

PUBLIC UTILITIES COMMISSION

505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3298



June 25, 2021

Sidney Dietz
Director, Regulatory Relations
Pacific Gas and Electric Company
77 Beale Street, Mail Code B13U
P.O. Box 770000
San Francisco, California 94177

Dear Mr. Dietz,

This disposition letter serves as a notice of approval of Pacific Gas and Electric Company's (PG&E's) 2021 Third-Party Solicitation:

4442-G/6207-E: Strategic Energy Innovations Energize Careers Program

This Advice Letter is effective June 25th, 2021.

Background

Decision D.18-01-004, the Third-Party Solicitation Process Decision, requires the four California Investor-Owned Utilities (IOUs) to file a Tier 2 advice letter for each third-party contract, or batch of third-party contracts, that is valued at \$5 million or more and/or with a term of longer than three years, for commission review.¹ On June 1, 2021, PG&E filed this Workforce Education and Training Career and Workforce Readiness program advice letter as part of its Statewide Workforce Education and Training solicitation.

In operationalizing the review of third-party advice letters, EE Staff focused its review on the fairness of the solicitations process, size of contract budget and forecasted savings, and the contract's contribution to the portfolio-level cost-effectiveness requirements. Approval of this advice letter is not evidence of Commission approval of future program implementation. It is PG&E's responsibility to manage its portfolio to ensure it remains in compliance with its approved business plan and all CPUC Decisions.

Implementation Plan Development

Decision D.18-05-041, the Business Plan Decision, Ordering Paragraph 2 requires implementation plans to be posted within 60 days of contract execution, or within 60 days of Commission approval if the contract meets the advice letter threshold. With the issuance of this disposition, implementation plan for this program is due to be posted no later than August 24th, 2021.

¹ D.18-01-004, pg. 57

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Please direct any questions regarding Energy Division's findings in this non-standard disposition to Jordan Christenson (jordan.christenson@cpuc.ca.gov).

Sincerely,

A handwritten signature in black ink, appearing to read "ER" followed by "(FOI)" in parentheses.

Edward Randolph
Deputy Executive Director for Energy and Climate Policy/
Director, Energy Division

Cc: Service List R.13-11-005
Pete Skala, Energy Division
Jennifer Kalafut, Energy Division
Alison LaBonte, Energy Division
Jordan Christenson, Energy Division

May 28, 2021

Advice 4442-G/6207-E

(Pacific Gas and Electric Company U 39 M)

Public Utilities Commission of the State of California

Subject: Advice Letter Submittal of Pacific Gas and Electric Company's Third-Party Solicitations resulting from its Statewide Workforce Education and Training Career and Workforce Readiness Request for Proposal ("RFP") Energize Careers program, executed between Strategic Energy Innovations and PG&E

Purpose

In compliance with Decision (D.) 18-01-004, Pacific Gas and Electric Company ("PG&E") hereby requests the California Public Utilities Commission ("Commission" or "CPUC") and requests approval of the Energy Efficiency ("EE") Program Implementation Agreement ("PIA" or "Contract") executed between PG&E and Strategic Energy Innovations. This Contract results from PG&E's Statewide Workforce Education and Training Career and Workforce Readiness Request for Proposal ("RFP") solicitation for statewide non-resource EE customer programs and will contribute towards meeting PG&E's 60 percent third-party outsourcing compliance requirement.

Background

In Decision (D.) 15-10-028, the Commission established and adopted the Rolling Portfolio process for regular review and revision of the EE program administrators' (PAs') portfolios. In August 2016, the Commission adopted D.16-08-019, which defined the terms and the requirements for the utility PAs to administer statewide and third-party programs.

Under the framework of the rolling portfolio, the Commission adopted D. 18-01-004 for procurement of EE programs through a solicitation process. That Decision directed the investor-owned utilities ("IOUs"), including PG&E, to meet specific third-party outsourcing targets by certain dates in order to transition to a majority third-party-implemented portfolio by 2023. Specifically, D. 18-01-004 and D. 18-05-041 ordered the IOUs to have at least 25 percent of their 2020 program budgets under contract for programs designed

and implemented by third-party providers by December 19, 2019¹, at least 40 percent by December 31, 2020, and at least 60 percent by December 31, 2022. Additional details are provided in the Public Section of this Advice Letter.

Compliance Requirements

Per D.18-01-004, the IOUs are required to submit a Tier 2 advice letter for each EE third-party contract that is valued at \$5 million or more and/or with a term longer than three years.

The Commission developed a template which outlines the required information and documentation for each third-party advice letter submission. The table below provides a list of the required content and indicates where PG&E is providing the content within this submission.

Table 1: Required Content for Advice Letter Submission

	Contents, Attachments, and Appendices	Part 1 Public	Part 2 Confidential
1	Introduction: Purpose and Subject (Summary of Contracts)	Part 1.1.A- 1.1.B	Appendix D
2	Introduction: Solicitation Process Overview	Part 1.1.C	Appendix B
3	Transition Plan	Part 1.2	
4	Confidentiality	Part 1.3	
5	Final IE Report	Attachment A	Appendix A
6	Program-Level Measurement & Evaluation (M&V) Plan for NMEC programs seeking exceptions to the NMEC Rules	Attachment B	
7	Selection spreadsheet (in Excel)		Appendix C
8	Executed third-party contract		Appendix E

The public version of this advice letter is provided to the service lists for Rulemaking (“R.”) 13-11-005. The confidential version of the advice letter is provided only to the Commission.

¹ D. 18-05-041 OP (4). PG&E was granted an extension to June 30, 2020.

Protests

*****Due to the COVID-19 pandemic, PG&E is currently unable to receive protests or comments to this advice letter via U.S. mail or fax. Please submit protests or comments to this advice letter to EDTariffUnit@cpuc.ca.gov and PGETariffs@pge.com*****

Anyone wishing to protest this submittal may do so by letter sent via U.S. mail, facsimile or E-mail, no later than **June 17, 2021**, which is 20 days after the date of this submittal. Protests must be submitted to:

CPUC Energy Division
ED Tariff Unit
505 Van Ness Avenue, 4th Floor
San Francisco, California 94102

Facsimile: (415) 703-2200
E-mail: EDTariffUnit@cpuc.ca.gov

Copies of protests also should be mailed to the attention of the Director, Energy Division, Room 4004, at the address shown above.

The protest shall also be sent to PG&E either via E-mail or U.S. mail (and by facsimile, if possible) at the address shown below on the same date it is mailed or delivered to the Commission:

Sidney Dietz
Director, Regulatory Relations
c/o Megan Lawson
Pacific Gas and Electric Company
77 Beale Street, Mail Code B13U
P.O. Box 770000
San Francisco, California 94177

Facsimile: (415) 973-3582
E-mail: PGETariffs@pge.com

Any person (including individuals, groups, or organizations) may protest or respond to an advice letter (General Order 96-B, Section 7.4). The protest shall contain the following information: specification of the advice letter protested; grounds for the protest; supporting factual information or legal argument; name, telephone number, postal address, and (where appropriate) e-mail address of the protestant; and statement that the protest was sent to the utility no later than the day on which the protest was submitted to the reviewing Industry Division (General Order 96-B, Section 3.11).

Effective Date

Pursuant to General Order (GO) 96-B, Rule 5.2, and OP 2 of D.18-01-004, this advice letter is submitted with a Tier 2 designation. PG&E requests that this Tier 2 advice submittal become effective on regular notice, **June 27, 2021**, which is 30 calendar days after the date of submittal.

Notice

In accordance with General Order 96-B, Section IV, a copy of this advice letter is being sent electronically and via U.S. mail to parties shown on the attached list and the parties on the service list for **R.13-11-005**. Address changes to the General Order 96-B service list should be directed to PG&E at email address PGETariffs@pge.com. For changes to any other service list, please contact the Commission's Process Office at (415) 703-2021 or at Process_Office@cpuc.ca.gov. Send all electronic approvals to PGETariffs@pge.com. Advice letter submittals can also be accessed electronically at: <http://www.pge.com/tariffs/>.

_____/S/

Sidney Dietz
Director, Regulatory Relations

Attachments

cc: Service List R.13-11-005



ADVICE LETTER SUMMARY

ENERGY UTILITY



MUST BE COMPLETED BY UTILITY (Attach additional pages as needed)

Company name/CPUC Utility No.: Pacific Gas and Electric Company (U 39 M)

Utility type:

- ELC GAS WATER
 PLC HEAT

Contact Person: Stuart Rubio

Phone #: (415) 973-4587

E-mail: PGETariffs@pge.com

E-mail Disposition Notice to: SHR8@pge.com

EXPLANATION OF UTILITY TYPE

ELC = Electric GAS = Gas WATER = Water
 PLC = Pipeline HEAT = Heat

(Date Submitted / Received Stamp by CPUC)

Advice Letter (AL) #: 4442-G/6207-E

Tier Designation: 2

Subject of AL: Advice Letter Submittal of Pacific Gas and Electric Company's Third-Party Solicitations resulting from its Statewide Workforce Education and Training Career and Workforce Readiness Request for Proposal ("RFP") Energize Careers program, executed between Strategic Energy Innovations and PG&E

Keywords (choose from CPUC listing): Compliance

AL Type: Monthly Quarterly Annual One-Time Other:

If AL submitted in compliance with a Commission order, indicate relevant Decision/Resolution #: D. 18-01-004

Does AL replace a withdrawn or rejected AL? If so, identify the prior AL: No

Summarize differences between the AL and the prior withdrawn or rejected AL: N/A

Confidential treatment requested? Yes No

If yes, specification of confidential information: See Confidentiality Declaration and Matrix
Confidential information will be made available to appropriate parties who execute a nondisclosure agreement. Name and contact information to request nondisclosure agreement/ access to confidential information: Matthew Braunwarth, (415)973-4058, MPBb@pge.com

Resolution required? Yes No

Requested effective date: 6/27/21

No. of tariff sheets: 0

Estimated system annual revenue effect (%): N/A

Estimated system average rate effect (%): N/A

When rates are affected by AL, include attachment in AL showing average rate effects on customer classes (residential, small commercial, large C/I, agricultural, lighting).

Tariff schedules affected: N/A

Service affected and changes proposed¹: N/A

Pending advice letters that revise the same tariff sheets: N/A

¹Discuss in AL if more space is needed.

Protests and all other correspondence regarding this AL are due no later than 20 days after the date of this submittal, unless otherwise authorized by the Commission, and shall be sent to:

CPUC, Energy Division
Attention: Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102
Email: EDTariffUnit@cpuc.ca.gov

Name: Sidney Dietz, c/o Megan Lawson
Title: Director, Regulatory Relations
Utility Name: Pacific Gas and Electric Company
Address: 77 Beale Street, Mail Code B13U
City: San Francisco, CA 94177
State: California Zip: 94177
Telephone (xxx) xxx-xxxx: (415)973-2093
Facsimile (xxx) xxx-xxxx: (415)973-3582
Email: PGETariffs@pge.com

Name:
Title:
Utility Name:
Address:
City:
State: District of Columbia Zip:
Telephone (xxx) xxx-xxxx:
Facsimile (xxx) xxx-xxxx:
Email:

**BEFORE THE PUBLIC UTILITIES COMMISSION OF
THE STATE OF CALIFORNIA**

PACIFIC GAS AND ELECTRIC COMPANY (U 39 M)

**DECLARATION OF MATTHEW BRAUNWARTH
SEEKING CONFIDENTIAL TREATMENT
FOR CERTAIN DATA AND INFORMATION
CONTAINED IN ADVICE LETTER 4442-G/6207-E**

I, Matthew Braunwarth, declare:

1. I am presently employed by Pacific Gas and Electric Company (“PG&E”) and have been an employee at PG&E since November 2010. I am the manager of Energy Efficiency Procurement department in PG&E’s Energy Efficiency organization. In this position, my responsibilities include managing the solicitation and finalization of the Program Implementation Agreement (“PIA”) submitted for approval in this Advice Letter. In carrying out these responsibilities, I have acquired confidential information related to offers received in this solicitation. Through this experience, I have become familiar with the type of information that could affect the negotiating position of energy efficiency sellers with respect to price and other terms, as well as with the type of information that such sellers consider confidential and proprietary.

2. Based on my knowledge and experience, and in accordance with (“D”) 06-06-066, 0804-023, and relevant Commission rules, I make this declaration seeking confidential treatment for certain data and information contained in the attachments to Advice Letter 4442-G/6207-E.

3. Attached to this declaration is a matrix identifying the data and information for which PG&E is seeking confidential treatment. The matrix specifies that the material PG&E is seeking to protect constitutes confidential market sensitive data and information covered by the Public

Utilities Codes section 454.5(g), D. 06-06-066, D.08-04-023 and/or relevant Commission rules.

The matrix also specifies why confidential protection is justified. Further, the data and information: (1) is not already public; and (2) cannot be aggregated, redacted, summarized or otherwise protected in a way that allows partial disclosure. By this reference, I am incorporating into this declaration all of the explanatory text that is pertinent to my testimony in the attached matrix.

I declare under penalty of perjury, under the laws of the State of California, that the foregoing is true and correct.

Executed on May 28, 2021, at San Francisco, California.

