- Incrementality
- Deferral Values

Offer Submittal Process

Offer Form

Intermission

Q&A

## Presenter

Sandy Burns

Kean Amidi-Abraham

Sandy Burns

Bev Moris

Bev Moris

Team



# Webinar Format

- We are will discuss public, non-confidential information only
- PG&E will not take questions during the presentation
- Participants should email questions on both SOC and DIDF RFOs to [DIDFRFO@pge.com](mailto:DIDFRFO@pge.com) during the presentation
  - Questions will be answered at the end of the webinar
  - PG&E might not address all questions during the Q&A portion of this webinar
  - After the webinar, PG&E will compile and post a Q&A document on PG&E's DIDF RFO website.
- PG&E will post a list of attendees on PG&E's website
  - If you do not want your name or the name of your company published, please send an email to [DIDFRFO@pge.com](mailto:DIDFRFO@pge.com) by October 3, 2022 at 5 PM (PPT)



# Webinar Disclaimers

- This presentation is intended to provide a summary of the information and requirements set forth in the RFO materials
- Participants should carefully review the 2022 DIDF and SOC Solicitation Protocols and all RFO materials available on PG&E's website
- To the extent that there are any inconsistencies between information provided in this presentation and the requirements in the RFO materials, the RFO materials published on PG&E's website shall govern



# Independent Evaluator (IE)

- Primary role of the IE is to:
  - Monitor RFO processes to ensure fair and equal treatment of all Participants
  - Monitor evaluation processes to ensure PG&E has implemented methodology as described and that offers are treated consistently
  - Report on RFO process and proposed transactions to CPUC when filed for CPUC approval
- The IE may review all Offer data and communications with Participants
- DIDF RFO IE is PA Consulting Group, Inc.



# Communications and Website

- RFO website provides everything you need to submit an Offer, including (but not limited to) the following:
  - RFO materials
  - Detailed instructions for submitting Offers(s) using Power Advocate and to the IE
  - Announcements, additional resources, and Q&A
- All solicitation communications should be directed to: [DIDFRFO@pge.com](mailto:DIDFRFO@pge.com) or [SOCPilotDIDF@pge.com](mailto:SOCPilotDIDF@pge.com) with a copy to the Independent Evaluator at [pge\\_ie@paconsulting.com](mailto:pge_ie@paconsulting.com)



# Customer Confidentiality

## 15/15 Rule:

PG&E follows aggregation and anonymization rules to respect and protect customer privacy

PG&E's interpretations and applications of the Commission's customer confidentiality aggregation standards comply with the aggregation standards for customer energy usage and personally identifiable information adopted in CPUC D.14-05-016 at pp. 26-27

As per CPUC D.14-05-016, redact if

one customer  
makes up >15%  
total  
consumption

**-OR-**

0 < residential  
customers  
downstream <  
100

**-OR-**

0 < non-  
residential  
customers  
downstream <  
15

**Redacted information is listed as "Customer Confidential" or "CC", or shown as a blank grey cell**



# Target Fall 2022 DIDF and SOC RFO Schedule

<b>Date/Time</b>	<b>DIDF Event</b>	<b>SOC Event</b>
<b>September 15, 2021</b>	PG&E issued RFO	PG&E issued RFO
<b>September 29, 2022</b>	Participants' webinar	Participants' webinar
<b>December 1, 2022</b>	Deadline for Participants to submit Offers via Power Advocate	
<b>December 15, 2022</b>		Deadline for Participants to submit Offers via Power Advocate
<b>December 22, 2022</b>	Participants Notified of Eligibility for Shortlisted Offer Negotiations	
<b>January 12, 2023</b>		Participants Notified PG&E intends to enter into contract
<b>Q1, 2023</b>	Negotiations	Contract Execution/Info Only Advice Letter
<b>Q2, 2023</b>	Contract Execution/Only Advice Letter	



# Distribution Services Needed



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# RFO Project Locations

Candidate Deferral	GNA Facility Name	In-Service Date
Camden 1106	Camden 1103	2025
	Hardwick Bank 1	
	Henrietta 1110	
	Schindler 1110*	
Old River Bank 2	Old River Bank 1*	2025
	Old River 1102	
	Old River Bank 2	
San Joaquin Bank 2	San Joaquin Bank 1	2025
	San Joaquin 1106	
	Stroud Bank 1*	

\* CUSTOMER CONFIDENTIAL due to their peak loads violating the 15-15 customer privacy rule





Camden 1103, Hardwick Bank 1, Henrietta 1110, and Schindler 1110\*

# **CAMDEN DEFERRAL OPPORTUNITY**



# Technical and Operational Requirements

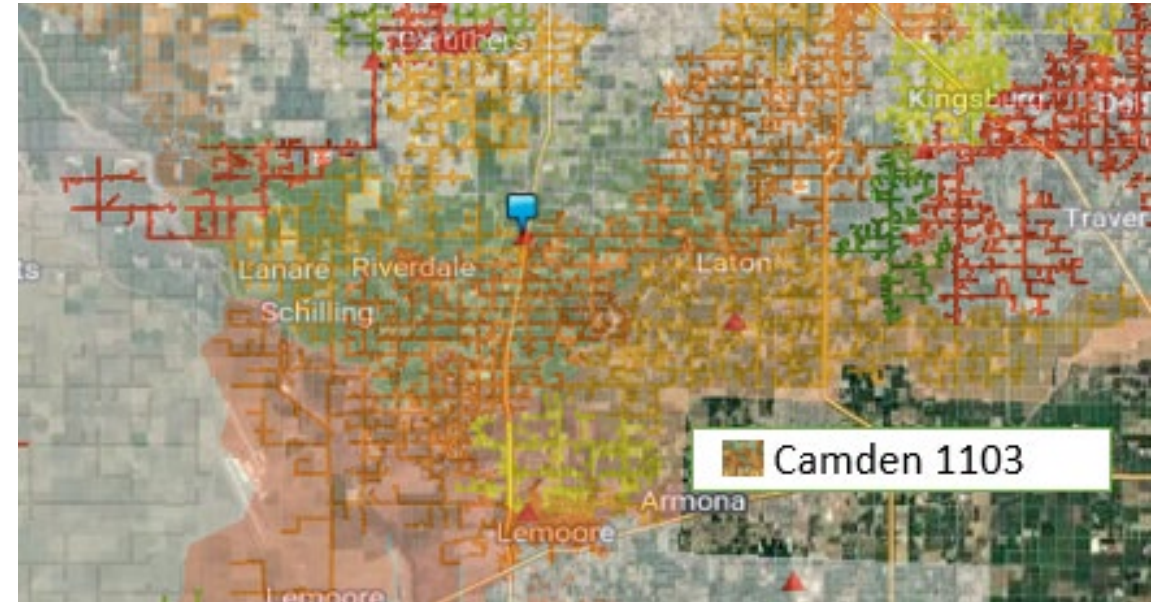
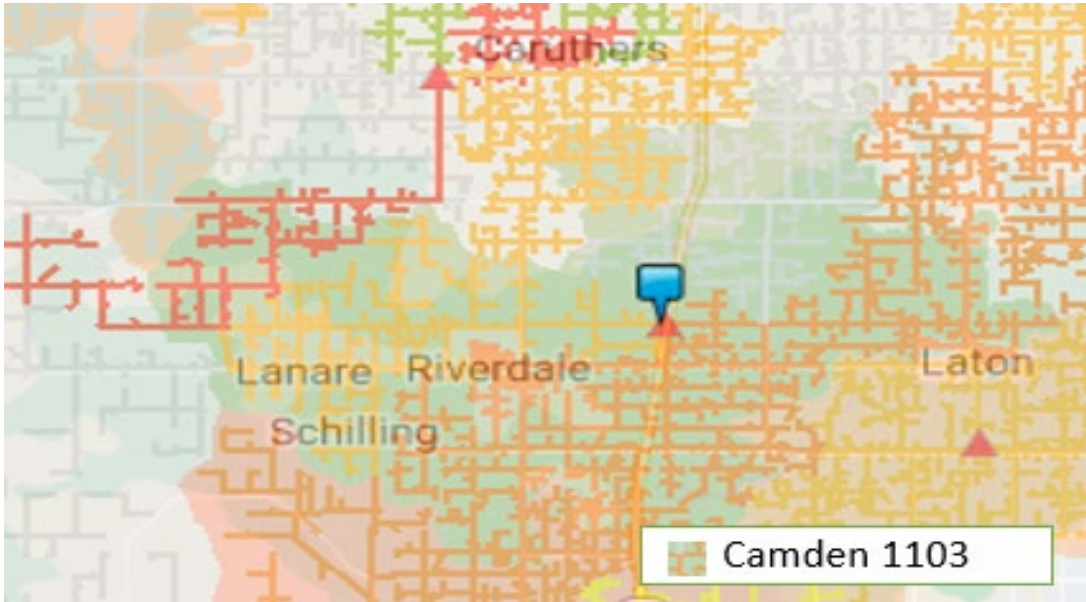
- 1.32 MW must be sourced at Camden 1103
- 2.25 MW must be sourced at Hardwick 1101 or Hardwick 1102
- 0.27 MW must be sourced at Henrietta 1110
- CC MW must be sourced at Schindler 1110 (see Appendix F2)

