

Bidders Conference

2019 Local Government Partnerships Energy Efficiency Programs

Request for Abstract No. 92333



Together, Building
a Better California



- Safety Procedures Completed for PG&E
- Attendees on the phone, please ensure you review your safety processes/procedures



Agenda

Topic	Presenter	Start / End Time
Safety Briefing	Paula Paschal	9:00am – 9:05am
Welcome and Background	Eva Chu	9:05am – 9:15am
RFA Schedule	Paula Paschal	9:15am – 9:20am
PowerAdvocate Access	Paula Paschal	9:20am – 9:30am
Review RFA & Documents	Brendan Havenar-Daughton	9:30am – 10:30am
Supply Chain Responsibility	David Pell	10:30am – 10:40am
Question & Answer Session	All	10:40am – 11:50am
Closing Remarks	Brendan Havenar-Daughton	11:50am – 12:00pm



Welcome and Opening Remarks

Eva Chu

Manager, Residential & Partnership Programs



Conference Logistics & Disclaimers

- Please place all lines on MUTE.
- PG&E will not take live questions during the presentation.
- Send questions to PG&E via the chat function within WebEx.
- PG&E may not address all questions immediately during this session.
- After the conference, PG&E will post to Power Advocate a Q&A document of all questions asked. All registered bidders will have access.
- Participants should carefully review the RFA Solicitation General Instructions and all RFA materials, available within Power Advocate.
- To the extent that there are any inconsistencies between the information provided in this presentation and the requirements in the RFA materials, the RFA materials published in Power Advocate shall govern.



RFA Schedule

Event	Date	Time
RFA Released to Bidders	May 23, 2019	8:00 AM PST
Deadline to Submit Questions in PowerAdvocate	June 7, 2019	Due 4:00pm PST
PG&E Responses to Bidder Questions	June 13, 2019	-
RFA Responses Due Date	June 21, 2019	Due 4:00pm PST
PG&E RFA selection and notification to Bidder of advancement to RFP stage	July 31, 2019	



Power Advocate Overview

Power Advocate Access: <http://www.poweradvocate.com/index.html>

To add additional individuals to your team for the RFA name, e-mail, and telephone number

Power Advocate Support

(857) 453-5800 • info@poweradvocate.com

RFA Documents

92333 : Local Government Partnership Energy Efficiency Programs

Pacific Gas and Electric Company (PG&E)

Open: 05/23/19 08:00 AM (PDT) Close: 06/21/19 04:00 PM (PDT) Time Remaining: 22 days 1 hour 37 mins 33 secs

Buyer Contact: Paula Paschal

- 1. Download Documents
- 2. Upload Documents
- 3. Commercial Data
- 4. Technical Data
- 5. Pricing Data
- Messaging

Select All Download Selected Files Clear All

Commercial and Administrative

Document Description	Issue Date	Ref ID	File Name	File Size	Download
 Bidder Conference updated 05232019	05/23/19		Bidder_Conference_updated_05232019.docx		<input type="checkbox"/>
 General Instructions	05/22/19		RFA_LGP_General_Instructions_FINAL_TO_POST_May_23.docx		<input type="checkbox"/>

Technical Information

Document Description	Issue Date	Ref ID	File Name	File Size	Download
 Narrative Response Form	05/22/19		RFA_LGP_Narrative_Response_Form_FINAL_TO_POST_May_23.docx		<input type="checkbox"/>
 Questionnaire Response Form	05/22/19		RFA_LGP_Questionnaire_Response_Form_FINAL_TO_POST_May_23.xlsx		<input type="checkbox"/>



EE Solicitation Overview

- The Local Government Partnership RFA/RFP is part of the larger EE Portfolio solicitation with the goal of refreshing EE program offerings by increasing innovation and improving cost-effectiveness
- 2-stage solicitation process for soliciting LGP Program designs. The first stage will be a Request for Abstract (“RFA”) followed by a second stage which is the Request for Proposal (“RFP”).
- Abstracts are brief, high-level summaries of LGP Program approaches
- Given that Local Government Partnership (“LGP”) Programs will be proposed, designed, implemented and delivered by non-utility personnel - these LGP Programs will be considered as 3P Programs and will meet the outsourcing milestones established by the CPUC in D.18-01-004

% of EE Budget	Program Year	Due Date
25% minimum	2020	By December 19, 2019
40% minimum	2021	By December 31, 2020
60% minimum	2023	By December 31, 2022



LGP RFA Objectives

- PG&E is seeking non-resource LGP Program proposals that support PG&E's cost-effective program portfolio and achieve portfolio goals. Proposals should target the following customer segments:
 - Local Government
 - K-12 Schools
 - Hard-To-Reach
 - Disadvantaged Communities

Specific Objectives:

- Increasing the opportunities for customers to save energy in local public buildings, especially for those local governments that serve Hard to Reach (HTR) and/or disadvantaged communities (DAC) customers
- Increasing the opportunities to save energy for any HTR customers and/or customers in DAC through working with local governments
- Improving local government staff capacity to conduct activities that will lead to energy efficiency for the local government and/or its communities