/s/

Matthew Braunwarth

**PACIFIC GAS AND ELECTRIC COMPANY’S (U 39 M)
ADVICE LETTER 4442-G/6207-E**

May 28, 2021

IDENTIFICATION OF CONFIDENTIAL INFORMATION

Redaction Reference	Category from D.06-06-066, Appendix 1, or Separate Confidentiality Order that Data Corresponds To	Justification for Confidential Treatment	Length of Time Date To Be Kept Confidential
Document: Advice Letter 4442-G/6207-E			
Confidential Appendix A: Independent Evaluator Report	<p>Item VIII) A) Bid information and B) Specific quantitative analysis involved in scoring and evaluation of participating bids.</p> <p>Item VII) B) Contracts and power purchase agreements between utilities and non-affiliated third parties (non-RPS)</p> <p>Public Utilities Code section 454.5(g)</p>	<p>The purpose of the Independent Evaluator (“IE”) Report is to determine on the basis of bid information whether PG&E’s conduct of the EE statewide new construction program fulfilled Commission requirements. The IE Report relies extensively on confidential information for its analysis and findings, so to provide as much information about the statewide new construction as possible without divulging market sensitive information.</p> <p>This appendix discusses, analyzes, and/or evaluates the confidential terms of the non-RPS contracts and confidential negotiations between PG&E and the counterparty. Disclosure of this information will provide valuable market sensitive information to market participants. Release of this information could be damaging to future PG&E contract negotiations and ultimately detrimental to PG&E’s customers.</p> <p>PG&E has redacted confidential bid information and quantitative analysis involved in scoring and evaluating the bids from the IE Report. A public version of the IE report has been filed with the Advice Letter. PG&E has complied with the requirement to facilitate the public availability of its energy efficiency procurement information by masking its confidential data. Accordingly, the confidential version of the IE report should be protected from public disclosure.</p>	<p align="center">3 years from May 28, 2021</p>
Confidential Appendix B: Solicitation Evaluation Criteria Scorecard and Program Savings Summary	<p>VIII) A) Bid information and B) Specific quantitative analysis involved in scoring and evaluation of participating bids</p>	<p>Appendix B provides the RFA and RFP evaluation criteria with associated scorecard weightings for each criteria and sub-criteria for PG&E’s 2019-2020 PG&E energy efficiency statewide new construction RFA and RFP. Appendix B also includes summaries of program savings and cost-effectiveness.</p>	<p align="center">Three years after CPUC approval</p>

**PACIFIC GAS AND ELECTRIC COMPANY'S (U 39 M)
ADVICE LETTER 4442-G/6207-E**

May 28, 2021

IDENTIFICATION OF CONFIDENTIAL INFORMATION

Redaction Reference	Category from D.06-06-066, Appendix 1, or Separate Confidentiality Order that Data Corresponds To	Justification for Confidential Treatment	Length of Time Date To Be Kept Confidential
– in its entirety		Disclosure of this information will provide valuable market sensitive information to market participants prior to the conclusion of ongoing negotiations. Release of this information could also provide sensitive solicitation strategy information and be damaging to future PG&E solicitations and ultimately detrimental to PG&E's customers.	
Appendix C: Statewide Workforce Education & Training Solicitation CWR selection spreadsheet – in its entirety	VIII) A) Bid information and B) Specific quantitative analysis involved in scoring and evaluation of participating bids Public Utilities Code section 454.5(g)	Appendix C provides a spreadsheet of all of the offers received in response to PG&E's 2019-2020 PG&E energy efficiency statewide new construction RFA and RFP. Appendix C also identifies those offers that were selected for the shortlist, contract negotiations, and contract award. Disclosure of this information will provide valuable market sensitive information to market participants. Release of this information could be damaging to future PG&E solicitations and ultimately detrimental to PG&E's customers.	Three years after CPUC approval
Appendix D: Contract and Contract Terms Summary – in its entirety	Item VII) B) Contracts and power purchase agreements between utilities and non-affiliated third parties (non-RPS)	These appendices contain the confidential contract summary and conditions of non-RPS contracts. Table 1: Table 1 includes the Confidential Summary Portion of the Bidders Proposed Compensation Type (Time and Materials, specific deliverables, quantity of installed measures, incremental savings payment, customer incentives and performance payments). Table 2: Table 2 includes the major contract provisions made to the standard form contract. The information contains confidential contract-related information exchanged between PG&E and the	Three years after CPUC approval

**PACIFIC GAS AND ELECTRIC COMPANY'S (U 39 M)
ADVICE LETTER 4442-G/6207-E**

May 28, 2021

IDENTIFICATION OF CONFIDENTIAL INFORMATION

Redaction Reference	Category from D.06-06-066, Appendix 1, or Separate Confidentiality Order that Data Corresponds To	Justification for Confidential Treatment	Length of Time Date To Be Kept Confidential
		<p>counterparty. Release of this market sensitive information could put PG&E at a competitive disadvantage with regard to other market participants and could detrimentally impact PG&E customers and/or may disclose confidential information provided in confidence by a third party to PG&E.</p> <p>Table 3: Table 3 includes the major contract provisions made to the modifiable form contract. The information contains confidential contract-related information exchanged between PG&E and the counterparty. Release of this market sensitive information could put PG&E at a competitive disadvantage with regard to other market participants and could detrimentally impact PG&E customers and/or may disclose confidential information provided in confidence by a third party to PG&E.</p> <p>Table B1: Table B1 contains program level cost effectiveness measures on an individual level. Releasing this market sensitive information could put PG&E at a competitive disadvantage with regard to other market participants and could detrimentally impact PG&E customers.</p> <p>PG&E has redacted market sensitive information. A public version of the Table B1 has been filed with the Advice Letter. PG&E has complied with the requirement to facilitate the public availability of its energy efficiency procurement information by masking its confidential data. Accordingly, the confidential version of Table B1 should be protected from public disclosure.</p>	

**PACIFIC GAS AND ELECTRIC COMPANY'S (U 39 M)
ADVICE LETTER 4442-G/6207-E**

May 28, 2021

IDENTIFICATION OF CONFIDENTIAL INFORMATION

Redaction Reference	Category from D.06-06-066, Appendix 1, or Separate Confidentiality Order that Data Corresponds To	Justification for Confidential Treatment	Length of Time Date To Be Kept Confidential
Appendix E: Executed Contracts	Item VII) B) Contracts and power purchase agreements between utilities and non-affiliated third parties (non-RPS)	These appendices contain the confidential terms and conditions of Third-Party Energy Efficiency Program Implementation Agreements. The information contains confidential contract-related information exchanged between PG&E and the counterparty. Release of this market sensitive information could put PG&E at a competitive disadvantage with regard to other market participants and could detrimentally impact PG&E customers and/or may disclose confidential information provided in confidence by a third party to PG&E.	Three years after CPUC approval

PACIFIC GAS AND ELECTRIC COMPANY

Approval of Strategic Energy Innovations Contract Resulting from Statewide Workforce Education and Training Career and Workforce Readiness Competitive Solicitation for Third-Party Energy Efficiency Customer Programs

PART 1 PUBLIC VERSION

May 28, 2021



Together, Building
a Better California

TABLE OF CONTENTS

ADVICE LETTER PART 1: PUBLIC SECTION	4
1. INTRODUCTION	4
<i>A. Purpose</i>	4
<i>B. Subject</i>	7
<i>C. Solicitation Process Overview</i>	13
2. TRANSITION PLAN FROM EXISTING TO NEW PROGRAM	29
3. CONFIDENTIALITY	30

ADVICE LETTER PART 1: PUBLIC SECTION

1. INTRODUCTION

A. Purpose

Pursuant to the California Public Utilities Commission (CPUC or the Commission) Decision (D.)18-05-041 – Decision Addressing Energy Efficiency Business Plans, and in accordance with the requirements and timeline described in D.18-01-004 – Decision Addressing Third Party Solicitation Process for Energy Efficiency (EE) Programs, Pacific Gas and Electric Company (PG&E) hereby submits this advice letter to seek Commission approval of the EE program implementation agreement (PIA or contract) between Strategic Energy Innovations (SEI) and PG&E resulting from PG&E’s statewide solicitation for the Third-Party (3P) Workforce Education and Training (WE&T) Career and Workforce Readiness (CWR) program.

As the designated lead Program Administrator (PA) for the WE&T CWR Program, PG&E is submitting this advice letter for the WE&T CWR Program to be implemented on behalf of California’s four Investor-Owned Utilities (IOUs) - Pacific Gas & Electric Company (PG&E), Southern California Edison (SCE), Southern California Gas Company (SCG or SoCalGas), and San Diego Gas & Electric Company (SDG&E).

Strategic Energy Innovations’ program, named Energize Careers (the Program), is a non-resource EE customer program that proposes to serve disadvantaged workers¹ (DW). With a current total program budget of \$5.96² million through December 31, 2025, the Program falls within PG&E’s 2018-2025 Business Plan annual budget levels approved by the Commission in D.18-05-041.³ The contract between PG&E and Strategic Energy Innovations was fully executed on May 21, 2021 and will contribute towards meeting

¹ D.18-10-008, p. B-9, “Decision Addressing Workforce Requirements and Third Party Contract Terms & Conditions”, defines a disadvantaged worker as “an individual that meets at least one of the following criteria: lives in a household where total income is below 50 percent of Area Median Income; is a recipient of public assistance; lacks a high school diploma or GED; has previous history of incarceration lasting one year or more following a conviction under the criminal justice system; is a custodial single parent; is chronically unemployed; has been aged out or emancipated from the foster care system; has limited English proficiency; or lives in a high unemployment ZIP code that is in the top 25 percent of only the unemployment indicator of the CalEnviroScreen Tool.”

² The Program has a 4-year term, but the budget is through December 31, 2025 in compliance with the current approved ABAL. Program services and budget after December 31, 2025 shall be contingent upon CPUC approving funding for PG&E’s energy efficiency program portfolio after 2025 and will require parties do a change order to add additional services and budget accordingly.

³ PG&E’s 2018-2025 Business Plan annual budgets were approved via D.18-05-041, p.2. The business plan budgets set expectations for the total annual EE portfolio spending and cost recovery budgets that are requested via an Annual Budget Advice Letter (ABAL) filed in September of each year (see D.15-10-028 pp.43, 62, and OP 4, p.123). The ABAL requests CPUC authorization of PG&E’s total EE portfolio budget for spending and cost recovery in the upcoming program year, and the ABAL EE portfolio budget is comprised of individual program budgets forecasted for the upcoming program year. The EE portfolio budget spending request is generally capped at the approved business plan budget for that program year, however an ABAL budget can exceed the business plan budget in a given year as long as PG&E’s cumulative budget for 2018-2025 remains within the total approved cumulative budget for 2018-2025 (D.18-05-041 OP 45, p.192). PG&E will include the annual forecasted Program budget in its upcoming ABAL portfolio budgets and expects these total ABAL portfolio budgets to fall within the current approved business plan annual portfolio budget caps.

PG&E's 60 percent third-party outsourcing compliance target.

I. Background

On August 18, 2016, the CPUC issued D.16-08-019 – Decision Providing Guidance for Initial Energy Efficiency Rolling Portfolio Business Plan Filings, which, for EE program purposes, defined the term “third-party program”⁴ and further defined the term “statewide”.⁵ Additionally, in D. 16-08-019, the Commission identified a list of programs to be administered statewide and laid out the basic structure of the requirements for statewide programs going forward.⁶

Pursuant to the Commission’s April 14, 2017 Scoping Memo and Ruling,⁷ PG&E filed its Solicitation Plan on August 4, 2017 which detailed the strategy and approach PG&E intended to implement for competitive solicitations and for building the new EE program portfolio.⁸ On January 11, 2018, the Commission issued D.18-01-004 – Decision Addressing 3P⁹ Solicitation Process EE Programs, which formalized the third-party solicitation process for EE programs and established key milestones on the path to maintaining a predominantly third-party implemented EE portfolio by 2023.

In D.18-05-041, the Commission approved PG&E’s EE Business Plan for 2018-2025 and assigned PG&E as the lead administrator for the WE&T Career and Workforce Readiness (CWR) statewide program. D.18-05-041 identified procurement and contract administration responsibilities for the lead PA.

In accordance with D.18-01-004,¹⁰ prior to launching any solicitations, PG&E first assembled a Procurement Review Group (PRG) composed of non-financially interested stakeholders to advise PG&E and provide oversight to all stages of the solicitation process. PG&E met with the PRG monthly to review solicitation progress. In accordance with D.18-01-004¹¹ and in consultation with the PRG, PG&E also solicited for and established a pool of five Independent Evaluators (IEs) with specific EE subject matter expertise to monitor the solicitation process for fairness and transparency, support PRG oversight efforts, and provide additional feedback to the IOUs. The Energy Division (ED) of the CPUC approved PG&E’s IE pool via letter to PG&E on August 31, 2018.¹²

In the third quarter of 2019, PG&E began preparations for the third-party CWR solicitation.

⁴ D.16-08-019, p. 111, Ordering Paragraph (OP) 10.

⁵ D.16-08-019, p. 109, OP 5.

⁶ D.16-08-019, pp. 62-64.

⁷ Scoping Memo and Ruling of Assigned Commissioner and Administrative Law Judges (April 14, 2017) p. 8 https://4930400d-24b5-474c-9a16-0109dd2d06d3.filesusr.com/ugd/0c9650_025db2dc8d354bb98df3cee59103a236.pdf

⁸ Pacific Gas and Electric Company Third Party Solicitation Proposal (August 4, 2017) p. 6 https://www.pge.com/pge_global/common/pdfs/for-our-business-partners/energy-efficiency-solicitations/PGE_Third_Party_Solicitation_Process_Proposal.pdf

⁹ Third-Party.

¹⁰ D. 18-01-004, pgs. 61-62, OP 3-4.

¹¹ D. 18-01-004, pgs. 62-63, OP 5.

¹² Edward Randolph Letter to Erik B. Jacobson regarding “Approval of Energy Efficiency Independent Evaluators.” August 31, 2018.