Candidate Deferral	Expected Performance and Technical Requirements									
	GNA Facility Name	In-Service Date	Requirement	Real Time (RT) or Day Ahead (DA)	Grid Need (MW)	Month	Delivery Days	Calls/Year	Hours	Duration (Hours)
Camden 1106	Camden 1103	2025	A	DA	1.32	6-8	Mon – Sun	61	6PM-10PM	4
	Hardwick Bank 1 • Hardwick 1101 • Hardwick 1102		B	DA	2.25	5-8	Mon – Sun	92	4PM-12AM	7
	Henrietta 1110		C	DA	0.27	6-8	Mon – Sun	74	3PM-11PM	5
	Schindler 1110		D	DA	CC	CC	CC	CC	CC	CC

# Camden 1103 Location Overview

## Location

Camden 1103, Fresno/Kings County

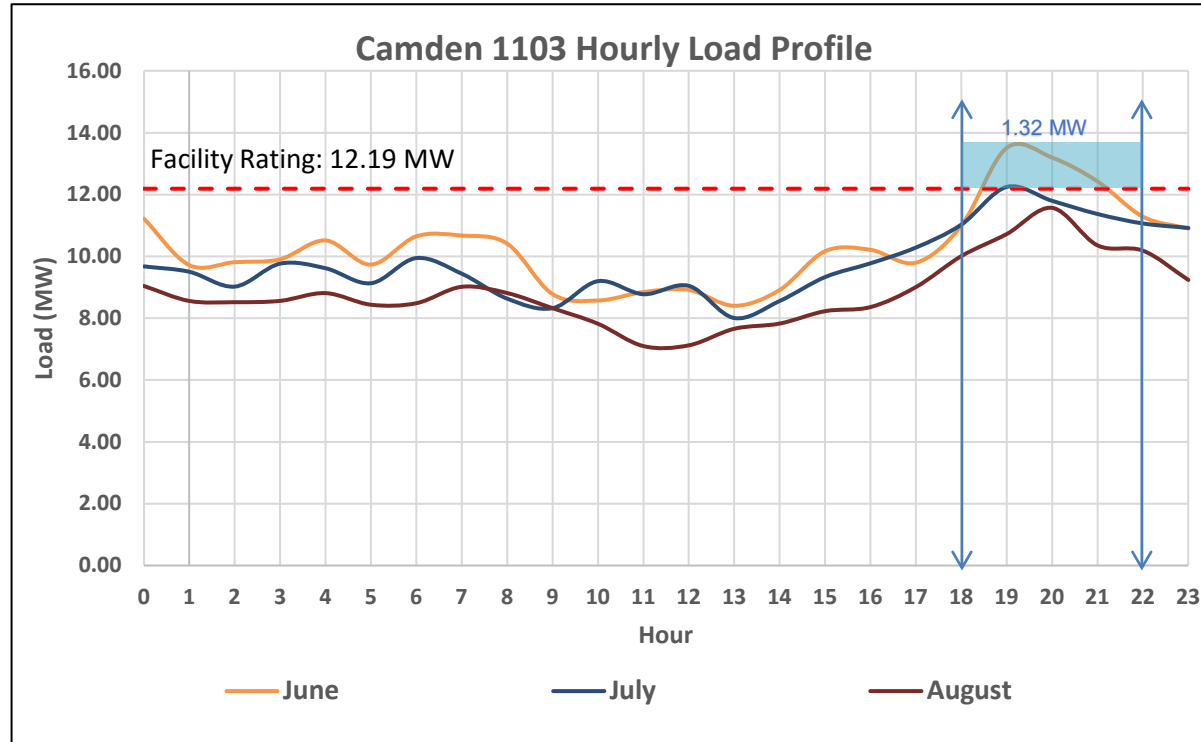


Candidate Deferral	GNA Facility Name	In-Service Date	Grid Need (MW)
Camden 1106	Camden 1103	2025	1.32
	Hardwick Bank 1 • Hardwick 1101 • Hardwick 1102	2025	2.25
	Henrietta 1110	2025	0.27
	Schindler 1110	2025	CC

- **Equipment:** Feeder 1103
- **Electrical Service:**
  - 12 kV feeder



# Technical and Operational Requirements

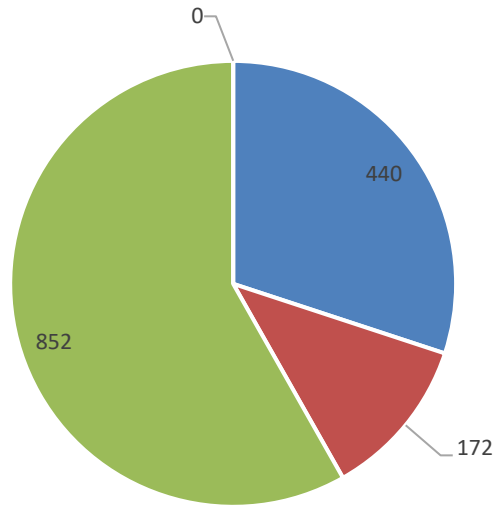


Candidate Deferral	GNA Facility Name	Requirement	Real Time (RT) or Day Ahead (DA)	Grid Need (MW)	Month	Delivery Days	Calls/Year	Hours	Duration (Hours)
Camden 1106	Camden 1103	A	DA	1.32	6-8	Mon – Sun	61	6PM-10PM	4

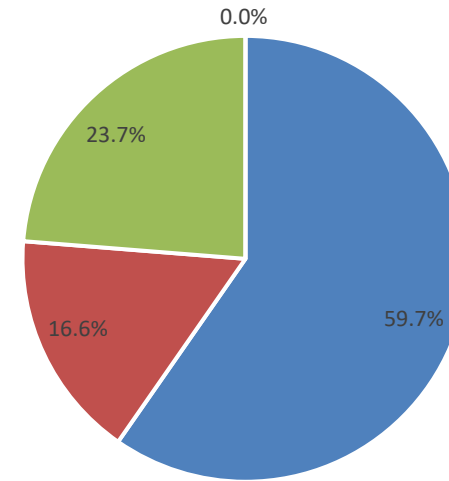


# Customer Composition – Camden 1103 (Peak Load Day – July 8th, 2021)

Customer Count



Peak Day Load by Customer Class (%)