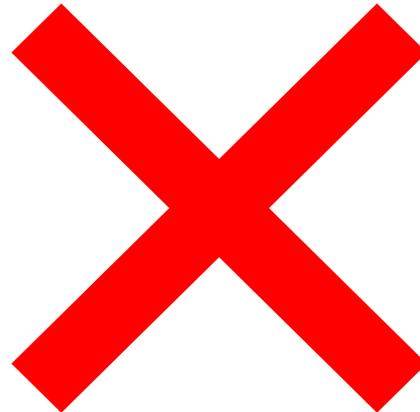
RFA Eligibility

This targeted solicitation for non-resource LGP Programs is limited to Bidders who fit at least one of the following eligibility criteria:

- Existing lead local partners (“LLP”) of current LGP Programs
- Local Governments
- Entities who have an existing relationship with local government(s) and who can leverage local government expertise, access and infrastructure to implement energy efficiency programs

Bidders who do not meet one of these criteria will not be scored.

- Resource Acquisition Activities
- EE Programs identified for statewide administration
- Income Qualified energy efficiency programs and non-energy efficiency products or services;
- EM&V consulting services or services that support PG&E portfolio administrative task and/or other LGP program offerings;
- Activities that duplicate existing products or services of the Workforce Education and Training (“WE&T”), Emerging Technologies (“ET”), and Codes and Standards (“C&S”) programs
- Programs that duplicate EE programs offered by other entities active in the PG&E service territory like Community Choice Aggregators (“CCAs”) or Regional Energy Networks (“RENs”).



Scope of Solicitation: In-scope

- Non-Resource activities
- Increasing the opportunities for customers to save energy in local public buildings
- Increasing the opportunities to save energy for any HTR customers and/or customers in DAC through working with local governments
- Improving local government staff capacity to conduct activities that will lead to energy efficiency for the local government and/or its communities





Desired Outcomes & Program Needs

Desired Outcomes	Program Needs
LGPs Supporting Energy Saving Projects in the Public Sector	Facilitating Projects with Deeper Savings, More Comprehensive EE
	Increasing Awareness of EE Opportunities in Public Sector Buildings
LGPs Supporting Energy Saving Projects for HTR and DAC Customers	Facilitating Projects with Deeper Savings, More Comprehensive EE
LGPs Supporting Building Capacity to Help Save Energy	Improving EE Awareness of Public Sector Staff
	Advancing EE Community-wide
	Supporting GHG Inventories
	Advancing EE in Public Sector Policies
	Creating and Adopting Standards for Municipal Facilities



Customer Segments Served by LGPs

- Local Government (Including Special Districts)
 - K-12 Schools
 - Hard-To-Reach
 - Disadvantaged Communities
-
- Refer to Section (K) in RFA for detailed definitions of HTR and DAC

Residential	Small Business
Geography	
A. Business or home located in areas other than the United States Office of Management and Budget Combined Statistical Areas of the San Francisco Bay Area or the Greater Sacramento Area,	
OR	
A. Customer resides in an area defined as a Disadvantaged Community (see next section for definition).	
Language	
Primary language spoken is other than English	
Income	Business Size
Customers who qualify for the California Alternative Rates for Energy ("CARE") or the Family Electric Rate Assistance Program ("FERA")	Less than 10 employees and/or demand is less than 20kW and/or gas consumption under 10,000 Therms annually
Housing Type	Leased or Rented Facilities
Multi-Family and Mobile Home tenants (rent and lease)	Investments in improvements to a facility rented or leased by a participating business customer

Disadvantaged Community Definition – Pursuant to Section 39711 of the Health and Safety Code, the California Environmental Protection Agency ("CalEPA") developed a means for identifying disadvantaged communities, which may include, but are not limited to:

(1) Areas disproportionately affected by environmental pollution and other hazards that can lead to negative public health effects, exposure, or environmental degradation.

(2) Areas with concentrations of people that are of low income, high unemployment, low levels of homeownership, high rent burden, sensitive populations, or low levels of educational attainment.

The CalEnviroScreen Tool utilizes a number of indicators to develop a composite "score," which ranks a given census tract's overall burden across the variety of indicators relative to all other census tracts' scores. Indicators include both Pollution Burden indicators (exposure



Non-Resource Focus

- PG&E will only consider non-resource Local Government Partnership program proposals
- Note: Resource Program activities directly produce energy savings that are quantified, tracked and claimed with the CPUC.
- Note: Non-resource program activities do not directly procure energy savings that can be claimed. Examples of these activities include marketing, outreach and education, and workforce education and training.