PG&E launched the CWR Request for Abstracts (RFA) in April 2020 with responses received and scored in May 2020. The CWR Request for Proposals (RFP) was issued in September 2020 with responses received and scored in October 2020. Throughout the solicitation process, PG&E worked closely with its PRG and its IE to ensure fairness, transparency, and compliance with all Commission directives and program rules.

Per D.18-01-004, the IOUs must meet the 60 percent outsourcing requirement by December 31, 2022. This program will contribute to PG&E's 60 percent outsourcing requirement.

II. The Solicitation is in Conformance with the State's Energy Policy Goals

PG&E's strategy for the CWR solicitation was to align with California's long term energy policy goal of maintaining a well-trained, highly skilled energy efficiency workforce. Additionally, recent CPUC rulemakings have focused on ensuring that the benefits of ratepayer investment in clean energy are equitable, and that people have access to information, training, services and support to overcome disadvantages and find good jobs in a clean energy economy.

The primary objectives of CWR are to prepare disadvantaged workers to enter the energy efficiency workforce and to place CWR program participants into energy efficiency jobs where they can use the knowledge and skills the training provided. CWR performs a critical role of improving awareness of and training disadvantaged workers for future energy efficiency employment. One of WE&T's Business Plan metrics is "Number of Career & Workforce Readiness (CWR) participants who have been employed for 12 months after receiving the training". CWR program implementer(s) will track and report on this metric.¹³

Program Goals:

Program Design: Energize Careers' objective is to prepare, place, and retain disadvantaged workers in energy careers. The Program is designed to provide participants with energy career training and empower participants to work as soon as employer training needs are met. The goal is all participants will receive an understanding of energy efficiency and related career pathways. The specific technical training content and length is reflective of the training provider and local labor market.

Innovative Program Features: To improve program effectiveness and increase customer

¹³ Program administrators are required to track disadvantaged worker participation in their programs. D.18-10-004, p. 78, OP 5.

participation, SEI has proposed the following innovative features into the Program.

- **IDSM:** Energize Careers will introduce disadvantaged workers to the full breadth of IDSM careers while focusing on energy efficiency related career training and placement in energy efficiency career pathways. The full breadth of IDSM workforce education and training is a key factor in shaping the extent to which building professionals achieve the ultimate goal of saving energy by making it core to their job functions.
- **Program Design:** IOU-supported energy-related training is available today to all demographics and limited utility collaborations with organizations that serve disadvantaged workers also exist. The Energize Careers program is new to the IOU portfolio of programs and provides statewide integrated training and job placement specifically targeted at disadvantaged workers.
- **Collaborative Approach:** This program will create regional collaboration from recruitment to training to wrap-around support services to placement and retention ensuring that supportive, tailored services are accessible for qualifying disadvantaged workers. In addition to the partners providing technical training to disadvantaged worker participants, Energize Careers will also collaborate with non-funded partners to support participants with wrap-around/social services. SEI will work with these partners to leverage support for soft and professional skills training, case management, and job placement services.
- **Tailored Support:** Tailored support in each region to meet the varying organizational needs across key regions in the state.
- **Overcome Barriers to Employment:** Provide support services, such as transportation subsidies, securing a driver’s license, improving English language skills, enhancing resume and interview skills, and related job placement services.

B. Subject

Table A below lists the contract award resulting from the negotiations following PG&E’s CWR solicitation. Per D.18-01-004, since the contract resulting from this solicitation has a term longer than 36 months and is valued above \$5 million, CPUC approval via Tier 2 advice letter is required.¹⁴

Table A: Contracts Resulting From PG&E’s Statewide WE&T CWR Solicitation			
		Budget ^(a) (\$M)	Duration (months)
1.1	Strategic Energy Innovations Energy Careers	\$5.96 M	53

¹⁴ D. 18-01-004, p. 61, OP 2.

The following Table B provides a detailed contract summary for the contract that is the subject of this advice letter. PG&E has included the contract sensitive information as part of the Confidential Section D.

Table B1.1 General Contract Summary – Strategic Energy Innovations Energize Careers		
1	Solicitation name	Third-Party Energy Efficiency Workforce Education and Training Career and Workforce Readiness Program
2	Type of program: local, regional or statewide	Statewide
3	Bidder's Proposed Compensation Type (Time and Materials, Deliverable Pricing, Milestone Pricing, and/or Hybrid)	[REDACTED]
	A. Direct Install/Downstream Customer Targeting (Yes or No)	No Direct Install, Yes Downstream Customer Targeting
	B. Customer Targeting brief description, if applicable	The target program participants for the SEI Energize Careers program are disadvantaged workers and training, outreach, and marketing efforts will be focused on regions with a high percentage of disadvantaged workers.
	C. Midstream/Upstream Market Actors receiving incentives (i.e., manufacturers, distributors, contractors, or other (specify).	No
4	Market/Sector(s)	Energy Efficiency job training for disadvantaged workers, as defined by The California Public Utilities Decision #18-10-008.
5	Customer Segment(s)	N/A
6	Third-Party Implementer/Subcontractor name	Strategic Energy Innovations
7	Name of program or service	Energize Careers

**Table B1.1 General Contract Summary – Strategic Energy Innovations
Energize Careers**

8	Brief description of program or service (2-3 sentences)	Energize Careers aims to create a diverse and representational energy workforce through the economic empowerment of people who experience systemic barriers to employment by helping them to access high-wage, high-growth energy career opportunities. The Energize Careers Program provides holistic services to support disadvantaged workers through technical training, job placement, and employment support. Energize Careers partners with pre-apprenticeship programs, apprenticeship programs, community-based training organizations, and community colleges to provide technical energy job training to underserved individuals, and we collaborate with wrap around service providers and industry partners to provide people with services and support to access career pathways into stable, living wage energy efficiency jobs.
9	Total kWh Energy Savings (First year, net) for each year contract in effect	N/A (This is a Non-Resource Program.)
10	Total MW Energy Savings (First year, net) for each year contract in effect	N/A (This is a Non-Resource Program.)
11	Total therms Energy Savings (First year, net) for each year contract in effect	N/A (This is a Non-Resource Program.)
12	Hard to Reach (HTR) Customers. Provide forecasted total number of HTR customer accounts (by customer segment) receiving program and total savings (net first year kWh, kW, and therms) to HTR customers from program over all years program in effect	This program is designed to effectively recruit, train, support, place, and track disadvantaged workers in energy jobs. In order to meet the needs of disproportionately impacted disadvantaged workers and communities, Energize Careers will work with community-based organizations that specialize in serving disadvantaged workers to ensure that disadvantaged workers in

**Table B1.1 General Contract Summary – Strategic Energy Innovations
Energize Careers**

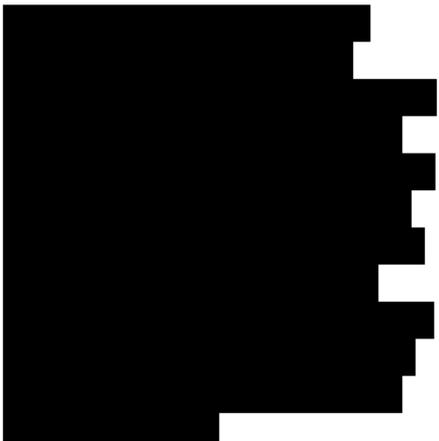
		<p>hard-to-reach and disadvantaged communities are informed and empowered to participate in the program, and that their unique, personalized needs are met. The Program does not include targets specific to HTR.</p>
<p>13</p>	<p>Disadvantaged Community (DAC)² Customers. Provide forecasted total number of DAC customer accounts (by customer segment) receiving program and total savings (net first year kWh, kW, and therms) to DAC customers from program over all years program in effect</p>	<p>This program is designed to effectively recruit, train, support, place, and track disadvantaged workers in energy jobs. In order to meet the needs of disproportionately impacted disadvantaged workers and communities, Energize Careers will work with community-based organizations that specialize in serving disadvantaged workers to ensure that disadvantaged workers in hard-to-reach and disadvantaged communities are informed and empowered to participate in the program, and that their unique, personalized needs are met. The Program does not include targets specific to DAC.</p>
<p>14</p>	<p>Forecasted Number of Customers Served by Program Year</p>	

**Table B1.1 General Contract Summary – Strategic Energy Innovations
Energize Careers**

		
15	Area(s) Served (including service territory, climate zones, cities, and/or counties, as applicable)	PG&E service territory, SCE service territory, SoCalGas service territory, SDG&E service territory
16	Program TRC ratio (CET output)	N/A (This is a Non-Resource Program.)
17	Program PAC ratio (CET output)	N/A (This is a Non-Resource Program.)
18	Program \$/kWh (TRC levelized cost, CET output)*	N/A (This is a Non-Resource Program.)
19	Program \$/kWh (PAC levelized cost, CET output)**	N/A (This is a Non-Resource Program.)
20	Program \$/therm (TRC levelized cost, CET output)*	N/A (This is a Non-Resource Program.)
21	Program \$/therm (PAC levelized cost, CET output)**	N/A (This is a Non-Resource Program.)
22	Budget: Forecast budget by program year (PY) for each year contract in effect	
23	Budget: Forecast expenditures by program year (PY) for each year contract in effect	
24	Budget: Total Program Budget	\$ 5,962,555 NOTE: The Agreement's CWA authorizing Implementer Program Term to render Services is until December 31, 2025. Program Services and budget after December 31, 2025 shall be contingent upon CPUC approving funding for PG&E's energy efficiency program portfolio after 2025. The authorized Program budget complies with the CPUC

**Table B1.1 General Contract Summary – Strategic Energy Innovations
Energize Careers**

		current approved ABAL and requires the Parties issue a change order to add these additional Services and budget after 2025.
25	Budget: If EE/DR component to the program, provide dollar amount and percent of total budget dedicated to EE/DR component	\$0 0% NOTE: While there is currently no budget associated with IDSM, PG&E intends to work with SEI to incorporate IDSM during program implementation.
26	Measure(s)	N/A (This is a Non-Resource Program.)
27	Savings Determination Type (i.e. custom, deemed, Net Metered Energy Consumption, or Randomized Control Trial)	N/A (This is a Non-Resource Program.)
28	Savings Calculation Method(s) (Meter-Based, Deemed, Calculated, Multiple and/or Other) If Multiple or Other, please specify	N/A (This is a Non-Resource Program.)
29	Contract start date and end date	08/01/2021* - 12/31/2025 *Estimated contract start date as CPUC approval is required. NOTE: The Agreement's CWA authorizing Implementer Program Term to render Services is until December 31, 2025. Program Services and budget after December 31, 2025 shall be contingent upon CPUC approving funding for PG&E's energy efficiency program portfolio after 2025. The authorized Program budget complies with the CPUC current approved ABAL, and requires the Parties issue a change order to add these additional Services and budget after 2025.
30	Program start date and end date. If program dates aren't defined by the period the program is open for customer participation, explain, and also include customer participation period.	

Table B1.1 General Contract Summary – Strategic Energy Innovations Energize Careers		
		
31	NAICS codes eligible for the program	N/A
32	Geographically areas served by the program	All California IOU service territories (PG&E, SDG&E, SCE, and SoCalGas)

C. Solicitation Process Overview

I. Solicitation Strategy & Design

As prescribed in D.18-01-004,¹⁵ PG&E designed a two-stage solicitation process that included an initial RFA solicitation stage followed by an RFP solicitation stage. To provide bidders with flexibility, the RFA was open in scope to promote innovative program concepts. Bidders were allowed to design and propose a program that would provide disadvantaged workers in the California IOU service territories with support services and technical training to enter the energy efficiency workforce. Additionally, bidders were encouraged to partner with and leverage the efforts of workforce development organizations for social services and non- energy efficiency skills training. Along with the outcomes sought, this solicitation sought abstracts that support the IOUs’ cost-effective program portfolio and contribute to WE&T’s overarching goals and metrics¹⁶.

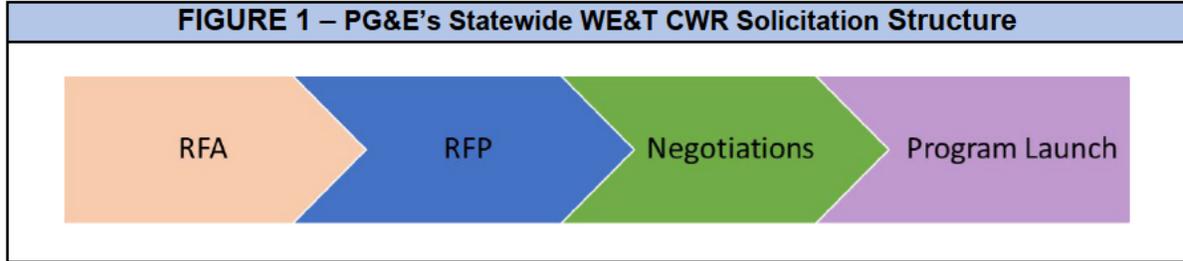
PG&E consulted the non-lead IOU PAs when developing the scope and requirements for the Statewide WE&T CWR RFA and RFP. The non-lead IOU PAs were not involved in the evaluation of any abstracts or proposals. PG&E as Lead-IOU PA was solely responsible for the end-to-end administration of the solicitation process and evaluation of the program

¹⁵ D.18-01-004, p. 57, Conclusion of Law (COL) 5.

¹⁶ PG&E Energy Efficiency Business Plan https://www.pge.com/pge_global/common/pdfs/for-our-business-partners/energy-efficiency-solicitations/PGE-Energy-Efficiency-Business-Plan.pdf and https://www.pge.com/pge_global/common/pdfs/for-our-business-partners/energy-efficiency-solicitations/PGE_EE_BusinessPlan.pdf

submissions.