■ Agricultural ■ Commercial/Industrial ■ Residential ■ Other

■ Agricultural ■ Commercial/Industrial ■ Residential ■ Other

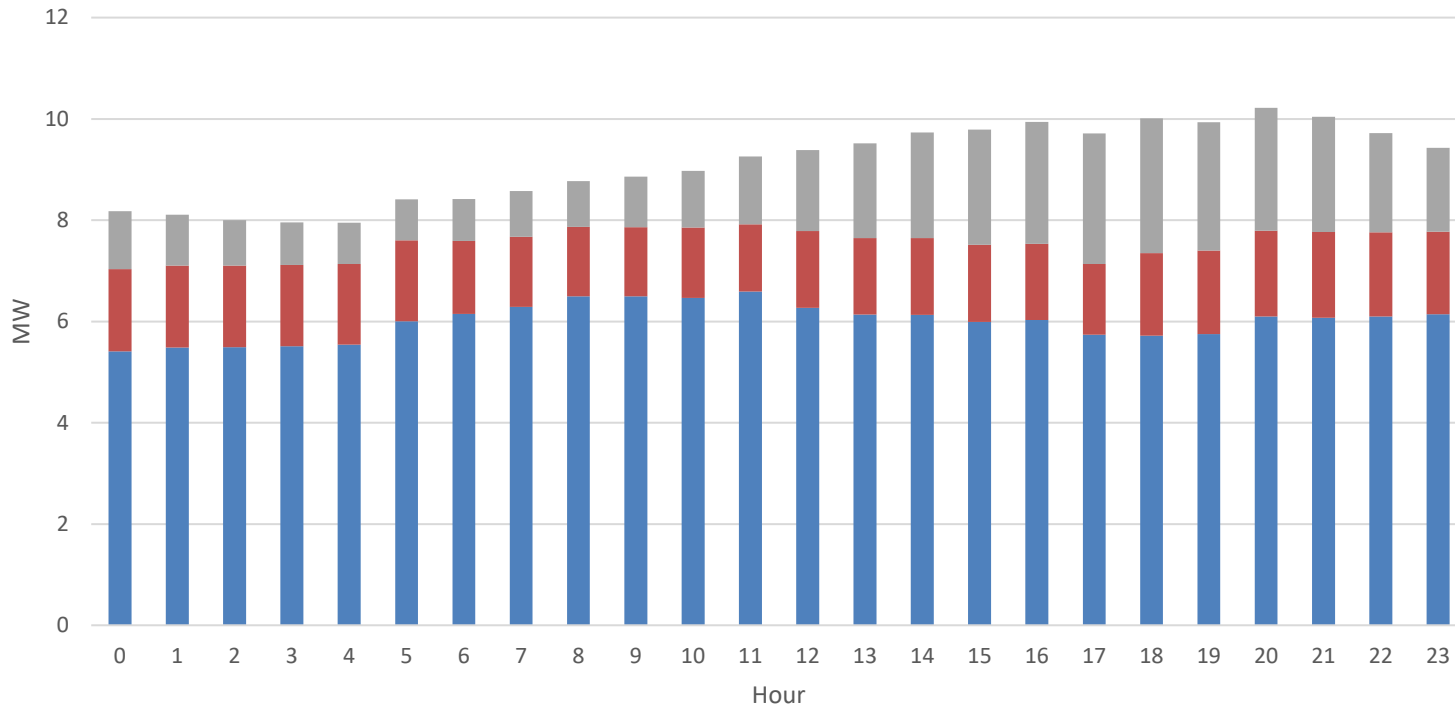
Customer Class	Total Customer Count	Peak Day Load (MW)
Agricultural	440	6.10
Commercial/Industrial	172	1.70
Residential	852	2.43
Other	0	0.00
<b>Total</b>	<b>1,464</b>	<b>10.22</b>

Public



# Load by Customer Class – Camden 1103 (Peak Load Day – July 8th, 2021)

Peak Day Hourly Load Profile by Customer Type



Historical 2021		
Observed Peak Load (MW)	Installed DERs	
	Solar PV (MW)	Mixed (MW)
10.22	5.4	0.02

■ Agricultural
 ■ Commercial/Industrial
 ■ Residential

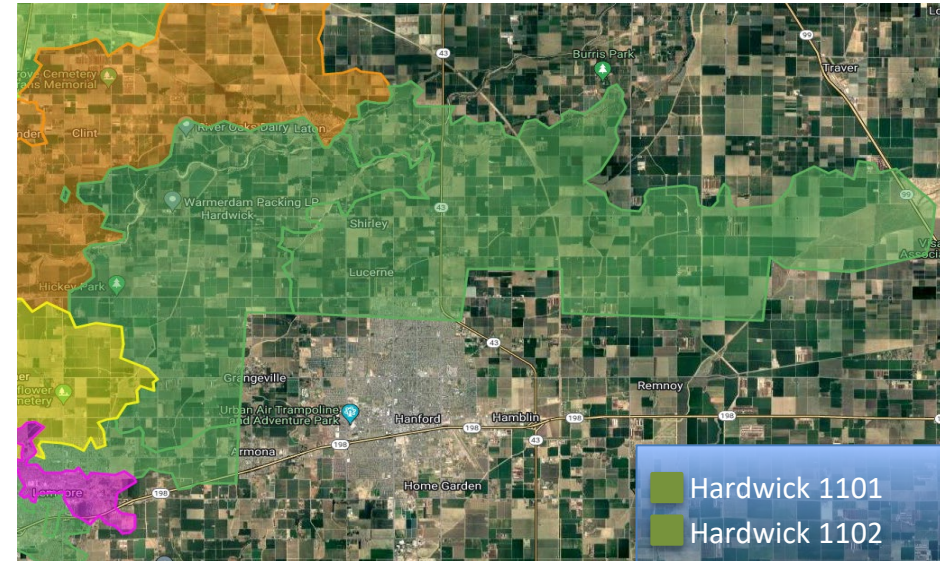
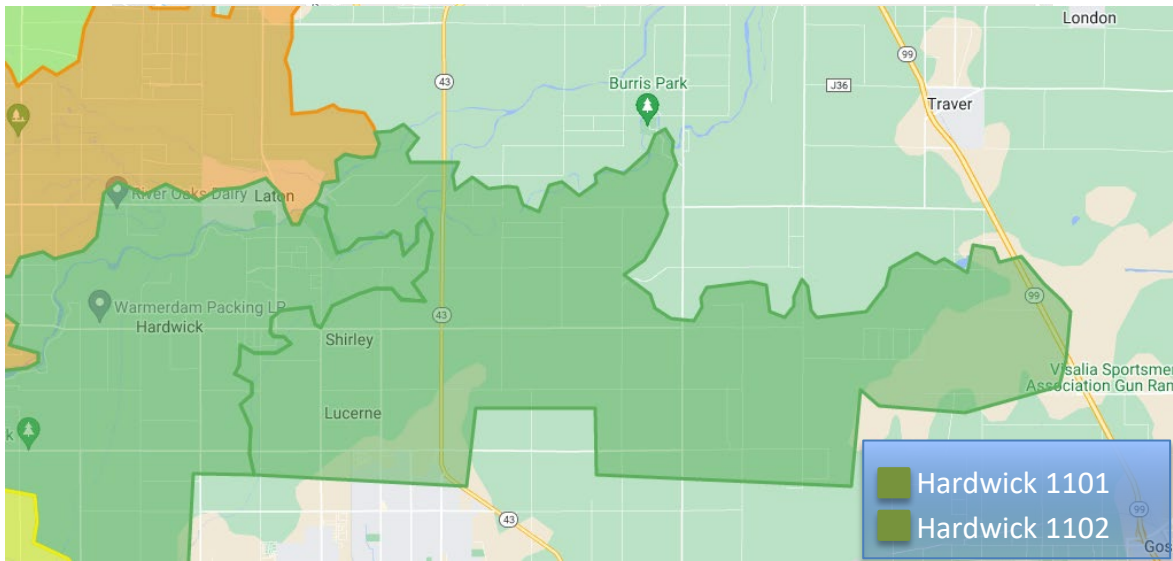




