

Bidders Conference

2019 Statewide New Construction Energy Efficiency Programs

Request for Abstract No. 92647



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	Anthony Abdulla	9:00am
Welcome/Opening Remarks	Matt Braunwarth	9:00am – 9:05am
Logistics/Schedule	Anthony Abdulla	9:05am – 9:15am
RFA Approach and Process	Pat Eilert / Matt Braunwarth	9:15am – 9:25am
Supply Chain Responsibility	David Pell	9:25am – 9:30am
10 Minute Break		~9:30am
Question & Answer Session	All	9:40am – 11:00am



Welcome and Opening Remarks

Matt Braunwarth

Manager, Energy Efficiency Procurement



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 and the EE Solicitations Website.
- 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.



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 Participants
- All IEs have passed conflict of interest screens and executed Non-Disclosure Agreements to participate in the solicitation process
- Bidders shall refrain from directly contacting or otherwise try to exert influence of an Independent Evaluator during a solicitation
- The IEs assigned to oversee this solicitation are:
 - The Mendota Group
 - EAJ Energy Advisors
 - Barakat Consulting



RFA Schedule

Event	Date
RFA Released to Bidders	May 28, 2019
Bidder's Webinar	June 6, 2019
Deadline to Submit Questions in PowerAdvocate	June 14, 2019 Due 4:00pm PST
PG&E Responses to Bidder Questions	June 21, 2019
RFA Responses Due Date	June 28, 2019 Due 4:00pm PST



PowerAdvocate Overview

PowerAdvocate 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

92647 : Statewide New Construction

Pacific Gas and Electric Company (PG&E)

Open: 05/29/19 04:00 PM (PDT) Close: 06/28/19 04:00 PM (PDT)

Time Remaining: 27 days 23 hours 29 mins 51 secs

Buyer Contact: Tony Abdulla

1. Download Documents

2. Upload Documents

3. Commercial Data

4. Technical Data

5. Pricing Data

Messaging

Select All Download Selected Files Clear All

Document Description	Issue Date	Ref ID	File Name	File Size	Download
01 RFA_SWNC_General Instructions	05/29/19		01_RFA_SWNC_General_Instructions.docx		<input type="checkbox"/>
02 RFA_SWNC_Narrative Response Form	05/29/19		02_RFA_SWNC_Narrative_Response_Form.docx		<input type="checkbox"/>
03 RFA_SWNC_Data Response Form	05/29/19		03_RFA_SWNC_Data_Response_Form.xlsx		<input type="checkbox"/>



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 page limit of the Narrative Response Form
 - Do not reformat tables in the Data Response Form
 - Use the following Naming Convention when uploading documents:

Company Name - Program Name - 2019 NC RFA



Communications

- Any questions regarding this RFA should be submitted via PowerAdvocate “Messaging” function and the Questionnaire template
- Questions submitted after the deadline will 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 are not available for conversations with individual Bidders outside of requests for information through 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 and Bidder's responses to this RFA confidential.
- PG&E will not share Bidder Abstracts, program information and ideas provided in RFA with other Bidders nor any other energy efficiency service providers.*
- However, PG&E will disclose and provide Bidder's Abstracts and any other documentation submitted as of this RFA, to PG&E's IEs, PRG, and the CPUC and its staff.
- PG&E cannot ensure that CPUC or the PRG and IEs will afford confidential treatment to any information Bidder provides in their Abstract or submits as part of this RFA.
- 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 as a result of any public disclosure of Bidder's Abstract or other submitted information resulting from this RFA.

* The lone exception relates to the definition of alterations per Section 2.E. of the RFA's General Instruction.



RFA Approach and Overview

Per CPUC D. 18-05-041, PG&E is the lead Program Administrator for Statewide New Construction program(s) on behalf of the Statewide IOUs (service territories include PG&E, SCE, SDG&E and SoCalGas)

Single RFA for Statewide New Construction that includes both Residential and Nonresidential, with greater emphasis on Codes and Standards

Testing the market to respond with innovative abstracts which address:

- a) California energy policy and climate goals
- b) Changing market conditions and building codes
- c) The need for cost effective programs that prepare the market for future codes
- d) Complex, multi-system alterations which support nearer-term information gathering needs
- e) The value of implementing and tracking behavior change activities to inform the expected long term persistence of energy savings
- f) New Construction program boundaries
- g) IDSM approaches which minimize missed opportunities

Scope of Solicitation

IN-SCOPE

- Single- or multi-family residential projects and/or nonresidential buildings of any occupancy type covered by Title 24, Parts 6 & 11, and Title 25
- Processes covered by Title 24, Part 6
- Additions
- Significant alterations which support future codes and standards

OUT-OF-SCOPE

- Inconsistent program design across IOU territories
- Retrofit activities that do not trigger energy code building permits
- Small, stand-alone, lighting retrofits
- One-to-one change-outs of HVAC units
- Standalone demand response, cogeneration, distributed generation and self-generation programs
- Local pilot activities not ready for statewide treatment
- Programs that rely upon unproven technologies or proprietary technology



RFA Evaluation Factors

Program Concept

- Assessment of Program Design and Benefits
- Assessment of support for future codes and standards
- Program Feasibility
- Innovative Program Design Features

Company Experience & Qualifications

- Team Composition & Qualifications
- Prior New Construction Program Experience

While regulatory compliance is not the focus of the RFA stage of the solicitation, Bidders should be familiar and comply with legal and regulatory requirements as they formulate program concepts and engage in preliminary program design.



RFA Structure

- PG&E's RFA application will consist of 2 parts

Narrative Response Form

Pre-formatted template (.docx) (14 pages)

- Executive Summary (1 page)
- Program Description (10 pages)
 - Assessment of Program Design and Benefits
 - Support for Future Codes & Standards
 - Program Feasibility
 - Innovative Program Design Features
- Company Experience and Qualifications (3 pages)
 - Team Compositions and Qualifications
 - Prior New Construction Program Experience

Program Data Response Form

Pre-formatted template (.xlsx)

- Collects quantitative information
- Data tabs include:
 - Tab A: Company Information
 - Tab B: Program Summary Data
- Unscored but collected information
 - Tab C: Disadvantaged Workers
 - Tab D: Workforce Standards
 - Tab E: Supply Chain Responsibility

File Naming Convention

Company Name - Program Name - 2019 NC RFA



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
- These topics will all be thoroughly reviewed in the RFP stage of the solicitation
- Regulatory compliance references are included in the Appendix of the “RFA General Instructions” document and in the “Resource” section of the EE Solicitations webpage (<https://www.pge.com/eesolicitations>)



Supply Chain Responsibility



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.