



Worksheet for the preparation of the Questionnaire for the Prospective Independent Evaluator Using PowerAdvocate platform

Independent Evaluator Team:

1. Identify, if applicable, your Company's legal name, address, website, point of contact and backup point of contact information (i.e. contact name, address, telephone, facsimile number, email).

Bankruptcies and Pending Lawsuits

2. Has your firm or predecessor company declared bankruptcy in the last 5 years? Are there pending bankruptcies or other similar state or federal proceedings, outstanding judgments or pending claims or lawsuits that could affect the solvency of your Firm?
3. For the period December 1, 2007 through May 31, 2013, please identify and describe any Equal Employment Opportunity Commission (EEOC) complaints filed against you or your organization and the disposition of those complaints.

Supplier Diversity Programs

4. Please identify and describe your organization's Diversity Supplier programs or plans.
5. If your firm has received a Small, Women, Minority, and Disabled Veteran Business Enterprises (WMDVBEs) designation, please provide any documentation of that certification.

Procurement Processes, Power Purchase Agreements, and Power Sale Agreements:

6. Describe in detail the familiarity and experience of your proposed project team with design, administration and evaluation of Requests for Offers (RFOs) and Requests for Proposals (RFPs) for long-term procurement and for renewable resources, of the kind PG&E has proposed in its recent RFOs.

7. Describe the familiarity of your proposed project team with: a) Purchased Power Agreements (PPAs) and b) Purchase and Sale Agreements (PSAs) for power plants.
8. Describe the experience of your proposed project team with assessing PPAs and PSAs for power plants, on price and non-price factors.
9. What particular topics would you anticipate to be critical in the negotiations regarding the terms and conditions of a: a) PPA and b) PSA for a power plant?
10. In your opinion, what contract terms and conditions are toughest to negotiate, and why? What areas tend to be overlooked? Cite examples from your experience, as appropriate (use generic descriptions to avoid disclosing confidential information). Please limit your response to the top three issues.
11. In your opinion, which cost components are difficult to evaluate while making cross-comparison between PPAs and PSAs for power plants, and why? Please limit your response to the top three cost components.
12. Capital expenses associated with new power plant construction are anticipated to be a significant element in determining the cost for both PPA Offers and PSA Offers. What capability and experience does your proposed project team have in determining whether such capital expenses are reasonable as presented in the Offers PG&E will receive?
13. Operating characteristics of power plants are anticipated to be a significant element of each Offer. a) What capability and experience does your proposed project team have with how operating characteristics are specified in contracts of the type PG&E may execute? b) What capability and experience does your proposed project team have with how operating characteristics specified in an Offer and/or contract may be represented in models used to assess the value of the Offer and/or contract?
14. In your experience, what evaluation criteria and methodologies have been used in assessing and selecting among Offers in long-term RFOs and RFPs? How have you seen quantitative and non-quantitative factors integrated in the scoring and selection process?

Energy Products:

15. Describe the familiarity of your proposed project team with technologies for producing electricity from renewable sources.
16. Describe the familiarity of your proposed project team with technologies for energy storage,
17. Describe the familiarity of your proposed project team with technologies resulting from natural gas (e. g. capacity, storage, financial instruments).

18. Describe the skill and experience of your proposed project team in analyzing a range of power market derivatives (e.g., futures, options, swaps).
19. Describe the ability and experience of your proposed project team in verifying transmission characteristics that may affect the suitability of certain bids.

Bid Evaluation Process Approach and Modeling:

20. What evaluation criteria and methodology would you use in assessing and selecting among the Offers PG&E will receive? Do you anticipate using your own parallel methodology or is your approach more about validating PG&E's methodologies?
21. PG&E has used Market Valuation and Portfolio Adjusted Values evaluation criteria in its RFOs. (Market Valuation means how a bid's costs compares to the bid's benefits, from a market perspective. Portfolio Adjusted Value accounts for how well a bid's features match PG&E's portfolio needs.) How would you independently verify the analyses of Market Valuation and Portfolio Adjusted Value performed by PG&E?
22. How would you determine whether or not the RFO process is transparent and fair?
23. When looking at comparable, please describe how bilateral (non-RFO) offers should be assessed?
24. Describe the skill and experience of your proposed project team in analyzing a range of power market derivatives (e.g., futures, options, swaps).

Regulatory Experience:

25. Please describe your experience with testifying as expert witnesses in California Public Utility Commission proceedings, and providing reports or presentations to a Procurement Review Group?

Contractual Relationships:

26. a) i) Do you have an existing contractual relationship with, or financial interest in, PG&E? ii) Does any member of your proposed project team have an existing contractual relationship with, or financial interest in, PG&E? iii) Does the business entity that would be contracting party for the Independent Evaluator engagement, or any of its affiliates or subsidiaries or related companies, have an existing contractual relationship with, or financial interest in, PG&E? b) i) At any time since December 2007, did you have an existing contractual relationship with, or financial interest in, PG&E? ii) At any time since December 2007, did any member of your proposed project team have an existing contractual relationship with, or financial interest in, PG&E? iii) At any time since December 2007, did the business entity that would be contracting party for the Independent Evaluator engagement, or any of its affiliates or subsidiaries or related companies, have an existing contractual relationship with, or financial interest in, PG&E?