# Hardwick Bank 1 and Feeders Location Overview

## Location

Hardwick Bank 1, Fresno/Kings County

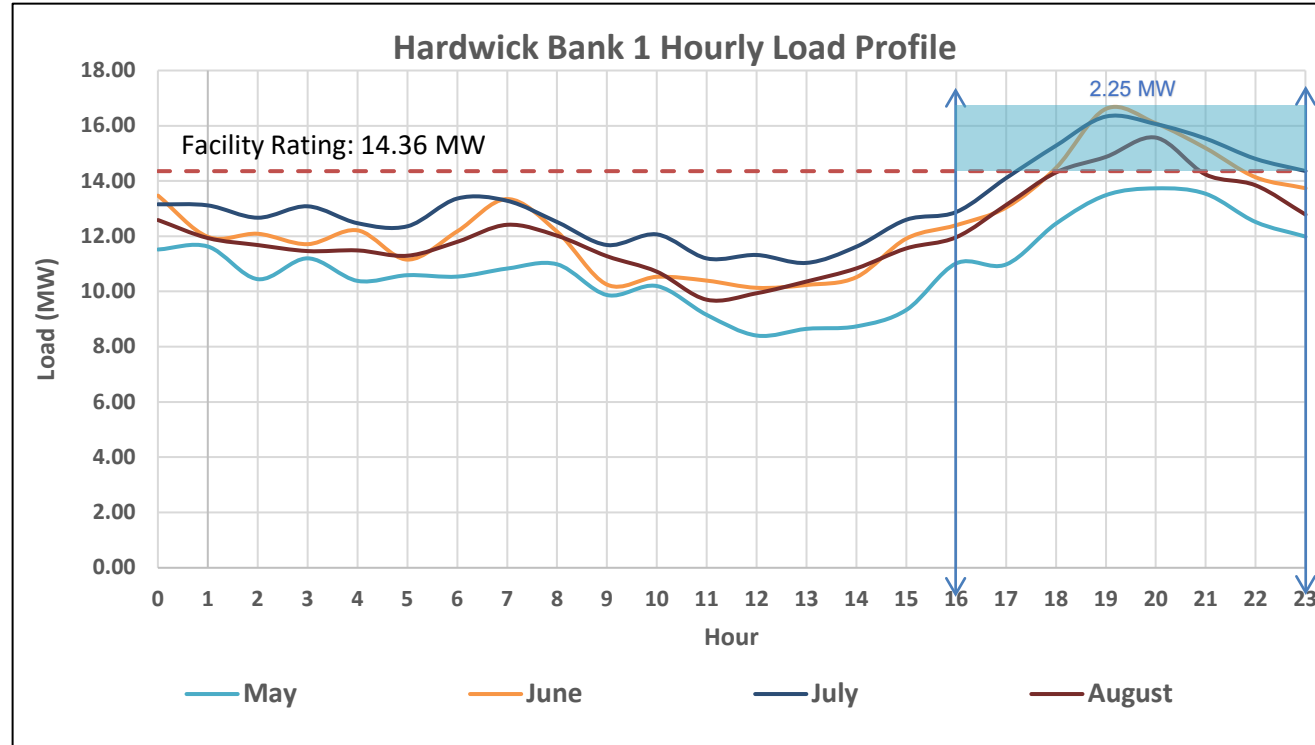


Candidate Deferral	GNA Facility Name	In-Service Date	Grid Need (MW)
Camden 1106	Camden 1103	2025	1.32
	Hardwick Bank 1 • Hardwick 1101 • Hardwick 1102	2025	2.25
	Henrietta 1110	2025	0.27
	Schindler 1110	2025	CC

- **Equipment:** Hardwick Bank 1 – Feeders 1101 and 1102
- **Electrical Service:**
  - 15.3 MVA bank with two 12 kV feeders



# Technical and Operational Requirements

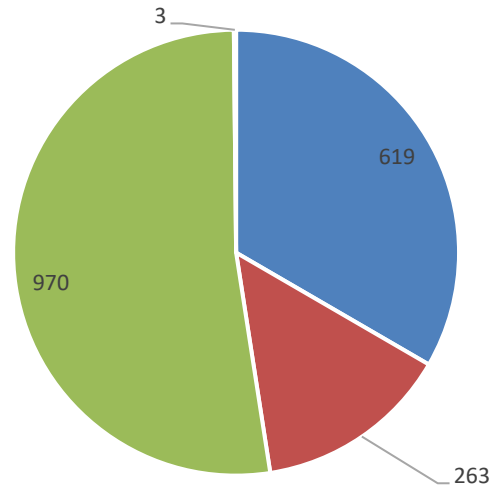


Candidate Deferral	GNA Facility Name	Requirement	Real Time (RT) or Day Ahead (DA)	Grid Need (MW)	Month	Delivery Days	Calls/Year	Hours	Duration (Hours)
Camden 1106	<u>Hardwick Bank 1</u> • Hardwick 1101 • Hardwick 1102	B	DA	2.25	5-8	Mon – Sun	92	4PM-12AM	7

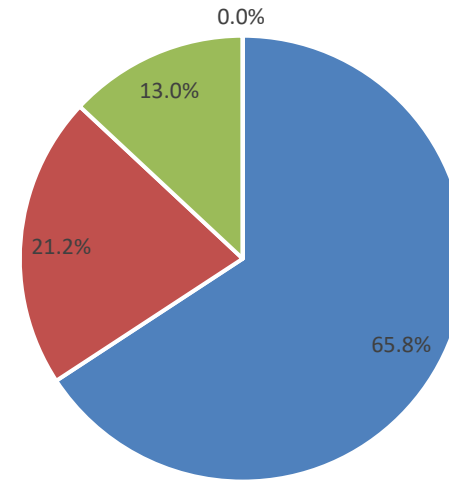


# Customer Composition – Hardwick Bank 1 (Peak Load Day – August 4th, 2021)

Customer Count



Peak Day Load by Customer Class (%)



■ Agricultural ■ Commercial/Industrial ■ Residential ■ Other

■ Agricultural ■ Commercial/Industrial ■ Residential ■ Other

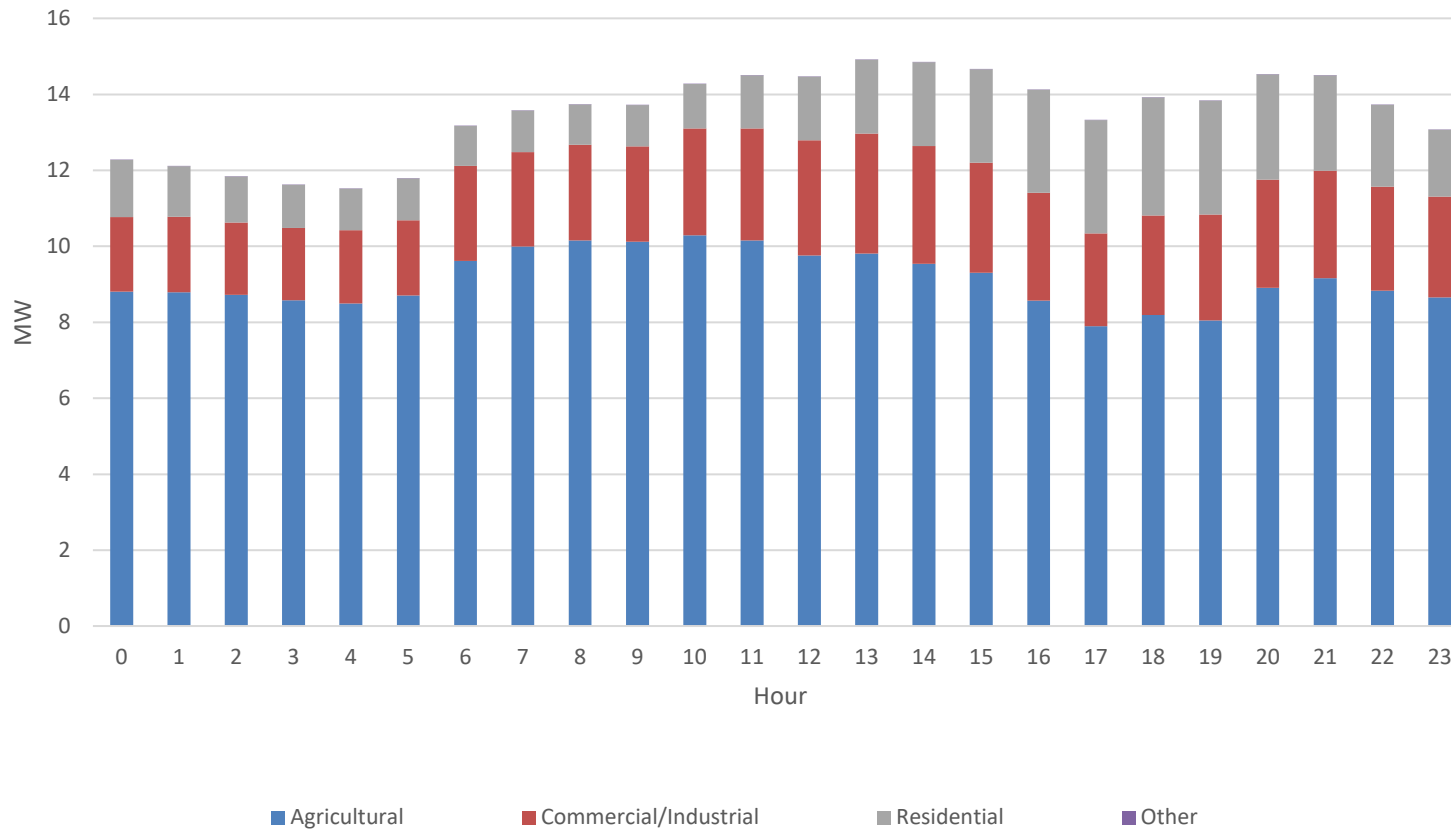
Customer Class	Total Customer Count	Peak Day Load (MW)
Agricultural	619	9.81
Commercial/Industrial	263	3.16
Residential	970	1.95
Other	3	0.00
<b>Total</b>	<b>1,855</b>	<b>14.92</b>

