Bidders Conference

2019 Statewide New Construction Energy Efficiency Programs

Request for Abstract No. 92647
Today’s Emergency Procedures

- Safety Procedures Completed for PG&E
- Attendees on the phone, please ensure you review your safety processes/procedures
<table>
<thead>
<tr>
<th>Topic</th>
<th>Presenter</th>
<th>Start / End Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety Briefing</td>
<td>Anthony Abdulla</td>
<td>9:00am</td>
</tr>
<tr>
<td>Welcome/Opening Remarks</td>
<td>Matt Braunwarth</td>
<td>9:00am – 9:05am</td>
</tr>
<tr>
<td>Logistics/Schedule</td>
<td>Anthony Abdulla</td>
<td>9:05am – 9:15am</td>
</tr>
<tr>
<td>RFA Approach and Process</td>
<td>Pat Eilert / Matt Braunwarth</td>
<td>9:15am – 9:25am</td>
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<tr>
<td>Supply Chain Responsibility</td>
<td>David Pell</td>
<td>9:25am – 9:30am</td>
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<tr>
<td>10 Minute Break</td>
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<td>~9:30am</td>
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<tr>
<td>Question &amp; Answer Session</td>
<td>All</td>
<td>9:40am – 11:00am</td>
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</tbody>
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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:
  o The Mendota Group
  o EAJ Energy Advisors
  o Barakat Consulting
## RFA Schedule

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
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<tbody>
<tr>
<td>RFA Released to Bidders</td>
<td>May 28, 2019</td>
</tr>
<tr>
<td>Bidder’s Webinar</td>
<td>June 6, 2019</td>
</tr>
</tbody>
</table>
| 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                |
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

<table>
<thead>
<tr>
<th>Document Description</th>
<th>Issue Date</th>
<th>Ref ID</th>
<th>File Name</th>
<th>File Size</th>
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<tbody>
<tr>
<td>01 RFA_SWNC_General Instructions</td>
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<tr>
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<tr>
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<td>03_RFA_SWNC_Data_Response_Form.xlsx</td>
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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.
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
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.
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).
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.