The primary components of the solicitation process are depicted in *Figure 1 – PG&E Statewide WE&T CWR Solicitation Structure*.



One IE was assigned to observe the solicitation and is listed below in *Figure 2 – PG&E EE Independent Evaluator*. IE activities included the review of solicitation materials such as solicitation plans, solicitation language, evaluation criteria, solicitation procedural steps, solicitation scoring, and contracts, as well as monitoring of pre-bid meetings and contract negotiations to assist in implementing fairness and consistency with State of California statutes and Commission policies, guidance, and the IOUs' approved business plans. Regular communication via email and phone to discuss issues was the typical baseline engagement and ebbed and flowed dependent on the varying phase and intensity of activities during the solicitation process.

FIGURE 2 – PG&E EE Independent Evaluator	
Organization / Company	Independent Evaluator
Great Work Energy	Kim Crossman

II. Solicitation Stage 1: Detailed RFA Overview

The purpose of the RFA was to collect, evaluate, and identify high potential program concepts and advance those program concepts to the RFP stage of the solicitation. The rest of this section describes in detail the execution of PG&E's Statewide 3P WE&T CWR RFA process. A detailed RFA solicitation timeline can be found in *Figure 9 – RFA and RFP Solicitation Process Events*.

RFA Scope & Structure: CWR performs a critical role of improving awareness and training disadvantaged workers for future energy efficiency related employment. The RFA sought program concepts that would employ innovative approaches and strategies to provide disadvantaged workers in the California IOU service territories with support services and technical training to enter the energy efficiency workforce and to achieve stated program outcomes including:

- Targeted participants are disadvantaged workers;

- Participants learn about energy efficiency best practices that they will use on the job;
- Participants become aware of energy efficiency/energy education and career pathways;
- Participants are placed in jobs where:
 - The employer is undertaking energy efficiency work and/or energy efficiency projects,
 - The participant applies their energy efficiency related training within the first 6 months, and
 - Participants remain employed for at least 12 months;
- Workforce training programs introduce/expand energy efficiency content for their students;
- Partnering workforce development organizations' goals are met/supported;
- New collaborations are established between energy efficiency technical training organizations and organizations that provide case management and job placement services;
- Training provided is relevant, timely and practical for both current and near future industry needs; and
- Participant awareness of and preparation for emerging opportunities in a more integrated industry.

RFA Eligibility: The RFA was open to innovative program designs which were capable of providing disadvantaged workers in the California IOU service territories with support services and technical training to enter the energy efficiency workforce as well as developing partnerships with and leveraging the efforts of workforce development organizations for social services and non- energy efficiency skills training. Bidders could submit multiple program ideas. Each submission was limited in length to reduce the burden on solicitation participants to respond and to promote the efficient evaluation of the program submissions.

RFA Submission Format: A complete RFA submission consisted of four documents; a Narrative Response Form which was provided as a pre-formatted Microsoft (MS) Word document collecting text question responses; a Program Data Response Form which was a pre-formatted MS Excel worksheet to collect numerical program information and facilitate automated data extraction for quantitative analysis; a PDF version of the program Logic Model; and the Transmittal Letter. PG&E worked collaboratively with the IE during RFA development to:

- Minimize the information requested in the RFA stage;
- Ensure that the information collected was utilized appropriately;
- Confirm that the instructions were clear; and
- Confirm the RFA forms were simple, understandable, and complete.

PG&E required bidders to register and use the solicitation management platform PowerAdvocate when submitting documents or questions to PG&E.

RFA Evaluation Criteria: The RFA prompted bidders to provide descriptions of the proposed program design, innovative program features, team qualifications and prior relevant program experience. *Figure 3 – PG&E Statewide WE&T CWR RFA Evaluation Criteria* lists the various criteria and sub-criteria used to evaluate abstract submissions.

FIGURE 3 – PG&E STATEWIDE WE&T CWR RFA Evaluation Criteria	
RFA Scoring Criteria	Sub-Criteria
Program Concept	Alignment with Scope Program Design Innovation
Company Experience & Qualifications	Team Composition and Qualifications Prior Relevant Experience
Cost	Program Budget & Payment Structure

Each abstract submission received the same evaluation. Following evaluation of the RFA, participants with sufficiently high scoring abstract submissions were notified that they were shortlisted in the RFA and advanced further in the solicitation process.

RFA Final Document Review: In the months leading up to RFA launch, PG&E presented to the PRG its solicitation strategy, RFA structure, and evaluation approach for feedback. On March 24, 2020, PG&E presented to the PRG the completed RFA solicitation documents including the solicitation instructions, the scoring criteria, criteria weighting, and the RFA Narrative and Data response forms. During the final document review process PG&E collected a total of 16 comments and points of feedback from IOUs, IEs and the PRG regarding the proposed RFA process and the RFA solicitation documents. PG&E provided a response to each comment and explained what action, if any, it planned to take with each comment. A high-level summary of the feedback received during the RFA document review can be found in Section 1.C.IX.

RFA Launch: PG&E issued its Statewide WE&T CWR RFA solicitation on April 6, 2020 as planned. PG&E uploaded all RFA solicitation documents to PG&E’s EE Solicitations website

where they were available for download without needing to register in PowerAdvocate. PG&E raised awareness of the solicitation launch by posting a Contract Opportunity Announcement (COA) to the California Statewide IOU EE Proposal Evaluation & Proposal Management Application (PEPMA) website, the California Energy Efficiency Coordinating Committee (CAEECC) website, and relevant CPUC service lists.

RFA Pre-Bid Conference: The RFA Pre-Bid Conference was held on April 17, 2020 via webinar and 71 participants (inclusive of utility and Commission personnel) attended the conference via WebEx. This Pre-Bid Conference was a single bidder conference in which PG&E addressed both the WE&T Career Connections (CC) and WE&T CWR solicitations. The IE provided feedback on the presentation materials prior to the conference and monitored the discussion during the event for accuracy and fairness.

RFA Question and Answer Period: The deadline for bidders to submit written questions to PG&E via the PowerAdvocate platform was April 23, 2020. PG&E received 32 questions from bidders. PG&E uploaded responses to questions in PowerAdvocate for all bidders to access on April 30, 2020. High level observations of the questions received can be found in Section 1.C.VIII.

RFA Evaluation Team Training: The PG&E evaluation team was a committee composed of three PG&E evaluators who had a broad understanding of workforce education and training. Reviewers were screened for potential conflicts of interest before placement on the evaluation committee. Prior to receiving abstracts for evaluation, PG&E conducted a training session on May 11, 2020 with the evaluation team and IE to provide an overview of the evaluation process steps, an orientation to the RFA scorecard, and guidance on how to apply the scoring criteria consistently and fairly.

RFA Submission and Validation: On May 15, 2020, PG&E received 9 Abstracts from 9 unique counterparties submitted through the PowerAdvocate platform. Prior to scoring, each Abstract was reviewed for conformance with solicitation eligibility requirements which included: missing/incomplete solicitation documents; providing duplicate document uploads; exceeding the page limit requirements; or being outside the scope of this RFA. One Abstract was eliminated because the program design did not align with the RFA scope. A breakdown of the abstracts received can be found below in *Figure 4 – Breakdown of Abstracts Received*.

FIGURE 4 – Breakdown of Abstracts Received		
Abstracts Received	Non-Conforming	Abstracts Evaluated
9	1	8

RFA Evaluation: The abstract evaluation process started on May 18, 2020 and lasted for 2 weeks. Each Abstract was reviewed against the 6 evaluation criteria: alignment with scope, program design, innovation, team composition and qualifications, prior relevant experience, and program budget and payment structure. For each abstract, PG&E evaluation team

members individually assigned a preliminary score for each of the 6 evaluation criteria. The IE performed a parallel evaluation of each abstract.

RFA Calibration: After RFA evaluation, PG&E conducted calibration discussions across all scoring criteria and finalized abstract scores. Preliminary scores from the PG&E evaluation team members and the IE were collected and compared. Calibration discussions were an opportunity to discuss differences in scoring and evaluation team members could adjust preliminary scores based on the insights shared by others. The IE participated in these calibration meetings and also monitored to ensure the discussion did not impart unfair bias for/against any bidder. The process prioritized discussions on criteria with scores (including IE scores) with a total range of 2 between the maximum and minimum score. While the outcome of scoring calibration did not yield any significant shifts in the overall lineup, the discussions proved quite valuable in sharing knowledge across different teams and provided full transparency of the process to the IE.

RFA Final Scores: After the calibration discussions concluded, any scoring adjustments were recorded, and final abstract scores were calculated. Final scores only considered PG&E evaluation team scores and did not include any IE scores in the calculation.

RFA Shortlist: The process for shortlisting proposals was straightforward with PG&E advancing the highest scoring abstracts. PG&E did not have a predetermined number of submissions to advance and instead looked for natural breaks in the scoring to determine the shortlist. A breakdown of the shortlisted abstracts can be found below in *Figure 5 – PG&E’s Statewide WE&T CWR RFA Shortlist*.

FIGURE 5 – PG&E Statewide WE&T CWR RFA Shortlist			
Abstracts Received	Non-Conforming	Abstracts Evaluated	Advancing to RFP
9	1	8	3

PG&E dismissed 5 abstracts from the RFA and shortlisted 3 abstracts yielding an overall pass rate of 33% for the RFA.

III. Solicitation Stage 2: Detailed RFP Overview

The purpose of the RFP was to conduct a comprehensive evaluation of each program proposal and identify a shortlist to advance to contract negotiations. The rest of this section describes in detail the execution of PG&E’s Statewide 3P WE&T CWR RFP process. A detailed RFP solicitation timeline can be found in *Figure 9 – RFA and RFP Solicitation Process Events*, which is located in Section 1.C.V. (Solicitation Timelines)..

RFP Eligibility: Participation in the RFP was by invitation only and limited to the 3 bidders shortlisted in the previous RFA stage.

In the RFP, the proposals had to remain consistent with the program described in the

Abstracts. Bidders were asked to build on the program design submitted in the Abstract and provide additional information on partnerships, feasibility, and quantifiable metrics and outcomes.

Additional eligibility requirements included disclosing any potential conflict of interest as an IOU affiliate or any involvement as a CA EM&V program evaluator.

RFP Submission Format: A complete RFP submission consisted of a Narrative Response Form which was provided as a pre-formatted MS Word document collecting text question responses; a Program Data Response Form which was a pre-formatted MS Excel worksheet to collect numerical program information and facilitated automated data extraction for quantitative analysis; a revised program Logic Model; team resumes; letters of intent from committed Partners; examples of curriculum and/or (online) platforms; a transmittal letter; a Supply Chain Responsibility Exhibit; and the direct entry of the supplier sustainability questionnaire and Supply Chain Responsibility questions into the PowerAdvocate platform.

RFP Evaluation Criteria: In the RFP, bidders were requested to submit a program proposal that provided a comprehensive understanding of the program including a detailed description of the program design and logic, program management practices, aspects of program innovation, IDSM program features, proposed payment structures, program compliance requirements, and information responding to supply chain responsibility. *Figure 6 – PG&E Statewide WE&T CWR RFP Evaluation Criteria* lists the various sub-criteria used to evaluate each proposal submission.

FIGURE 6 – PG&E STATEWIDE WE&T CWR RFP Evaluation Criteria	
RFP Scoring Criteria	Sub-Criteria
Program Design	Innovation Marketing, Outreach and the Participant Experience Energy Efficiency Career Pathways Curriculum & Training Materials Geographic Reach
Program Feasibility	Schedule & Key Milestones Staffing & Management Partnerships Risk Mitigation Strategy KPIs Evaluability
Performance & Cost	Program Budget & Costs Quantifiable Outcomes Compensation
Supply Chain Responsibility	Diverse Supplier (includes SBE)

RFP Final Document Review: In the months leading up to RFP launch, PG&E presented the Statewide 3P WE&T CWR RFP structure and RFP scoring methodology to IOUs, IEs, and the PRG for early feedback. During the process, PG&E collected a total of 6 comments regarding the overall RFP process and the RFP documents. PG&E provided a response to each comment and explained what action, if any, it planned to take with each comment. A high-level summary of the feedback received during the RFP document review can be found in Section 1.C.IX.

On August 25, 2020, PG&E submitted the completed RFP solicitation documents including the solicitation instructions, the scoring criteria and weighting, and the narrative and data response forms for PRG's review prior to the issuance of the RFP.

RFP Launch: PG&E issued the Statewide 3P WE&T CWR RFP solicitation on September 4, 2020. Since participation in the RFP was by invitation only, PG&E notified bidders of the RFP directly via the PowerAdvocate platform and did not broadly circulate a contract opportunity announcement as was done for the RFA. As this was a 'closed' solicitation, PG&E provided all RFP solicitation documents to bidders through the PowerAdvocate platform only. PG&E plans to post original RFP documents to the EE Solicitation website after the Statewide 3P WE&T CWR contracting is concluded.

RFP Pre-Bid Conference: The RFP Pre-Bid Conference was held on September 9, 2020 via webinar and 54 participants (inclusive of utility and Commission personnel) attended the conference via WebEx. This Pre-Bid Conference was a single bidder conference in which PG&E addressed both the WE&T CC and WE&T CWR solicitations. The IE reviewed the presentation materials prior to the conference and monitored the discussion during the event for accuracy and fairness.

RFP Question and Answer Period: The deadline for bidders to submit written questions to PG&E via the PowerAdvocate platform was September 16, 2020. In total, PG&E received 29 questions (6 questions from Pre-Bid Conference, 23 questions via PowerAdvocate) from bidders. PG&E uploaded the responses to questions from the Pre-Bid Conference on September 15, 2020 to PowerAdvocate. Responses to bidder Q&A were uploaded by PG&E to PowerAdvocate on September 23, 2020 for all bidders to access. High level observations of the questions received can be found in Section 1.C.VIII.