Public



# Load by Customer Class – Hardwick Bank 1 (Peak Load Day – August 4th, 2021)

Peak Day Hourly Load Profile by Customer Type

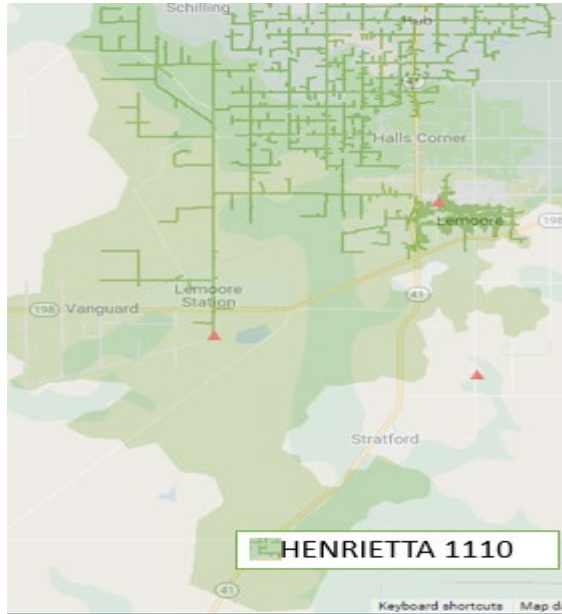


Historical 2021		
Observed Peak Load (MW)	Installed DERs	
	Solar PV (MW)	Mixed (MW)
14.92	6.73	0.02

# Henrietta 1110 Location Overview

## Location

Henrietta 1110, Fresno/Kings County

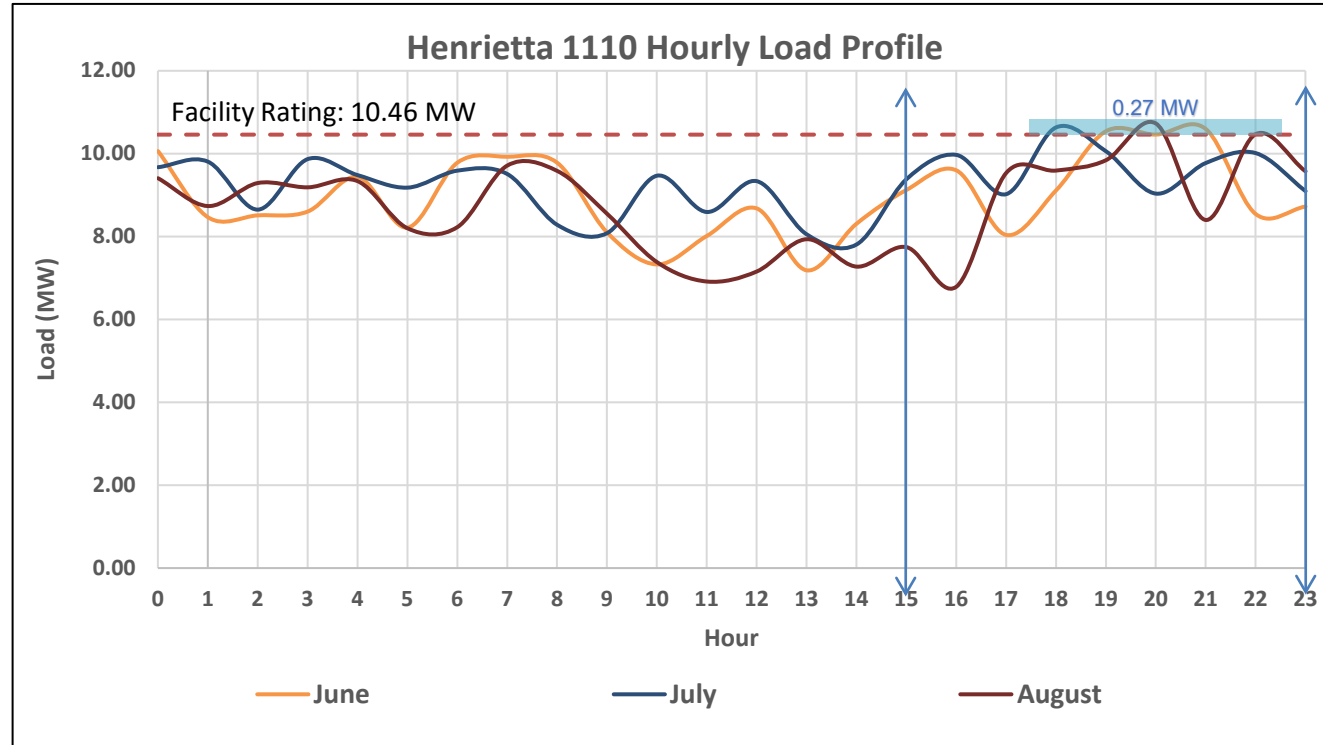


Candidate Deferral	GNA Facility Name	In-Service Date	Grid Need (MW)
Camden 1106	Camden 1103	2025	1.32
	Hardwick Bank 1 • Hardwick 1101 • Hardwick 1102	2025	2.25
	Henrietta 1110	2025	0.27
	Schindler 1110	2025	CC

- **Equipment:** Feeder 1110
- **Electrical Service:**
  - 12 kV feeder



# Technical and Operational Requirements

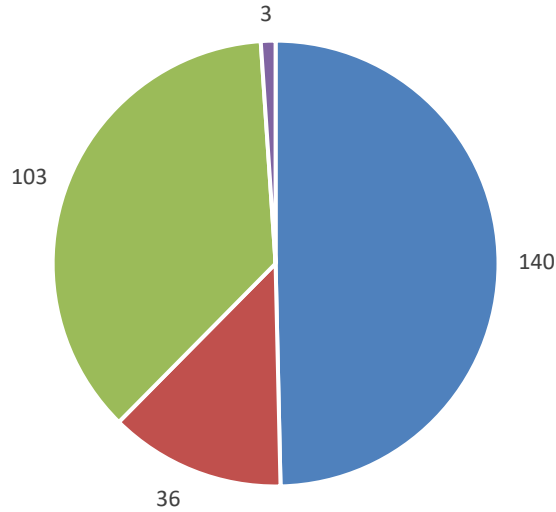


Candidate Deferral	GNA Facility Name	Requirement	Real Time (RT) or Day Ahead (DA)	Grid Need (MW)	Month	Delivery Days	Calls/Year	Hours	Duration (Hours)
Camden 1106	Henrietta 1110	C	DA	0.27	6-8	Mon – Sun	74	3PM-11PM	5

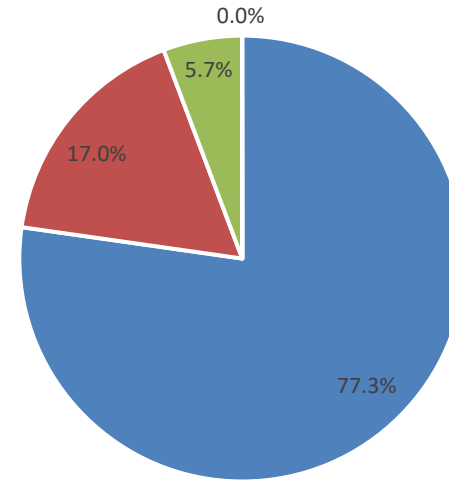


# Customer Composition – Henrietta 1110 (Peak Load Day – July 30th, 2021)

Customer Count



Peak Day Load by Customer Class (%)