Cost Effectiveness

- Cost effectiveness is an important element of all programs in PG&E's portfolio, including non-resource programs
- Non-resource programs have the potential to support resource acquisition efforts in a cost-effective way by producing valuable outcomes that become inputs for resource acquisition efforts
- Bidders' alignment with and support of cost-effective resource acquisition will be reviewed during the RFP stage.
- Bidders should be aware and have program design principles in mind that support overall portfolio cost-effectiveness when crafting their abstracts



Innovation

- PG&E seeks new and innovative ways to achieve energy savings and serve customers
- The inclusion of innovative program elements will be taken into consideration during abstract reviews and may help differentiate a program proposal from those submitted along with this solicitation
- Innovation: To be “innovative,” the proposal must demonstrate that the program will ultimately increase the uptake of cost-effective energy efficiency by advancing a technology, marketing strategy, or delivery approach in a manner different from previous efforts (further defined on page 32 of the General Instructions)



Regulatory Compliance

- It is essential that any programs recommended for contract execution as a result of this solicitation process demonstrate compliance with all regulatory program requirements
- While regulatory compliance is not the focus of the RFA stage of the solicitation, Bidders should be aware of and familiar with key regulatory rulings as they formulate program concepts and engage in preliminary program design
- A set of references has been compiled for Bidders and can be found in the Appendix of the RFA General Instructions document and in the 'Resources' section of the EE Solicitations webpage.
- These topics will be thoroughly reviewed in the RFP stage of the solicitation



Key Abstract Selection Factors

- The Bidder's experience working with local governments;
- Overall alignment with future portfolio vision laid out in the PG&E Business Plan, PG&E Solicitation Plan, and metrics;
- Confidence in the assessment and underlying assumptions of the proposed program impact and benefits;
- The proposal demonstrates an awareness and understanding of all key implementation steps;
- The proposed organization possess the qualifications and capabilities essential for program execution;
- The proposed organization demonstrates a successful track record of prior program implementation experience;
- The proposed program incorporates new, innovative or unique program design elements that will enhance program effectiveness;
- Completeness of the proposal and responsiveness to the requirements of this RFA.

Note: These factors are not necessarily listed in any order of importance. PG&E at its sole discretion may decide to use some or all of these factors when evaluating the potential value of a proposed program in PG&E's portfolio.



RFA Structure

- PG&E's RFA application consists of two parts
- Both forms are required for proposal evaluation

Narrative Response Form

- Microsoft Word document (.docx)
- Pre-formatted template
- Overall RFA length limited (7 pages of content, tables, graphs, etc)
- Sections Pre-Defined:
 - Executive Summary
 - Program Concept
 - Organization Experience & Qualifications
- Suggested *section* length is provided but flexible

Questionnaire Response Form

- Microsoft Excel document (.xlsx)
- Pre-formatted template
- Tabs include:
 - Questionnaire Response Form
 - PG&E Service Territory



Abstract Submission Process

- All abstracts must be submitted electronically via the PowerAdvocate platform
 - Late submission will not be reviewed
 - Do not wait to the last minute to upload
- All uploaded documents must adhere to the formatting specifications
 - Do not go beyond the total page limit of the Narrative Response Form
 - Do not reformat tables in the Data Response Form
 - Use the following **Naming Convention** when uploading documents:

[Organization Name] + LGP + 2019 RFA + [Narrative] or [Questionnaire]

Example:

An organization named The Best City would submit their full RFA proposal documentation as:

The Best City_LGP_2019 RFA_Narrative *AND*

The Best City_LGP_2019 RFA_Questionnaire



Independent Evaluators (IE)

- Independent Evaluators (IE) with specific EE subject matter expertise will help ensure the competitive solicitation process is transparent and fair
- Primary role of the IE is to:
 - Monitor Solicitation 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 RFA/RFP process and proposed transactions to Procurement Review Group (PRG) when filed for CPUC approval
- The IE may review all Offer data and communications with solicitation Participants
- All IEs have passed conflict of interest screens and executed Non-Disclosure Agreements to participate in the solicitation process
- Bidders should refrain from directly contacting or otherwise try to exert influence of an Independent Evaluator during a solicitation



Communications

- All questions regarding this RFA should be submitted via PowerAdvocate “Messaging” function
- Questions submitted after the deadline may not be answered.
- Questions and the written response will be posted to the ‘Download Documents’ tab in PowerAdvocate for all Bidders to access but will not identify who submitted the question.
- PG&E staff is not available for verbal conversations with individual Bidders and will not respond to additional requests for information outside of the PowerAdvocate platform
- Submission of questions is not mandatory and does not impact the review or scoring of the RFA



Confidentiality

- PG&E will keep Abstracts confidential.
- PG&E will not share program information and ideas provided in RFA and RFP with other Bidders nor any other energy efficiency service providers.
- However, PG&E may submit Bidder's Abstracts and proposals to the Commission and their authorized agents (PRG and IE members) for review per request.
 - Participation as an IE or on the PRG as non-Commission staff requires a successful review of conflicts of interest and execution of an NDA.
- By submitting an Abstract in response to this RFA, Bidder acknowledges and agrees that PG&E will not assume any liability to a Bidder or other party as a result of any public disclosure of any Abstract.



To learn more about PG&E's Supplier Diversity Program, please visit us at:

www.pge.com/supplychainresponsibility/

Where you will find:

- 2018 Supplier Diversity Annual Report
- Diverse Business Events Calendar
- "Supply Chain Responsibility" Newsletters
- "Diverse Suppliers Go Green" materials
- Additional information and resources

Please submit your questions through the
WebEx chat function.