RFP Evaluation Team Training: The PG&E RFP evaluation team consisted of 5 evaluators focused on the areas of program management in workforce education and training, EM&V and Supplier Diversity. Prior to receiving proposals for evaluation, PG&E conducted a training session on September 24, 2020 with the evaluation team and the IE to provide an overview of the evaluation process, orientation to the scorecard, guidance on how to apply the scoring criteria consistently and fairly.

RFP Submission and Validation: On October 2, 2020, PG&E received 3 proposals from 3 unique counterparties. Each proposal was reviewed for conformance with solicitation eligibility requirements prior to scoring. No proposals were rejected due to non-conformance

with eligibility requirements.

RFP Evaluation: In total 3 program proposals from 3 individual bidders were evaluated in the RFP. Individual scoring of proposals started in early October and lasted for 2 weeks. Each proposal was reviewed against the evaluation criteria and sub-criteria listed in *Figure 6 – PG&E’s Statewide WE&T CWR RFP Evaluation Criteria*. PG&E evaluation team members individually assigned a preliminary score for each sub-criterion within their area of specialization. The IE performed a parallel evaluation of each proposal.

RFP Calibration: On October 16, 2020 PG&E conducted calibration discussions across all scoring criteria. Preliminary scores from the PG&E evaluation team members and the IE were collected and compared. Calibration discussions were an opportunity to discuss points of disagreement observed in scoring and evaluation team members could adjust preliminary scores based on the insights shared by others. The IE participated in these calibration meetings and also monitored to ensure the discussion did not impart unfair bias for/against any bidder. The process prioritized discussions on criteria that exhibited high levels of disagreement and proposals with sub criteria scores (including IE scores) with a range between the maximum and minimum score of 1 or greater.

RFP Final Scores: After the calibration discussions concluded, any scoring adjustments from PG&E evaluation team members were recorded and final proposal scores were calculated. Final proposal scores only considered PG&E evaluation team scores and did not include any IE scores.

RFP Shortlist: On October 27, 2020, PG&E presented the RFP shortlist to the PRG and discussed the proposed shortlisting approach.

Instead of negotiating with all advancing bidders simultaneously, PG&E engaged the top-scoring bidder and only planned to expand negotiations to next tier bidders if negotiations faltered.

A breakdown of the shortlisted proposals can be found below in *Figure 7 – PG&E’s Statewide WE&T CWR RFP Shortlist*. PG&E dismissed 0 proposals from the RFP and shortlisted 3 proposals yielding an overall pass rate of 100% for the RFP.

FIGURE 7 – PG&E’s Statewide WE&T CWR RFP Shortlist			
Proposals Received	Non-Conforming	Proposals Evaluated	Advance to Negotiations
3	0	3	3

IV. Contract Negotiation Overview

Negotiations – Contracting: PG&E’s EE Program Implementation Agreement (PIA) served as the starting point for negotiation of an executable agreement. The contract form included flexible annual program realignment provisions and a performance contract management

framework. The contract was reviewed by the IE and presented to the PRG in the November 2020 monthly meeting. In contract negotiations, PG&E and bidders engaged in detailed discussions of pricing & compensation, performance contracting terms, key performance indicators (KPIs), program scope and budget, and other proposed changes to modifiable contract terms.

Final contract award occurred when both parties were able to reach mutually agreeable terms and that agreement also provided the best overall available benefits to California customers while effectively managing program delivery risk. PG&E holistically considered the proposed program benefits, overall program cost effectiveness, adoption of performance contracting terms, the inclusion of program innovation, historical bidder team experience, and overall risk mitigation approaches when making final contract award determinations.

WE&T CWR Negotiations: Below *Figure 8 – PG&E Statewide WE&T CWR Contract Awards* depicts the number of submissions that were actively engaged in negotiation discussions, how many were held as negotiation alternatives, and how many contracts were ultimately awarded.

FIGURE 8 – PG&E STATEWIDE WE&T CWR Contract Awards		
Active Negotiations	Negotiation Alternative	Contract Awards
1	2	1

As WE&T CWR negotiations were concluded, PG&E came to agreement on terms with 1 counterparty and executed 1 contract for 1 program. The contract will be allocated to PG&E’s 60% outsourcing compliance requirement.¹⁷ Negotiations with the top bidder were successful and discussions did not extend to alternates.

V. Solicitation Timelines

The following table depicts the planned timeline of solicitation events for PG&E’s Statewide WE&T CWR RFA and RFP compared to the actual timeline with notes on when and why deviations occurred.

FIGURE 9 – PG&E Statewide WE&T CWR RFA and RFP Solicitation Process Events			
Event	Planned Date	Actual Date	Notes
RFA Material Development Developed solicitation materials, evaluation criteria and definitions, and reviewed by IEs and PRG members.	Q1 2020	Q1 2020	

¹⁷ D.18-01-004 p. 61 OP. 1a

FIGURE 9 – PG&E Statewide WE&T CWR RFA and RFP Solicitation Process Events

Event	Planned Date	Actual Date	Notes
RFA Issued RFA documents were available to bidders on PG&E's EE Solicitation Website as well as PowerAdvocate for download.	April 2020	April 6, 2020	
RFA Pre-Bid Conference Conference made available via webinar to all interested participants. Registration was not required to attend this event.	April 2020	April 17, 2020	71 people attended via WebEx (inclusive of utility and Commission personnel).
RFA Q&A Deadline Deadline to submit written questions to PG&E in PowerAdvocate.	April 2020	April 23, 2020	
PG&E Q&A Response Deadline Deadline to respond to bidders' questions. bidders had access to all written questions and to PG&E's responses in PowerAdvocate.	April 2020	April 30, 2020	PG&E responded to 32 questions from potential bidders.
Abstract Submission Deadline Abstract submission due date. Registration in PowerAdvocate was required to submit an Abstract to PG&E.	May 2020	May 15, 2020	
RFA Evaluation and Scoring Scoring and Calibration	May-June 2020	May 18-29, 2020	
RFA Shortlist Finalized	June 2019	June 1-5, 2020	
RFA Shortlist Presented to PRG	June 2020	July 19, 2020	
RFA Shortlist Notification Bidders were notified whether their Abstract(s) were shortlisted through PowerAdvocate.	July 2020	July 2-3, 2020	PG&E notified 9 bidders regarding the status of their Abstract(s).

FIGURE 9 – PG&E Statewide WE&T CWR RFA and RFP Solicitation Process Events

Event	Planned Date	Actual Date	Notes
RFP Material Development Developed solicitation materials, scoring rubric, scoring elements and criteria and presented to and reviewed by IEs and PRG members.	Q3 2020	July-August 2020	
RFP Issued RFP documents were available to bidders in PowerAdvocate for download.	September 2020	September 4, 2020	Bidders were notified that the RFP was launched.
RFP Pre-Bid Conference Pre-Bid Conference event registration and webinar access instructions available in PowerAdvocate.	September 2020	September 9, 2020	54 people attending via the internet and/or by phone. PG&E received 6 questions from the Pre-Bid Conference and uploaded all responses on September 15, 2020.
RFP Q&A Deadline Written questions regarding the RFP were due to PG&E in PowerAdvocate.	Mid-September 2020	September 16, 2020	PG&E received 23 questions.
PG&E Q&A Response Deadline Bidders had access to review PG&E's responses to all written questions submitted in the RFP.	Late-September 2020	September 23, 2020	PG&E uploaded the responded to 23 questions to PowerAdvocate on September 23, 2020.
Proposal Submission Deadline Bidders Proposals submission due date. Registration in PowerAdvocate was required to submit a Proposal.	October 2020	October 2, 2020	
RFP Evaluation and Scoring Scoring and Calibration	October 2020	October 5-16, 2020	PG&E screened and scored 3 Proposals.
RFP Shortlist Presented to PRG	October 2020	October 27, 2020	3 Proposals advanced to negotiations.
RFP Shortlist Notification Bidders were notified whether their Proposal(s) were	November 2020 (tentative date)	November 11, 2020	PG&E notified 3 bidders regarding the status of their Abstract(s).

FIGURE 9 – PG&E Statewide WE&T CWR RFA and RFP Solicitation Process Events			
Event	Planned Date	Actual Date	Notes
Advancing through PowerAdvocate			
Contract Negotiations	November – December 2020 (tentative date)	December 2020 – March 2021	
Contracts presented to PRG	December 2020 – January 2021 (tentative date)	March 23, 2021	
Execute Agreements Parties negotiations and successful agreement with counterparties reflected in executed Agreements	January – February 2021 (tentative date)	May 21, 2021	
Advice Letter	February 2021 (tentative date)	May 28, 2021	

VI. Solicitation Marketing Outreach

To generate awareness of upcoming solicitation contracting opportunities in advance of a solicitation, PG&E utilized the following information distribution channels:

- PG&E Bidding Opportunities website;
- PG&E EE Third-Party Solicitations website;
- California Statewide IOU Energy Efficiency Proposal Evaluation & Proposal Management Application (PEPMA) website;
- California Energy Efficiency Coordinating Committee (CAEECC) website; and
- CPUC service lists (R. 13-11-005, A. 17-01-013, A.17-01-012).

PG&E also engaged in the following workshops and facilitated other activities to prepare and support potential bidders in preparation for the upcoming solicitations.

FIGURE 10 – Vendor Outreach Activities	
Event Date	Activity
June 16, 2017	CPUC Third-Party Solicitation Process Workshop (PG&E hosted)
September 18, 2017	Joint IOU Bidder Conference #1 (PG&E hosted)
November 2017	Joint IOU Bidder Conference #2 (SDG&E hosted)
January 31, 2018	Supplier Diversity Vendor Matchmaker Workshop (PG&E hosted)
March 6, 2018	Joint IOU Bidder Conference #3 (SCE hosted)

VII. Efforts to increase bidder’s awareness of the process and the tools/platforms used to communicate this opportunity.

In addition to the outreach and education efforts discussed in Section 1.C.VI, PG&E also strived to improve awareness and engagement with the solicitation process in the following ways:

- EE resources were provided on PG&E’s EE Solicitations website “Resources” tab. PG&E collected relevant EE reference materials on important CPUC Decisions, policies and other CA legislation, PG&E’s EE Portfolio, and PG&E’s solicitation strategy.
- RFA Solicitation documents posted to PG&E EE Solicitations website. PG&E made all RFA documents available on the PG&E EE Solicitations website when launching the RFA. This allowed any interested party to easily access and review the solicitation documents without having to register within PowerAdvocate. PG&E will post original RFP documents to the EE Solicitation website after the Statewide WE&T CWR contracting is concluded.

VIII. Communications with Bidders

Communications between PG&E and bidders were managed within the PowerAdvocate platform. Use of a single communications platform during a solicitation reduces the risk of conflicting information being shared in different venues, maintains a complete record of communications, and allows easy access for the IE to monitor discussion for bias. Communications with bidders in this process can broadly be categorized into two types: one-way communications and two-way communications. One-way communications were typically informational messages, instructions, or status updates from PG&E to the bidders that did not require a response beyond acknowledgement of receipt. Examples of one-way communications with bidders included mid-process status updates, and shortlist notifications. Two-way communications most often took the form of a question which required a response or a request for additional information. Most two-way communications occurred during the RFA Q&A period and the RFP Q&A period.

(a) RFA Question Themes Observed

At the RFA stage, PG&E received 57 questions from bidders and observed that the

questions focused on the RFA response format, solicitation process, and unique aspects of the RFA. In particular, the following themes were observed by PG&E in the RFA questions:

- **Program Budget and Compensation Structure:** Questions regarding allocation of program budget, scale of IDSM activities within the EE program, CPUC cost categories, and clarification of a deliverable-based compensation structure.
- **Program Design, and Eligibility:** Questions around eligible and ineligible program activities, target participants, and energy efficiency jobs. Additionally, questions requested clarification on type and nature of eligible and ineligible partnerships.
- **Program Objectives and Program Scope:** Clarification on the role and type of partnerships in the CWR program as well as the role of employment for participants.
- **Quantitative metrics, targets and goals:** Bidders requested insight into pre-established PG&E metrics, goals or targets associated with delivery of program outcomes and cost efficiency.

(b) RFP Question Themes Observed

In the RFP, PG&E observed the following question themes:

- **RFP Documents:** Clarifications of submission requirements, and acceptable formatting of forms.
- **Program Budget:** Questions on available budget and allocation of budget across the ramp up, implementation and ramp-down phases of the program as well as allowable costs and expenses.
- **Contract:** Questions on PG&E's compensation structure preferences.
- **Solicitation Process:** Questions on the expected timing for program launch and confidentiality of information submitted by bidders in their proposals.
- **Disadvantaged Worker Definition:** Clarity around application of definition of disadvantaged worker.
- **Statewide Program:** Clarification and detail regarding IOU geographic areas and boundaries for purposes of targeting participants.

PG&E provided responses to these questions during allotted Q&A for the solicitation.

(c) Other Key Communication Points

PG&E would like to point an additional other major topic that required a tailored communication approach:

- **Performance Contracting Framework:** The updated contract terms were shared with the IE and the PRG in advance of detailed contract negotiations. Significant time was taken during the initial negotiation kickoff meetings to walk bidders through the new proposed framework and PG&E provided detailed definitions and an excel tool to demonstrate how to model each term.

IX. Independent Evaluators

PG&E engaged one IE from the Commission's approved list of IEs for this Statewide WE&T CWR RFA/RFP process.