■ Agricultural ■ Commercial/Industrial ■ Residential ■ Other

■ Agricultural ■ Commercial/Industrial ■ Residential ■ Other

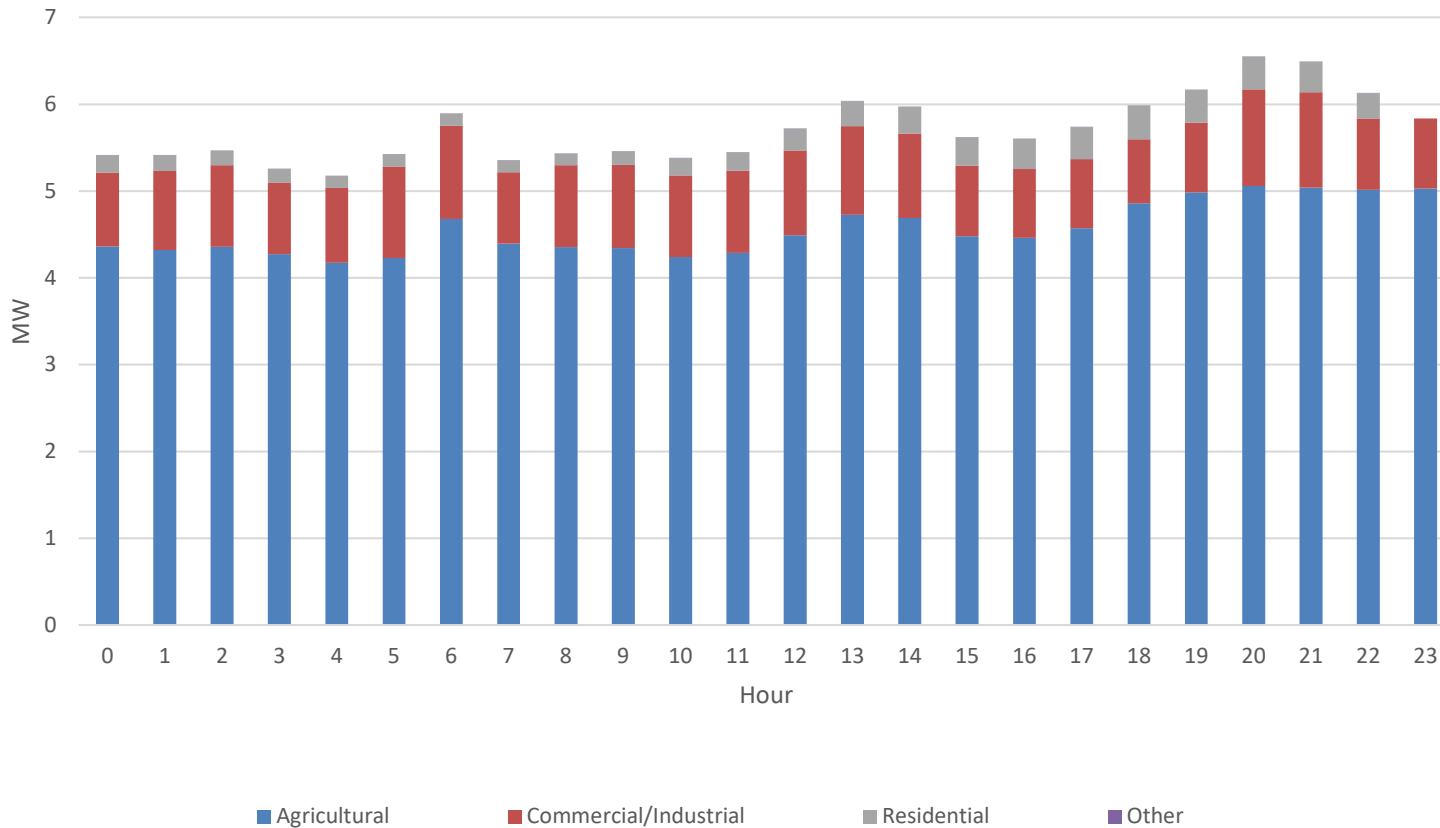
Customer Class	Total Customer Count	Peak Day Load (MW)
Agricultural	140	5.06
Commercial/Industrial	36	1.11
Residential	103	0.37
Other	3	0.00
<b>Total</b>	<b>282</b>	<b>6.55</b>

Public



# Load by Customer Class – Henrietta 1110 (Peak Load Day – July 30th, 2021)

Peak Day Hourly Load Profile by Customer Type



Historical 2021		
Observed Peak Load (MW)	Installed DERs	
	Solar PV (MW)	Mixed (MW)
6.55	1.763	0.00





# SOC Project Locations

Candidate Deferral	GNA Facility Name	In-Service Date
Blackwell Bank 1	Blackwell Bank 1*	2025

\* CUSTOMER CONFIDENTIAL due to their peak loads violating the 15-15 customer privacy rule





# Technical and Operational Requirements

- A combined ~1 MW on Blackwell Bank 1 is required
- Expected delivery term: During the spring
- Hourly Range starts in the morning and ends in the evening
- Hours Duration is approximately 8 hours

Candidate Deferral	Expected Performance and Technical Requirements									
	GNA Facility Name	In-Service Date	Requirement	Real Time (RT) or Day Ahead (DA)	Grid Need (MW)	Month	Delivery Days	Calls/Year	Hours	Duration (Hours)
Blackwell Bank 1	<u>Blackwell Bank 1</u> <ul style="list-style-type: none"> <li>• Blackwell 1102</li> <li>• Blackwell 2101</li> </ul>	2025	A	DA	~1	CC	CC	CC	CC	CC

# DIDF and SOC Solicitation Overview



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# RFO Design-Eligibility (1/3)

	DIDF RFO	SOC
Project Eligibility	Projects must be located at identified grid location (s)	Projects must be located at identified grid location
Technology	All technologies that can meet grid need	Front of the meter technologies that can meet grid need
Aggregation	Participants may offer one resource or an aggregation	N/A- for front of the meter
Offer size	Up to 200% of grid need; if offer 200%, an offer for 100% must also be submitted	Up to 120% of grid need
Number of offers	No limit on number of offers	One offer Only
Preferred Offer Size	<b>To the extent that a Participant is able to, each Participant is encouraged to submit at least one Offer that addresses the entire combined need at each Grid Need Location</b>	<b>To the extent that a Participant is able to, each Participant is encouraged to submit an Offer that addresses the entire need</b>



# RFO Design (2/3)

- **Measurement and verification**
  - Participants must include a measurement and verification plan with their offers
  - Behind the meter Projects using a baseline methodology may require a customized approach
- **Interconnection**
  - Project must connect to specified lines/feeders; **Some DIDF locations require more specific points of interconnection along the feeder**
  - No specific interconnection milestone required, but Participants must demonstrate they can meet the online date
- **Double payments/double counting**
  - Projects must be fully or partially incremental to PG&E's programs, tariffs, and solicitations
  - Participants must submit Appendix B Section 5 of the RFO materials to demonstrate how their Offer is incremental
  - Energy efficiency Participants may choose to have their Offer evaluated for incrementality on a project-specific basis or having their Offer evaluated based on a pre-specified overlap factor
  - All other resources must go through the project-specific review process



# RFO Design (3/3)

Participants must demonstrate how Projects are incremental:

Resources can be:		Examples
Fully Incremental	Not already sourced through another program, tariff, solicitation	<ul style="list-style-type: none"><li>• Add-on's to existing DERs, such as the addition of dispatchable storage to an existing PV resource</li><li>• New programs;</li><li>• EE Technology not included in Portfolio</li></ul>
Partially Incremental	Partially sourced through another program, tariff, solicitation	Enhanced uptake of DER over base
Not Incremental	Wholly sourced through another program, tariff, solicitation	Rooftop PV compensated under NEM without enhancement; Existing DG or ES compensated under SGIP without enhancement; EE or DR portfolio resources without enhancement

# Technology Neutral Pro Forma (TNPF) Overview



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# Transaction

- Product: Distribution Services in accordance with Operating Parameters
  - Increase/decrease load or increase/decrease generation during specified hours, which vary by location
  - Sellers are free to monetize other revenue streams
  - Seller is free to operate the resource how it wants outside of the Delivery Day
- Seller commits to provide Product at Contract Quantities
  - Seller may sell excess amount of Product from Project to third parties
  - Seller may sell other attributes of the Project to third parties
- Sellers will be instructed on whether they are required to provide distribution capacity by 8 am day-ahead
  - Project may be dispatched at the Buyer's discretion up to the Contract Capacity
  - Seller will provide PG&E with real-time visibility into DER performance
  - Sellers are required to install a communications system and equipment for PG&E to be able to remotely monitor Project status on an aggregate and individual unit basis