27. a) i) Do you have an existing contractual relationship with, or financial interest in, a market participant (other than PG&E) in the California energy markets? ii) Does any member of your proposed project team have an existing contractual relationship with, or financial interest in, a market participant (other than PG&E) in the California energy markets? iii) Does the business entity that would be contracting party for the Independent Evaluator engagement, or any of its affiliates or subsidiaries or related companies, have an existing contractual relationship with, or financial interest in, a market participant (other than PG&E) in the California energy markets? b) i) At any time since December 2007, did you have an existing contractual relationship with, or financial interest in, a market participant (other than PG&E) in the California energy markets? ii) At any time since December 2007, did any member of your proposed project team have an existing contractual relationship with, or financial interest in, a market participant (other than PG&E) in the California energy markets? iii) At any time since December 2007, did the business entity that would be contracting party for the Independent Evaluator engagement, or any of its affiliates or subsidiaries or related companies, have an existing contractual relationship with, or financial interest in, a market participant (other than PG&E) in the California energy markets?
28. Do you, any member of your proposed project team, the business entity that would be contracting party for the Independent Evaluator engagement, or any of its affiliates or subsidiaries or related companies, own or operate power facilities serving the California energy market or contract for any energy product serving the California energy market? If so, please describe and include the time period.
29. Green Supply Chain: If applicable, please identify your organization's Corporate Sustainability Program and/or Green Supply Chain Program (e.g. recycling, conservation, protection of the environment against pollution, etc.). a) Please describe, in detail, your organization's efforts and practices to reduce the environmental impacts of the services, products & materials your organization will be providing. Please provide quantitative examples where possible; b) In regard, to the services and materials specified in this RFP that your organization will be providing, what innovative ideas or alternative solutions does your organization offer to help reduce the overall carbon footprint; c) Describe in detail your organization's plans to mentor subcontractors or work in partnership with other companies on potential green projects; d) Describe in detail your organization's environmental efforts (past, present and future) to help reduce and offset the impact of your organization's business activities on the environment (e.g., recycling and composting program, carpool, commuter benefits, etc.).

Questions for those Independent Evaluators in PG&E's 2011-2013 Pool and/or who were a member of PG&E's previous IE pool. (if you have never been a part of PG&E's pool, do not fill respond to these questions.)

30. Please identify and describe role in relation to your assigned RFOs, RFBs, and separate bilateral agreements. Please include the (a) product type, (b) your participation and role, (c) any presentations to regulators, PG&E's Procurement Review Group, or PG&E, (d) what work products you produced that enhanced the

RFO, RFB, or separate bilateral agreement product and/or process. Please list no more than five projects.

31. Please identify and describe any challenges and new technologies you see facing the California energy market in the next five years. What specific skills, knowledge, experience, and/or resources do you or your organization possess, which would benefit PG&E, the CPUC Energy Division, and/or the Procurement Review Group with each challenge and/or new technologies.
32. Please identify and describe any other issues that PG&E has not specifically asked about but you or your organization believe is essential to communicate to the IE Evaluation Team.

Potential IE personnel or team member

33. For each potential IE personnel or team member please provide a) Employee's name, b) Job Title, c) Educational background, d) Professional background, e) certifications, f) other qualifications to demonstrate the member's ability to perform the role as an Independent Evaluator for a PG&E project, g) Employee's resume. Please limit the list to five potential IE personnel or team members.
34. For each potential IE personnel or team member, your organization shall list projects that the team member in your organization has performed relative to the scope of work for this RFP. If there are more than 5 projects for a team member, please select the most relevant to the California market projects for this section. Please list a) name of project, b) client name, c) whether this project was relevant to the California energy industry, d) Type of project (i.e. Electric procurement, Electric product, Natural Gas procurement, Natural Gas product, Renewable Energy project, Renewable Energy procurement, Energy Storage products, etc.), e) describe work performed, f) Role on project team, g) total cost of work (U.S. Dollar), h) Start of work, i) completion of work, j) approximate total contracted labor hours from start to completion of work, k) public version of written report for evaluating products, processes, or recommendations (if applicable), l) name of project reference that can be contacted by PG&E, m) project reference contact – phone number, n) project reference contact - email
35. For each subcontractor your firm plans to use for the performance partnership, please provide a) subcontractor's name, firm name, and job title, b) WMDVBE status and c) general description of work.

Project Specific Experience

36. Please describe other projects (not listed above) that were related to the California energy market. Please provide a brief description of the type of work. Please list a) name of project, b) Type of project (i.e. Electric procurement, Electric product, Natural Gas procurement, Natural Gas product, Renewable Energy project, Renewable Energy procurement, Energy Storage products, etc.), c) describe work performed, d) total cost of work (U.S. Dollar), e) Start of work, f) completion of work, g) approximate total contracted labor hours from start to completion of work, k) public

version of written report for evaluating products, processes, or recommendations (if applicable).

37. Please provide other previous clients (not listed above) that were related to a non-California energy market. Please list a) name of project, b) Type of project (i.e. Electric procurement, Electric product, Natural Gas procurement, Natural Gas product, Renewable Energy project, Renewable Energy procurement, Energy Storage products, etc.), c) describe work performed, d) total cost of work (U.S. Dollar), e) Start of work, f) completion of work, g) approximate total contracted labor hours from start to completion of work, k) public version of written report for evaluating products, processes, or recommendations (if applicable).

Pricing Requirements

38. For each of your employees, please provide the employee's name, title and hourly rate.
39. For each of subcontractor, please provide the employee's name, firm name, title and hourly rate.
40. Are you amenable to considering a fixed time and expense contract with an annual "not to exceed" dollar amount? If yes, please state the minimum "not to exceed" dollar amount a) on a project basis and/or b) per month you would consider?
41. Does your firm use multiple employees on a given project? If "yes", please describe how your firm's hourly billing rate and business expenses will be calculated when two or more employees (or subcontractors) are assigned to a single project for the following activities: a) phone/conference calls, b) in person meetings (e.g. Bidder's Conferences, PRG Meetings, Opening bids, etc.), c) presentation preparation, d) analysis/modeling, e) report writing, and f) intra-firm meetings.