PG&E engaged the IE throughout the solicitation process. IE feedback was openly received, considered, and discussed. The principle areas of engagement with IE included:

- Review of solicitation documentation before the solicitation was issued;
- Independent evaluation of the abstract and proposal submissions;
- Shortlist development;
- Monitoring communications, feedback calls, and contract negotiations with bidders; and
- Reporting to the PRG and participation in monthly PRG meetings.

The final IE Contract Report¹⁸ is provided as Public Attachment A, and the supplemental final IE Contract Report is provided as Confidential Appendix A.

(a) Summary of IE input in RFA

Throughout the development of the RFA solicitation materials and during the review of final solicitation documents, the IE recorded in a comment tracker all input and recommendations to: the general instructions and response forms; scoring criteria and weightings; alignment between the scoring criteria and solicitation documents; and attended the Pre-Bid conference; and monitored communications with bidders and PG&E responses to bidder questions. PG&E generally accepted or partially accepted IE and PRG feedback. A summary of overall IE observations that PG&E incorporated into the RFA process included the following:

- Increased clarification of use of partnerships and avoidance of duplication in RFA general instructions;
- Increased clarification of incorporation of IDSM and of the program outcomes sought in RFA general instructions;
- Supported synthesis of solicitation background with key CPUC/legislative decisions,

¹⁸ "Given that we are not requiring that all third-party contracts be submitted for formal approval by the commission, we will require a formal IE report to accompany only those contracts required to be submitted via a Tier 2 advice letter." D. 18-01-004 p. 37.

references and definitions;

- Adjusted RFA scoring criteria allocating more weight to company experience and incorporation of program budget & payment structure in RFA phase.

(b) Summary of IE input in RFP

Throughout the development of the RFP solicitation materials and during the review of final solicitation documents, the IE recorded in a comment tracker all input and recommendations to: the general instructions and response forms; the scoring criteria and weightings; alignment between the scoring criteria and solicitation documents; attended the Pre-Bid conference; monitored communications with bidders and PG&E responses to bidder questions. PG&E generally accepted or partially accepted IE and PRG feedback. A summary of overall IE observations that PG&E incorporated into the RFP process included the following:

- Clarifications and corrections to bidder instructions in the RFP Data Response form;
- Increased clarification of the use of terms such as sub-contractor;
- Recommended removal of inapplicable requirements related to insurance;
- Increased clarification of contracting requirements and process.

(c) Summary of IE input in Negotiations

The IE reviewed the draft contract forms prior to kicking off contract negotiations. The IE also monitored communications between PG&E and bidders during Contract Negotiations to ensure discussions were conducted fairly.

2. TRANSITION PLAN FROM EXISTING TO NEW PROGRAM

Since this CWR program scope is new to the portfolio, it is not replacing any existing WE&T program. A separate, existing WE&T program is not affected by this new CWR program contract and will continue as summarized in *Figure 11 – Transition Plan* below.

Figure 11 – Transition Plan				
Transition Plan to New 3P Statewide Workforce, Education & Training Programs	EXISTING WORKFORCE, EDUCATION & TRAINING PROGRAMS			
	PrgID	Program Name	Subprogram Name / Program Common Name	Subsector
Not Replaced	PGE21071	Workforce Education & Training (WE&T)	Integrated Energy Education & Training (IEET)	n/a

3. CONFIDENTIALITY

In support of this advice letter, PG&E provides the following confidential information: executed Third-Party Implementer Energy Efficiency Program contracts, information about the participants and offers submitted in response to PG&E's Statewide 3P WE&T CWR RFP including the evaluation and analysis of the value of such offers, information and program metrics, financial and performance statistics of the parties, and the confidential results of the solicitation.

A Declaration Seeking Confidential Treatment is submitted in support of this advice letter, as required by D. 08-04-023, to demonstrate the confidentiality of material and to invoke the Commission's protection of confidential utility data and information provided under D.06-06-066 (see, Appendix 1, ("IOU Matrix")) and Appendix C D.08-04-023 or General Order 66-D.

Confidential Attachments:

Confidential Appendix A: Independent Evaluator Report (Redacted version included with public submittal)

Confidential Appendix B: Solicitation Process Overview

Confidential Appendix C: Statewide 3P WE&T CWR Selection

Confidential Appendix D: Third-Party Contract Summary

- a) Table 1 Contract Summary
- b) Table 2 and 3
- c) Table B1 (Redacted version included with public submittal)

Confidential Appendix E: Third-Party Contracts

Public Attachment A

Energy Efficiency Independent Evaluator's Final Report

PG&E Statewide Workforce Education & Training Career And Workforce Readiness Program

(Redacted)

May 28, 2021

MAY 21, 2021



FINAL SOLICITATION REPORT
PG&E STATEWIDE WORKFORCE EDUCATION & TRAINING
CAREER AND WORKFORCE READINESS PROGRAM

KIM CROSSMAN
GREAT WORK ENERGY LLC
Independent Evaluator

Table of Contents

- 1 SUMMARY 3**
- 2 INTRODUCTION 3**
 - 2.1 PURPOSE OF THE REPORT 3
 - 2.2 BACKGROUND: A TIMELINE FOR TRANSITION TO THIRD-PARTY EE PROGRAMS 4
 - 2.3 ROLE OF THE PRG AND IE IN THIRD-PARTY EE SOLICITATIONS 5
- 3 SOLICITATION OVERVIEW 6**
 - 3.1 OVERVIEW 6
 - 3.1.1 *Scope of Solicitation* 6
 - 3.1.2 *Objectives of Solicitation* 6
 - 3.1.3 *Milestones in the Solicitation Process* 6
 - 3.2 TIMING 7
 - 3.3 KEY OBSERVATIONS 8
- 4 REQUEST FOR ABSTRACTS11**
 - 4.1 RFA DEVELOPMENT 11
 - 4.2 BIDDER OUTREACH 11
 - 4.3 BIDDERS’ CONFERENCE AND Q&A 11
 - 4.4 RFA BIDDERS RESPONSE 12
 - 4.5 ABSTRACT SELECTION PROCESS 12
 - 4.5.1 *Bid Screening Process and Management of Deficient Bids* 12
 - 4.5.2 *Evaluation Team Profile* 12
 - 4.5.3 *Scoring Rubric Design* 13
 - 4.5.4 *Evaluation Processes and Scoring Calibration* 14
 - 4.5.5 *Abstract Selections* 15
 - 4.6 PRG AND IE FEEDBACK TO ABSTRACT PROCESS AND SELECTIONS 15
- 5 REQUEST FOR PROPOSALS 16**
 - 5.1 RFP DEVELOPMENT 16
 - 5.2 BIDDERS’ CONFERENCE AND Q&A17
 - 5.3 RFP BIDDERS RESPONSE17
 - 5.4 PROPOSAL SELECTION PROCESS17
 - 5.4.1 *Bid Screening Process and Management of Deficient Bids*17
 - 5.4.2 *Evaluation Team Profile* 18
 - 5.4.3 *Scoring Rubric Design* 19
 - 5.4.4 *Evaluation Processes and Scoring Calibration* 20
 - 5.4.5 *Shortlist and Final Selections* 21
 - 5.5 PRG AND IE FEEDBACK TO ABSTRACT PROCESS AND SELECTIONS 21
 - 5.5.1 *Adherence to PRG Guidance and Feedback* 21
 - 5.5.2 *Response to IE Feedback* 21
- 6 CONTRACTING22**
 - 6.1 CONTRACT NEGOTIATIONS 24
 - 6.1.1 *Collaboration on Final Program Design and Scope* 25

6.1.2	<i>Fairness of Negotiations</i>	25
6.1.3	<i>Changes to Contract Terms and Conditions</i>	26
6.1.4	<i>Uniformity of Contract Changes</i>	28
6.1.5	<i>Conformance with CPUC Policies and Objectives</i>	28
6.2	FINAL SELECTION	31
6.3	CONTRACT EXECUTION	31
6.4	PRG AND IE FEEDBACK TO CONTRACTING.....	32
7	IE ASSESSMENT OF FINAL CONTRACT	33
7.1	BID SELECTIONS RESPOND TO PORTFOLIO NEEDS	33
7.2	BID SELECTIONS PROVIDE THE BEST OVERALL VALUE TO RATEPAYERS.....	35
7.3	SUMMARY: OVERALL ASSESSMENT OF SOLICITATION	37

1 Summary

Beginning in January 2020, PG&E administered a two-stage solicitation for a third party, statewide, non-resource Career and Workforce Readiness (CWR) program serving disadvantaged workers. The solicitation concluded in May 2021 with a final contract executed with Strategic Energy Innovations (SEI) for the Energize Careers program, with a total budget of ~\$6 million supporting a three-year program implementation period.

Great Work Energy (GWE) was the Independent Evaluator (IE) assigned to monitor and report on the Career and Workforce Readiness solicitation. PG&E encouraged and enabled IE monitoring and feedback on materials, process steps and all decisions made throughout the process, without exception.

GWE found that PG&E was receptive to IE and PRG feedback and the process was transparent to IEs and PRG. PG&E treated all bidders consistently in the solicitation and outcomes were fair and appropriate. IE observations and assessments are detailed in this Final Report, and include:

- RFA and RFP materials were well designed, clear and straightforward to use.
- Market participation in the solicitation was modest but sufficient to support robust competition. Bidder response exceeded expectations for these specialized types of programs.
- Scored criteria reflected the most important characteristics and metrics sought from these approved WE&T programs. Scorecards incorporated feedback from the Independent Evaluators (IE) and Procurement Review Group (PRG).
- PG&E consistently applied the evaluation methodology to all bids to determine final scores and recommended shortlists.
- The negotiation process was fair, well managed and productive.
- The final negotiated program design retains all elements and aspects of SEI's original proposed program.
- The contract meets all of the goals and objectives laid out in the solicitation.

2 Introduction

2.1 Purpose of the Report

The Final Solicitation Report provides an assessment of the Pacific Gas and Electric Company's (PG&E or the Company) third-party energy efficiency (EE) program solicitation process and outcome by the assigned Independent Evaluator (IE). To be in compliance with California Public Utilities Commission (CPUC) direction, an individual report on the solicitation process resulting in any contract award \$5 million or greater and/or with a contract term of longer than three years is

required to be submitted along with the Tier 2 advice letter seeking Commission review of such contracts.

This report by Great Work Energy provides information on the statewide Career and Workforce Readiness solicitation process and outcomes, and assesses the fairness and transparency of these processes. The report is intended to accompany the contract and Advice Letter being submitted by the IOU for Commission review and approval and will be submitted to PRG.

The Career and Workforce Readiness solicitation was administered by PG&E in a joint, concurrent process with their other statewide WE&T solicitation for a Career Connections (CC) program that will serve K-12 students. While the programs are distinct in their target audience and objectives sought, they share many other attributes. Wherever possible, PG&E managed the solicitations' processes behind the scenes as a single, joint process, which reduced complexity for bidders who were participating in both solicitations and improved the quality and consistency of solicitation materials developed and evaluation processes. This approach also greatly reduced effort and time for PG&E staff, the assigned IE, Great Work Energy, and the PRG, versus what would have been required if the two solicitations were run as entirely separate processes. Given the small budgets available for these two programs, the approach PG&E took was an effective way to minimize administration costs for the two solicitations while still following all CPUC and PRG guidelines for third-party solicitations.

Readers may notice that much of the information provided by the IE in this CWR final report is identical or very similar to what is being reported in the CC final report. Where it occurs, this duplication between the two reports is not in error but is due to PG&E's joint administration of the two statewide WE&T program solicitations.

2.2 Background: A Timeline for Transition to Third-Party EE Programs

In August 2016, the California Public Utilities Commission (CPUC) adopted Decision 16-08-019, which defined a “third-party program” as a program proposed, designed, implemented, and delivered by non-utility personnel under contract to a utility program administrator. In January 2018, the CPUC adopted Decision 18-01-004 directing¹ the four California Investor-Owned Utilities (IOUs)—Pacific Gas & Electric (PG&E), Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), and Southern California Gas Company (SoCalGas)—to ensure that their EE portfolios contain a minimum percentage of third-party designed and implemented programs by predetermined dates over the next three years. Further directions were included in (D.) 18-05-041, which states:

“The third-party requirements of Decision (D.) 16-08-019 and D.18-01-004 are required to be applied to the business plans of the investor-owned utilities approved in this decision. All utility program administrators shall have at least 25 percent of their 2020 program year forecast budgets under contract for programs designed and implemented by third parties by no later than December

¹ Decision 18-01-004, OP 5.d

19, 2019.”

The IOUs are required by the CPUC to conduct a two-stage solicitation approach for soliciting third party program design and implementation services as part of the energy efficiency portfolio. All IOUs are required to conduct a Request for Abstract (RFA) solicitation, followed by a full Request for Proposal (RFP) stage.

In a letter dated November 5, 2019, PG&E requested an extension to June 30, 2020 to meet the 25 percent requirement to allow for sufficient time for a detailed and thoughtful contract negotiation stage for its Local Multi-Sector Request for Proposal (RFP).

In November 2019, the CPUC granted PG&E’s request for extension of time to meet the 25 percent threshold by June 30, 2020². The CPUC further stated that, consistent with D.18-05-041, the IOUs must meet at least 40 percent of their energy efficiency portfolios under contract for programs designed and implemented by third parties by December 31, 2020. No further extensions of time will be granted to the IOUs for meeting the third-party percentage requirements specified in Ordering Paragraph 4 of D.18-05-041.

At this time, the deadlines for meeting targets of 25% and 40% of EE funds outsourced to third parties have passed. The statewide WE&T program contracts are expected to be part of each IOU’s drive to meet the final 60% minimum target by 2022.