# Payment and Delivered Energy

- Compensation formula has been relaxed from 2021 TNPf based on 2021 negotiations
- Compensation:
  - Fixed price (\$/kW-month)
- Compensation is dependent on delivery of services when called:
- $\text{Contract Capacity} * \text{Contract Price} * \text{Ratio Delivered Services when called} * \text{Delivered Services Adjustment}$

Delivered Services	Delivered services adjustment
$\geq 0.90$ and $\leq 1.00$	1.0
$\geq 0.75$ and $< 0.90$	0.5
$< 0.75$	0



# BTM- Project Site and Customers

- Sellers are solely responsible for acquiring Customers and responsible for all marketing activities
- Sellers may remove or replace Sites/Customers, provided that changes are in accordance with safety provisions
- Seller must provide PG&E a list of Customers and satisfy incrementality criteria prior to Initial Delivery Date
  - Changes to initial Customer list must continue to satisfy incrementality criteria
- Seller must provide aggregate and individual site operational data



# Performance Assurance

## Performance Assurance

- “Project Development Security” is due to PG&E within ten (10) business days of contract execution and must be in the form of a letter of credit or cash and in the following amounts:
  - \$40/kW for all resources
- “Delivery Term Security” is due to PG&E before the Initial Delivery Date and will be held by PG&E throughout the delivery term
  - \$40/kW
  - Seller may apply Project Development Security toward the Delivery Term Security

## Damage Payment/Termination Payment

- In an event of default, defaulting party will owe non-defaulting party an amount equal to the performance assurance



# Conditions Precedent

- Initial Delivery Date shall not occur until Seller:
  - Has constructed the Project and provided certification from an independent engineer that Project is commercially operable and constructed in accordance with the safety requirements
  - Has passed an initial Performance Test demonstrating that the Project is capable of delivering Distribution Service
  - Has provided PG&E with a list of Sites and Customers and PG&E has verified that such Sites/Customers are incremental (BTM only)
  - Has provided Delivery Term Security
  - Seller has submitted safety attestation



# Events of Default and Early Termination

## Early Termination

- Seller may terminate contract early if interconnection study results are not received or if they indicate interconnection costs are beyond a prespecified threshold.
- Early termination must be exercised in time for PG&E to execute contingency plan
- Seller subject to reduced damage payment.

## Events of Default

- Failure to meet two Critical Milestones
- Failure to meet Initial Delivery Date
- Monthly Distribution Services Factor averages less than 80% for any calendar year
- Results of Performance Test shows that the Project provides less than 85% of Contract Capacity

# Evaluation Methodology



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# Evaluation Criteria: Least Cost, Best Fit

- **Quantitative Factors**
  - Benefits (Distribution Deferral Value)
  - Contract Payments
- **Qualitative Factors**
  - Project Viability
    - Interconnection
    - Site Control Assessment
    - Developer Experience
    - Technology Viability
  - Ability to provide full need
  - Renewable vs. non-renewable
  - Technology, Counterparty Concentration
  - Supply Chain Responsibility
  - Safety



# Distribution Deferral Values

The distribution deferral values represent the net present value of deferring the annual revenue requirement associated with the traditional distribution investment.

- **DIDF Deferral Values**

- Camden 1106: \$11,307,514
- Old River Bank 2: \$4,435,555
- San Joaquin Bank 2: \$8,708,319

- **SOC Deferral Values**

- Blackwell Bank 1: \$2,887,108



# Offer Submittal Process



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# Offer Submittal

- Offers must be submitted via the online platform at Power Advocate. Only accepted registrants are permitted to submit Offers. Links for Power Advocate registration are provided on the websites. PG&E strongly encourages you to register well in advance of Offer due dates:
  - **December 1, 2022 at 5:00 PM (PPT) for DIDF RFO**
  - **December 15, 2022 at 5:00 PM (PPT) for SOC Pilot**
- PG&E will only consider Offers that, as of the submittal deadline, are complete and conforming Offers.
- Participants may submit multiple offers/offer variants for the 2022 DIDF RFO.
- Participants may submit only one offer for the 2022 SOC Pilot.



# Required Offer Submission Forms

Offer package(s) must be in the format as specified in the Protocol documents for the:

## **Fall 2022 DIDF RFO:**

- Introductory Letter. Format: PDF
- Appendix A1 and/or A2\*: Fully Completed Offer Form. Format: MS Excel
- Appendix B: Supplemental RFO Document. Format: PDF

## **2022 SOC Pilot:**

- Appendix A\*: Fully Completed Offer Form. Format: MS Excel
- Appendix B: Supplemental SOC Pilot Document. Format: PDF
- Appendix E: Completed TNPF Contract. Format: MS Word

\*In order to access these offer forms, a signed NDA (Appendix C) is required.

*Note: Incomplete documentation will require additional communication to resolve any issues.*

# Offer Form



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# Offer Form Documents

## DIDF RFO

### Appendix A1

- Offer Form for the Camden 1103, Hardwick Bank 1, Henrietta 1110, Old River 1102, Old River Bank 2, San Joaquin Bank 1 and San Joaquin 1106 deferral opportunities

### Appendix A2

- Offer Form for Schindler 1110, Old River Bank 1 and Stroud Bank 1 opportunities

These opportunities include confidential load information. In order to receive this offer form, please submit a completed and executed NDA (Appendix C).

## SOC Pilot

### Appendix A

- Offer Form for Blackwell Bank 1 opportunity

This opportunity include confidential load information. In order to receive this offer form, please submit a completed and executed NDA (Appendix C).



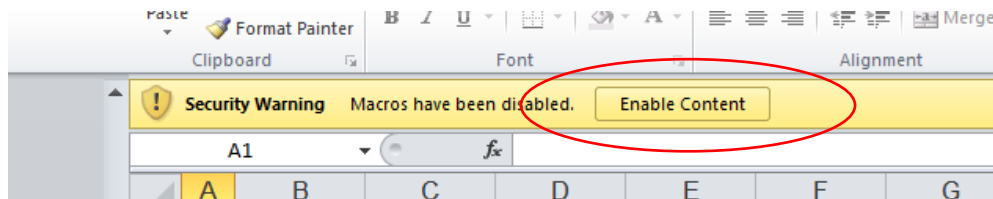
# Offer Form Structure

Offer forms are similar, but the SOC offer form is streamlined - It includes only one location, and allows only one offer variant.

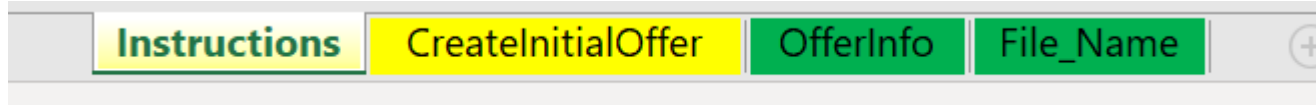
	DIDF - RFO	SOC
Instructions	✓	✓
Create Offer	✓	✓
Select Deferral Opportunity	✓	
Select Grid Need Location	✓	
Participant Information	✓	✓
Attestations	✓	✓
Project Information	✓	✓
Pricing	✓	✓
Offer Size Flexibility	✓	
File Name	✓	✓

# Offer Form – Instructions

- Be sure to ENABLE CONTENT when opening the offer form.



- Instruction tab provides clear directions on completing the offer form.

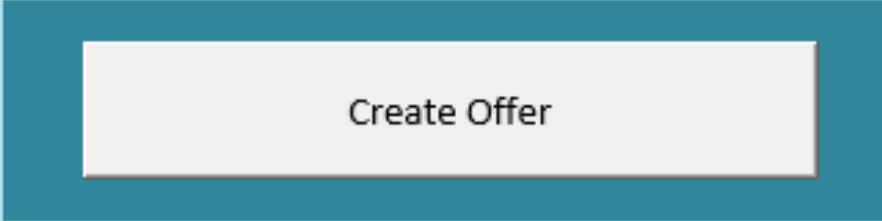


- Complete Offer by moving from tabs at sheet bottom from left to right.
- Please make sure you save often and submit the form in Microsoft Excel “.xlsb” format.  
**No other formats will be accepted.**

# Offer Form – Create Offer

Participants can submit offers for a grid need location by selecting the “Create Offer” button in the ‘**CreateInitialOffer**’ tab at the bottom. More than one offer may be submitted for each deferral opportunity in your offer package. Only one offer can be created per offer form.

To begin assembling an offer package click the "Create Offer" button.