2.3 Role of the PRG and IE in Third-Party EE Solicitations

The CPUC requires each IOU to assemble an Energy Efficiency Procurement Review Group (EE PRG or PRG). The IOU’s EE PRG, a CPUC-endorsed entity, is composed of non-financially interested parties such as advocacy groups, utility-related labor unions, and other non-commercial, energy-related special interest groups. The EE PRG is charged with overseeing the IOU’s EE solicitation process (both local and statewide), reviewing procedural fairness and transparency. This oversight includes examining overall procurement prudence and providing feedback during all solicitation stages. Each IOU briefs its PRG on a periodic basis throughout the process on topics including RFA and RFP language development, abstract and proposal evaluation, and contract negotiations.

Each IOU is required to select and utilize a pool of EE IEs to serve as consultants to the PRG. The IEs are directed to observe and report on the IOU’s entire solicitation, evaluation, selection, and contracting process. The IEs review and monitor the IOU solicitation process, valuation methodologies, selection processes, and contracting to confirm that an unbiased, fair, and transparent competitive process is conducted that is devoid of market collusion or manipulation. The IEs are privy to viewing all submissions. The IEs are invited to participate in the IOU’s

² CPUC Executive Director letter to the IOUs regarding the “Request for Extension of Time to Comply with Ordering Paragraph 4 of Decision 18-05-041”, November 25, 2019

solicitation-related discussions and are bound by confidentiality obligations.

3 Solicitation Overview

3.1 Overview

The Scope and Objectives of the solicitation were summarized in the RFA and RFP General Instructions as follows:

3.1.1 Scope of Solicitation

“Bidders will design and propose to implement a statewide, non-resource WE&T Career and Workforce Readiness (CWR) program that provide Disadvantaged Workers in the California IOU service territories with support services and technical training to enter the EE workforce. Successful CWR program(s) resulting from the solicitation will partner with and leverage the efforts of workforce development organizations for social services and non-EE skills training. The annual budget available for this statewide CWR program solicitation is approximately \$2 million per year, for a three-year program implementation period.”

3.1.2 Objectives of Solicitation

“Bidders are requested to employ innovative approaches and strategies in order to achieve program outcomes including:

- Targeted participants are Disadvantaged Workers;
- Participants learn about EE best practices that they will use on the job;
- Participants become aware of EE/energy education and career pathways;
- Participants are placed in jobs where:
 - The employer is undertaking energy efficiency work and/or energy efficiency projects,
 - The participant applies their EE training within the first 6 months, and
 - Participants remain employed for at least 12 months;
- Workforce training programs introduce/expand EE content for their students;
- Partnering workforce development organizations’ goals are met/supported;
- New collaborations are established between EE technical training organizations and organizations that provide case management and job placement services;
- Training provided is relevant, timely and practical for both current and near future industry needs;
- Participant awareness of and preparation for emerging opportunities in a more integrated industry.”

3.1.3 Milestones in the Solicitation Process

The CWR solicitation was conducted in accordance with CPUC requirements as a two-stage (RFA/RFP) process, with robust IE engagement and regular coordination with the PRG on all aspects of the solicitation.

- The RFA process yielded 9 abstracts. The abstracts were screened, evaluated and scored, a shortlist was created and 3 were invited to participate in the RFP stage. The RFA process began in December 2019 with materials development and concluded in June 2020 with an approved shortlist to proceed to RFP and notifications to bidders.
- The RFP process yielded 3 proposals, which were screened, scored and ranked. The highest-ranking proposal was selected to move into active negotiations. The RFP process began in July 2020 with development of the CWR RFP documents and forms and concluded in November 2020 with bidder notification.
- The Contracting stage of the solicitation began in December 2020 when negotiations kicked off with the selected bidder. Negotiations concluded in March 2021 and a final contract was executed May 21, 2021.

3.2 Timing

Timing of key milestones in the solicitation process was generally in alignment with PRG Solicitation Guidelines, and was consistent with the shared IOU Dynamic Schedule that is posted on PEPMA and linked through the CAECC website. While there were some delays in the Contracting phase of the solicitation, the RFP stage had been executed quickly. Overall, the WE&T solicitation process up to Advice letter submission took a little more than a year, which is an improvement compared to the longer timelines seen in PG&E’s initial batch of third-party solicitations.

Table 3.1 Key Milestones	
Milestones	Completion Date
RFA Stage	
Solicitation Launch	April 6, 2020
Bidders Conference	April 17, 2020
Offer Submittal Deadline	May 15, 2020
RFA Shortlist to PRG	June 23, 2020
Shortlisting Notification	July 2-3, 2020
RFP Stage	
Solicitation Launch	September 4, 2020
Bidders Conference	September 9, 2020
Offer Submittal Q&A Period	September 4 – September 23, 2020
Offer Submittal Deadline	October 2, 2020
CET Cure Period	Not applicable – non-resource
RFP Shortlist to PRG	October 26, 2020

Shortlisting Notification	November 11, 2020
Contracting Stage	
Contracting and Negotiations Period	December 8, 2020 – March 10, 2021
Contracts Presented to PRG	March 23, 2021
Contract Execution	May 21, 2021

3.3 Key Observations

Table 3.2 Issues and Observations			
Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
Information needs observed in RFA scoring should be addressed in RFP to enable final selection: Budget.	Inconsistent bidder approaches to budgeting and outcomes made comparison and differentiation between program designs and value challenging in RFA scoring.	For RFP Ask all bidders to scale their programs and proposals to be in line with the budget available. Incorporate a question into the Narrative regarding scalability of the proposed program design. Focus heavily on quantifiable metrics.	PG&E agreed and included recommendation in the final RFP package and scorecard.
Information needs observed in RFA scoring should be addressed in RFP to enable final selection: Curriculum.	Development and/or leverage of existing curriculum is major aspect of scope, and multiple bidders proposed to develop online platforms to deliver this curriculum. Proposed approach was scored in RFA, but no samples of curriculum or other materials were requested for review. Difficult to gauge merit (professional, user-friendly, up to date) of proposed curriculum or platforms based on written description and without seeing a sample.	In RFP, request bidders provide samples reflective of proposed platforms, curriculum.	PG&E agreed and included recommendation in the final RFP package and scorecard.

Table 3.2 Issues and Observations

Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
<p>Effective Practice: Improved project management practices support negotiations and contracting</p>	<p>PG&E developed a matrix laying out the proposed schedule for review, revision and completion of each contract document by bidders and PG&E staff. The schedule for turn-around of deliverables by either party was reviewed and updated as needed in weekly negotiation meeting. Bidders expressed appreciation for having the information and actively used it to manage their own review and feedback to PG&E.</p>	<p>Continue this effective practice and consider adopting as standard/ common practice.</p>	<p>PG&E continued to use the matrix to support contract negotiations throughout the process. This appeared to decrease stress about the overall negotiations process, alleviated concerns about version control and supported all parties in proceeding effectively toward final agreements.</p>
<p>Effective Practice: Running two similar solicitations in a joint process reduces overall solicitation cost and effort.</p>	<p>PG&E managed the two WE&T solicitations' processes behind the scenes as a single, joint process. This reduced complexity for bidders who were participating in both solicitations and improved the quality and consistency of solicitation materials developed and evaluation processes. It also greatly reduced effort and time for PG&E staff, the assigned IE, Great Work Energy, and the PRG, versus what would have been required if the two solicitations were run as entirely separate processes.</p>	<p>Agree with PG&E approach and encourage this approach in the future: smaller, similar solicitations could be bundled into joint processes with single, assigned IE for efficiency of administration.</p>	<p>The approach PG&E took was an effective way to minimize administration costs for the two solicitations while still following all CPUC and PRG guidelines for third-party solicitations.</p>

4 Request for Abstracts

4.1 RFA Development

RFA documents were thoughtfully designed to strike an appropriate balance of gathering information that is essential for assessing abstracts, while not requesting the more detailed information that would be needed at the RFP stage. In addition to covering critical policy context, program scope and instructions for participation, the General Instructions provided bidders with insight into future requirements and long-term objectives of the solicitation, to inform their design of an effective program that could ultimately be successful in the solicitation. Information requested from bidders in the Narrative and Data Forms was narrowly constrained just to those items needed to assess if the abstract describes a program design, team and scale of effort that has the potential for success.

The IE, PRG and the other IOUs provided feedback and advice, which was incorporated as appropriate into the final RFA design and materials. There were no areas of disagreement, and PG&E adopted all recommendations.

4.2 Bidder Outreach

The Career and Workforce Readiness program is new and fairly specialized, requiring expertise in adult energy efficiency education, energy career pathways and existing social and employment-related services available to disadvantaged workers. PG&E expected a successful CWR RFA to result in [REDACTED] abstracts submitted.

To meet or exceed these expectations, PG&E took actions to notify potential bidders. PG&E published the solicitation and all associated materials on the PG&E solicitations webpage and in PowerAdvocate. PG&E also sent out notice of the solicitation to their supplier diversity service list and to a CPUC service list with wide distribution.

In addition to these standard outreach practices, WE&T staff worked with their peers from the other IOUs to develop a list of WE&T-specific organizations and contacts who received email notification about the RFA from PG&E Sourcing. The list included both organizations that might be potential bidders as well as entities that could further distribute information about the solicitation to potential bidders.

4.3 Bidders' Conference and Q&A

PG&E hosted a bidders' conference 11 days after posting the RFA solicitation, which was well attended and effectively facilitated. PG&E answered bidder questions received before, during and after the event quickly and accurately. PG&E solicited IE review and addressed feedback on answers prior to posting.

The bidders conference addressed both of the statewide WE&T solicitations that were in process (CWR and the Career Connections solicitation). Since there were some bidders and questions in common between the two solicitations, data reported in the table below reflect the combined totals.

Table 4.1 WE&T RFA Bidders Conference	
RFA Bidders conference date	April 17, 2020
Number of attendees	55 potential bidders
Number of questions received	94

4.4 RFA Bidders Response

Responses to the Request for Abstracts exceeded IOU expectations for participation.

Table 4.2 Solicitation Abstract Response	
	No.
Abstracts Expected	1
Abstracts Received	9
Abstracts Disqualified	1
Abstracts Shortlisted	3

4.5 Abstract Selection Process

4.5.1 Bid Screening Process and Management of Deficient Bids

The RFA General Instructions state that “abstracts will be disqualified for failure to comply with RFA instructions including, but not limited to:

- The abstract is substantively incomplete, does not follow formatting requirements or exceeds length limitations;
- The Abstract is not responsive to the objectives and requirements of this RFA;
- PG&E determines that a conflict of interest exists.”

To ensure fairness, PG&E did not take any actions to rectify deficiencies associated with individual bids during the RFA evaluation process. Bids were screened out or scored based on what was submitted.

No affiliate bids were received in the solicitation. Bidders were required to identify if they were a PG&E affiliate in the Data Response Form. PG&E checked the information submitted as one of the bid screening criteria in the RFA.

4.5.2 Evaluation Team Profile

PG&E recruited and trained qualified scorers.

- PG&E provided information about the qualifications of scoring team members to the IE for review, including name and current role in the company, bios and resumes. The teams appeared to be well qualified to effectively score the abstracts or proposals.
- PG&E provided score team training which familiarized reviewers with the components of the scorecard and RFA/RFP documents, goals and objectives of the solicitation, company procurement policies, and the third-party solicitation process and roles. Code of conduct rules were made clear to all scorers, particularly as it related to their day-to-day communications with implementers of existing programs who might also be bidding on new programs.
- PG&E recruited three internal scorers for evaluation of CWR abstracts. All scorers reviewed and scored the entire abstract. PG&E confirmed that scorers had no conflicts of interest, and there were no conflict-of-interest violations or issues identified by Great Work Energy during the scoring and calibration process.

Table 4.3 CWR RFA Evaluation Team		
Position Title	Position Role	Area Scored
[REDACTED]	[REDACTED]	All
[REDACTED]	[REDACTED]	All
[REDACTED]	[REDACTED]	All

4.5.3 Scoring Rubric Design

The scoring rubric developed for evaluation of abstracts was presented by PG&E for PRG review in March 2020 and was finalized as shown below prior to launching the RFA.

Table 4.4 RFA Scoring Rubric					
Tier 1 Criteria	Tier 2 Criteria	Scale	Tier 1 %	Tier 2 %	Max Points
Program Concept	Alignment with Scope	█	█	█	█
	Program Design	█		█	█
	Innovation	█		█	█
Organization, Experience & Qualifications	Team Composition	█	█	█	█
	Prior Experience	█		█	█
Cost	Program Budget	█	█	█	█
	Payment Structure	█		█	█
Total Score			100%		100

Scoring criteria and weightings proposed effectively met the IOU’s needs for this stage of the CWR solicitation and were well-aligned with PRG Guidelines for RFAs and CPUC direction regarding third-party programs. To retain the spirit and intent of the two-stage solicitation process, the emphasis of RFA scoring was on assessing program design and bidder qualifications. Requested cost information was at a high level in the RFA, and is considered indicative at this stage, so cost represented █ percent of the final score.

PG&E presented a draft of the RFA scoring criteria to PRG in January 2020 and received feedback stressing the importance of measurable outcomes and indicators to the success of this type of non-resource program. To reinforce that bidders should be designing programs to achieve measurable outcomes, PG&E edited the RFA instructions in multiple places to emphasize this need and requested that this information be provided as part of the program logic (outputs and outcomes) requested, which is scored under Program Design. Scoring of proposed program metrics is a more central and heavily weighted criteria in the RFP.

4.5.4 Evaluation Processes and Scoring Calibration

PG&E conformed with planned and established evaluation processes for the RFA.

- PG&E screened non-conforming bids according to their established and published bid screening criteria. █
█ Bids screened out were clearly, unequivocally non-conforming according to the published General Instructions for the RFA. One abstract submitted was determined to be ineligible in the CWR RFA, which is addressed in more detail below.