Create Offer





# Offer Form – Select Deferral Location

Select the Deferral Opportunity you would like to make an offer for from one of the drop-down lists

Select Grid Need Location ×

Deferral Opportunity:

**Note:** A new offer form will need to be saved when creating a new variant for an offer or an offer for a different Grid Need Location.



# Offer Form – Select Offer Location

1. Input the MW amount for the location at which you would like to make an offer.

2. Click the radio button to right of the grid option for the offer you would like to create.

3. Once chosen, click on the “Create” button to begin entering offer information.

Select Grid Need Location ×

Deferral Opportunity:

Deferral Need	Grid Need Location	Requirement	Real Time (RT) or Day Ahead (DA) Dispatch	Grid Need (MW)	Delivery Month Range	Calls / Year	Delivery Hour Range	Hours Duration	Delivery Day Range	Online Year	Deferral Term (Years)	Months Paid	Select Option Here
Camden 1106	Camden 1103	A	DA	1.32	Jun-Aug	61	6PM-10PM	4	Mon-Sun	2025	7	3	<input type="radio"/>
Camden 1106	Hardwick Bank 1	B	DA	2.25	May-Aug	92	4PM-12AM	7	Mon-Sun	2025	7	4	<input type="radio"/>
Camden 1106	Henrietta 1110	C	DA	0.27	Jun-Aug	74	3PM-11PM	5	Mon-Sun	2025	7	3	<input type="radio"/>
													<input type="radio"/>
													<input type="radio"/>



# Offer Form – Offer Info

Clicking the ‘OfferInfo’ tab will open this vertical offer form. All offer information will start at the top and work down in a single column.

DIDF RFO Offer Form Version: 2022.01		BASE OFFER
	BidID:	NA
	<input type="button" value="Add Variant"/>	
		A
OFFER BASE DATA		
Deferral Need		Camden 1106
Grid Need Location		Camden 1103
Requirement		A
Real Time (RT) or Day Ahead (DA) Dispatch		DA
Grid Need (MW)		1.32
Delivery Month Range		Jun-Aug
Calls/Year		61
Delivery Hour Range		6PM-10PM
Hours Duration		4
Delivery Day Range		Mon-Sun
Online Date		2025
Deferral Term (Years)		7
Months Paid		3

If desired, click the ‘Add Variant’ button in the center and a column B will appear to the right of column A.



# Offer Form – Participant Info

PARTICIPANT INFORMATION	
Counterparty/Legal Entity Name	
Street Address	
City	
State	
Zip Code	
Country	
Website	
<b>Authorized Contact #1: First Name</b>	
Last Name	
Title	
Phone 1	
Phone 2	
Email	
<b>Authorized Contact #2: First Name</b>	
Last Name	
Title	
Phone 1	
Phone 2	
Email	
<b>Developer/Legal Entity Name (may be same as Participant)</b>	
Street Address	
City	
State	
Zip Code	
Country	
<b>Owners of Participant Entity or Project</b>	
Name 1	
Ownership %	
Website URL	
Name 2	
Ownership %	
Website URL	
Name 3	
Ownership %	
Website URL	
Ownership Notes	
<b>Total Ownership Percent</b> 0	



# Offer Form – Project Information

PROJECT INFORMATION	
<b>Agreement Type</b>	Technology Neutral Profoma Agreement
Technology Type	
Should this Offer be evaluated for incrementality on a project-specific basis or should it be evaluated based on a pre-specified overlap factor?	<---- Only applicable if "Behind the Meter - Energy Efficiency" Technology Type is chosen.
If you are shifting load what hours do you anticipate reducing load from in order to increase your load during the AM or PM time period(s)? If not applicable please insert "N/A".	<---- Only applicable if "Behind the Meter - Demand Response" or "Behind the Meter - Permanent Load Shift" Technology Type is chosen.
<b>Offer Size (MW)</b>	Cannot exceed: 2.64

1. Choose Technology Type

2. Energy Efficiency Only: Select appropriate incrementality evaluation option: Project-specific basis (Custom) or Pre-specified Overlap (5% overlap factor)

3. Demand Response or Load Shift: Specify hours you anticipate on reducing load



# Offer Form – Pricing

OFFER PRICING	
FIXED PRICING	
Year 1 Price (\$ Per KW-Month)	
Year 2 Price (\$ Per KW-Month)	
Year 3 Price (\$ Per KW-Month)	
Year 4 Price (\$ Per KW-Month)	
Year 5 Price (\$ Per KW-Month)	
Year 6 Price (\$ Per KW-Month)	
Year 7 Price (\$ Per KW-Month)	
REVENUE CALCULATION	
Annual Revenue Year 1	\$0.00
Annual Revenue Year 2	\$0.00
Annual Revenue Year 3	\$0.00
Annual Revenue Year 4	\$0.00
Annual Revenue Year 5	\$0.00
Annual Revenue Year 6	\$0.00
Annual Revenue Year 7	\$0.00
TOTAL Revenue Years 1-7	\$0.00



# Offer Form – Offer Range

Specify if your offer price can be applied to a MW range outside of the drop-down list selection made for the offer.

OFFER RANGE	
Is the offer price indicated above applicable to a range of Grid Need (MW) amounts greater or less than the amount specified in this offer?	
Maximum Grid Need (MW) that can be applied to your offer	<--- Leave blank if not applicable
Minimum Grid Need (MW) that can be applied to your Offer	<--- Leave blank if not applicable

Enter a maximum or minimum MW amount that can be applied to your offer.



# Offer Form – Attestations

All participants must adhere to the attestations listed in the offer form to remain qualified and eligible.

ATTESTATIONS	
<b>Acknowledgement of Protocol</b>	
By selecting "Yes" Participant hereby agrees to the terms of the Solicitation Protocol. Participant acknowledges that any costs incurred to become eligible or remain eligible for the solicitation, and any costs incurred to prepare an offer for this solicitation are solely the responsibility of Participant.	
Title:	
Electronic Signature:	
Select "Yes" to certify that the typed name acts as your electronic signature.	
<b>Participant Authorization</b>	
By selecting "Yes" Participant hereby confirms that they are "a duly authorized representative of Participant."	
Title:	
Electronic Signature:	
Select "Yes" to certify that the typed name acts as your electronic signature.	
<b>Attestation</b>	
By providing the electronic signature below Participant hereby attests that all information provided in this Offer Package and in response to this DIDF Solicitation is true and correct to the best of Participant's knowledge as of the date such information is provided.	
Title:	
Electronic Signature:	
Select "Yes" to certify that the typed name acts as your electronic signature.	
<b>Multi-Use Application</b>	
Multi-Use Application Note: [Per CPUC D.18-01-003 Adopted Rule 9, storage provider is required to list any additional services the storage resource will provide outside of this solicitation. Reference Table 1 within the Decision for a list of services.]	





# Offer Form – File Name

**VERY IMPORTANT! Please follow instructions carefully.**

**Action Required: Follow file steps below**

**This offer form will not be accepted if the steps outlined below have not been followed!**

A new File Name must be generated via the steps below for each offer workbook submitted. If submitting multiple offers, please repeat these steps for each offer submitted.

These steps will create a unique, correctly formatted name that must be given to this offer form file before it is submitted. If you are submitting multiple offers and you employing "Save As" on a form you previously populated to create a new offer it is essential that a new/different file name be generated for each additional offer you create.

When you are ready to submit this form...

1) Click this button ►

2) Click 'Save This File' button below to submit in authorized format. Do not make changes to the filename in the dialog box.

3) Once you have named this offer form via the steps above and submitted this form to PG&E keep it unchanged in a secure location where you can refer to it should PG&E have questions. If a PG&E representative contacts you regarding this offer form they will reference the file name.

**These instructions must be exercised just prior to actual submission of the form. The file name composed above must be created after you have finalized the rest of the form.**

Generate File Name.  
This also generates  
the BidID, which is  
the same

Then click  
'Save This File'



# Offer Form - Key Takeaways

- Enable macros in the Excel file.
- Submit a single offer form for each grid need location.
- Ensure the file name is the same as the pre-populated Offer ID.
- Pay attention to “Units”, i.e. kW vs. MW.
- Be sure all fields are filled in completely.
- All required input fields should be green (not orange) for the offer form to be considered Complete.
- Data contained in Offer Forms must be consistent with future contract values.

# Intermission

Participants should email questions to [DIDFRFO@pge.com](mailto:DIDFRFO@pge.com)



Together, Building  
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# Q & A



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