- PG&E evaluated abstracts using the established scoring criteria and processes, with no deviations. The integrity of the process was upheld throughout the review and scoring phase.
- GWE observed that PG&E scorers demonstrated diligence and care in their assigned individual scoring responsibilities and calibration meetings.
- The RFA scoring rubric supported identification of the most important strengths and weaknesses of the submitted abstracts and served well to distinguish between them.
- Calibration further clarified different interpretations of the scoring criteria or objectives of the solicitation, but there were only a small number of revisions made to individual scores or scoring notes during and following calibration.

[REDACTED]

4.5.5 Abstract Selections

Following individual score adjustments in calibration, PG&E applied the scoring rubric weightings to the PG&E scores to rank bids and develop the shortlist. The final stack of scores included clear, natural breaks between [REDACTED] abstracts. These were in alignment with the individual scorer’s evaluations of the bids, so the outcomes made sense to all reviewers. No adjustments were proposed or made; the shortlists proposed were simply based on the ranking of bids. After ranking based on weighted scores, the three top-scoring abstracts were selected to participate in the RFP.

4.6 PRG and IE Feedback to Abstract Process and Selections

PG&E was open and responsive to PRG and IE advice regarding the scoring rubric and methodology in the RFA. Overall, the narrow focus on program design and bidder qualifications in the RFA appeared well aligned with CPUC’s intent for lower complexity and effort in the first stage of solicitations. All IE and PRG recommendations were adopted.

There were no areas of disagreement between the IOU and the IE/PRG regarding RFA shortlist and bids selected to advance to RFP. The PRG and IE considered the RFA shortlist to be fairly and

appropriately drawn. PRG members had no feedback or further questions about PG&E's selections following the meeting.

Great Work Energy's assessment of individual bids and merits of the proposed shortlists lined up with the outcomes of PG&E's scoring process and resulting recommendations. Each abstract recommended to advance to RFP had the potential to eventually succeed in the solicitation.

5 Request for Proposals

5.1 RFP Development

The IE actively monitored PG&E's RFP development process, participating in internal and external meetings and providing real time feedback as documents were developed.

- The PMO team effectively engaged PG&E's internal WE&T team in detailed review and solicited their expert input on General Instructions, the Narrative Response Form and Data Response Form for both RFPs.
- PG&E solicited feedback on the full RFP packages from WE&T leads at the other IOUs in mid-August. The IOUs all responded with no comments or concerns.

GWE provided final review and confirmed that PG&E had addressed all outstanding, tracked comments on solicitation documents. Because of the collaborative development process, there were very few issues or tracked comments noted in IE review of the full RFP package. The documents directly addressed information needs that were noted following scoring of the WE&T RFAs (listed in Table 3.2 Issues and Observations), incorporated lessons learned from prior solicitations and were well-designed to support effective scoring and selection.

Great Work Energy reviewed documents against the new PRG Checklist for RFPs and confirmed that the most current PRG guidelines had been appropriately addressed within the RFP packages.

As was noted and discussed at the RFA stage of these solicitations, some of the PRG guidelines are not directly applicable for non-resource programs as written. For these items, PG&E consistently carried through decisions made at the RFA stage about how best to apply the guideline to these solicitations, and these were clearly identified for PRG in the RFP checklist. In particular, hard to reach and disadvantaged communities (HTR/DAC), Disadvantaged Workers, integrated demand-side management (IDSM), Innovation, Partnerships and Performance Payment topics all took on modified forms in the CWR RFP packages. The importance of these topics was not diminished, but they were tuned to better fit these particular solicitations. PG&E was thoughtful in this effort, and the PRG reviewed and confirmed that all items has been addressed effectively.

Following the PRG in August at which the RFP materials were presented, PG&E received two questions/concerns regarding the RFPs from PRG. In response to this feedback, PG&E made edits to RFP documents, including:

- Informing bidders that Business Plans would be updated in late 2021, but that changes were not expected to affect the overall vision, strategy or metrics for the WE&T programs.

- [REDACTED]

PG&E adopted all recommendations, and PRG had no further feedback or comments. The RFP package was posted to PowerAdvocate and the solicitation was launched on September 4, 2020.

5.2 Bidders’ Conference and Q&A

PG&E hosted a bidders’ conference within a week of posting the RFP, which was well attended and effectively facilitated. PG&E answered bidder questions received before, during and after these events quickly and accurately. PG&E solicited IE review and addressed feedback on answers prior to posting.

The bidders conference addressed both of the statewide WE&T solicitations (CWR and the Career Connections solicitation). Since there were some bidders and questions in common between the two solicitations, data reported in the table below reflect the combined totals.

Table 5.1 Bidders Conference	
RFP Bidders conference date	September 9, 2020
Number of Attendees	36 bidders
Number of questions received	47

5.3 RFP Bidders Response

Three proposals were received by the RFP due date of October 2. All bidders whose abstracts were invited into the RFP submitted a proposal.

Table 5.2 Solicitation RFP Response	
	No.
Proposals Expected	3
Proposals Received	3
Proposals Disqualified	0

5.4 Proposal Selection Process

5.4.1 Bid Screening Process and Management of Deficient Bids

The RFP General Instructions state that “proposals will be disqualified for failure to comply with

these RFP instructions which include, but are not limited to:

- The proposal was not invited to participate in the RFP by PG&E after having been selected in the Request for Abstract stage of the solicitation.
- The proposed program is materially different from what was described in the abstract selected, without explanation and justification.
- The proposal is substantively incomplete, does not follow formatting requirements or exceeds length limitations.
- The Proposal is not responsive to the objectives and requirements of this RFP.
- PG&E determines that a conflict of interest exists.”

As a first step of proposal evaluation, PG&E screened bids for eligibility according to these published screening criteria. [REDACTED]

5.4.2 Evaluation Team Profile

PG&E recruited three internal scorers for full evaluation of CWR proposals across all criteria (except Supply Chain Responsibility). In addition, PG&E recruited an internal EM&V subject matter expert to review and provide additional scores for the Evaluability criteria. The Supply Chain Responsibility criteria was evaluated and scored solely by the PG&E Sourcing department, using their standard methodology.

- PG&E provided information about the qualifications for scoring team members to the IE for review, including name and current role in the company, bios and resumes. The team appeared to be well qualified to effectively score the CWR proposals.
- PG&E provided score team training which familiarized reviewers with the components of the scorecard and RFP documents, goals and objectives of the solicitation, company procurement policies, and the third-party solicitation process and roles. Code of conduct rules were made clear to all scorers, especially as it related to their day-to-day communications with implementers of existing WE&T programs who were also bidding on new programs.
- RFP scoring prep included mock scoring and a mock calibration session that allowed the team to become familiar with the documents, practice applying the scoring methodology and build a shared understanding of the established scoring criteria.

Table 5.3 CWR RFP Evaluation Team		
Position Title	Position Role	Area Scored
[REDACTED]	[REDACTED]	All
[REDACTED]	[REDACTED]	All
[REDACTED]	[REDACTED]	All
[REDACTED]	[REDACTED]	Evaluability
[REDACTED]	[REDACTED]	Supply Chain Responsibility

5.4.3 Scoring Rubric Design

PG&E first presented a proposal scoring rubric for PRG feedback in June 2020. Scoring criteria and associated weightings incorporated lessons learned in prior solicitations with recommendations and identified needs from the RFA stage. [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED] The final scoring rubric developed for evaluation of proposals was presented by PG&E for final PRG review in July 2020 and is represented below.

Table 5.4 RFP Scoring Rubric					
Tier 1 Criteria	Tier 2 Criteria	Scale	Tier 1 %	Tier 2 %	Max Points
Program Concept	Innovation	■	■	■	■
	Marketing, outreach and participant experience	■		■	■
	EE career pathways	■		■	■
	Curriculum and training materials	■		■	■
	In-kind and/ or leveraged resources	■		■	■
Program Feasibility	Schedule and key milestones	■	■	■	■
	Staffing and management	■		■	■
	Commitment and clarity of role of Partners in proposed program	■		■	■
	Risk mitigation strategy	■		■	■
	Evaluability and KPIs	■		■	■
Performance & Cost	Program budget and costs	■	■	■	■
	Quantifiable outcomes	■		■	■
	Compensation structure	■		■	■
Supply Chain Responsibility	Diverse supplier	■	■	■	■
Total Score			100%	100%	100

[REDACTED]
[REDACTED] The established criteria were distinct and represented all of the most critical elements of the design, feasibility, cost and performance for this WE&T program.

5.4.4 Evaluation Processes and Scoring Calibration

PG&E evaluated proposals using the established scoring criteria and processes, with no deviations. The integrity of the process was upheld throughout the review and scoring effort. Individual scoring occurred between October 5th – 13th and the scoring calibration meeting was held on October 16, 2020.

Different impressions of a proposal’s merits or deficiencies were surfaced and discussed in calibration [REDACTED] Discussions in these meetings indicated that scoring team training and other preparation work had laid a strong foundation for alignment in the reviewers’ understanding of the RFP objectives and established

criteria.

Using the same methodology as the PG&E scoring team, GWE reviewed and shadow-scored all submitted proposals across all criteria and participated in calibration discussions.

5.4.5 Shortlist and Final Selections

[REDACTED]

[REDACTED]

[REDACTED] There were no exceptions made to rankings after calibration. [REDACTED]

PG&E's scoring and the resulting ranking of bids seen in the final scores aligns closely with GWE's evaluation of the bids. In particular, the proposal ranked highest based on PG&E final scores was also the highest ranked in IE scores as well. This was clearly a strong proposal, with program design, feasibility and outcomes that directly and fully addressed all objectives of the solicitation.

5.5 PRG and IE Feedback to Abstract Process and Selections

5.5.1 Adherence to PRG Guidance and Feedback

PG&E was open and responsive to PRG and IE advice regarding the RFP scoring rubric and methodology. All IE and PRG recommendations were adopted. In the RFP, PG&E designed a scoring rubric that appropriately prioritized and valued all of the most important elements and attributes of a future, successful CWR program.

PG&E's execution of bid evaluation and selection for the WE&T RFP solicitations met all PRG guidelines pertaining to the scoring rubric and methodology, scoring team characteristics and training, and the individual scoring, calibration and shortlist processes.

PG&E presented the WE&T shortlists to PRG on October 28th [REDACTED]

[REDACTED]

[REDACTED] No additional PRG feedback was received following the meeting, and PG&E notified all bidders of their status via PowerAdvocate on November 11th.

5.5.2 Response to IE Feedback

As described in the preceding sections, PG&E was open and responsive to IE advice and feedback throughout the RFP process.

Results of considering the PRG Guidelines Appendix J: IE Question Template for Scoring Review and Monitoring are summarized below.

Table 5.5: IE Scoring Review and Monitoring	
Question	IE Assessment
Was there a conflict of interest with any of the scorers?	No
Was it a fair process?	Yes
Do you agree with scoring? <ul style="list-style-type: none"> If not, was it resolved? If it was resolved, how? If it wasn't, what are next steps? 	Yes
Were there major differences of opinion within the scoring team? If so, why?	[REDACTED]
Did the IOU articulate a clear philosophy about how many abstracts/proposals to advance to the next phase?	Yes.
Does the IOU's approach to drawing the line make sense and comport with the overall goals of the two-stage solicitation process?	Yes
Did the IOU adhere to its plan?	Yes
Did the IOU identify the marginal cases (hard calls)? <ul style="list-style-type: none"> Did the marginal cases that the IOU identified match your own identifications? Did the IOU have a robust discussion about what to do with the marginal cases? 	[REDACTED]
Things to fix moving forward? <ul style="list-style-type: none"> Did the bid review and scoring reveal any places where the solicitation instructions were unclear or incomplete? 	Nothing to fix, it worked well.

6 Contracting

In preparation for negotiations, PG&E modified their standard contract templates as appropriate for these specific statewide, non-resource WE&T programs. The structure of the package and function of each section was the same as prior PG&E contracts reviewed by PRG in 2020.

- The Program Implementation Agreement (PIA) and Attachment 1 Program Requirements (Att 1) form the master services agreement. These documents contain all of the CPUC and PG&E contract terms and conditions. PG&E prepared a matrix accompanying these documents that maps CPUC standard terms to their location in the templates, and clearly identifies in redline changes that PG&E had made to some of the modifiable terms.
- Attachment 2 Narrative and Attachment 2 Data Form are the Scope of Work for the program being contracted. As templates, they are basically just outline headers and blank tables, which align with sections of the proposals submitted by bidders. During negotiations, Finalists transfer their proposals into these forms, where applicable incorporating mutually agreeable changes that come out of negotiation discussions with PG&E.
- Compensation structure follows what was laid out in the RFP, [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
- Funding for the program described in Attachment 2 is disbursed annually through contract work authorizations (CWAs) with associated purchase orders (POs). Through this mechanism, goals and budgets for an upcoming year will be considered in light of current performance and forecasts and can be adjusted if appropriate. The total contract amount is capped across the contract period at the not-to-exceed (NTE) total budget amount listed in Attachment 2 Data Form, Budget and Compensation tabs.

PG&E provided Great Work Energy with the full set of draft WE&T contract templates on November 6th, allowing a week for thorough IE review of the documents and a second week for clarification and discussion on issues identified, revisions and final confirmation of changes made.

- The CPUC standard terms and conditions were appropriately addressed in the contract templates. Unmodifiable terms incorporated changes made in response to feedback on prior third-party EE solicitations and were compliant with requirements. Modifiable terms were appropriately altered to reflect these WE&T solicitations or in some cases omitted where they are not applicable to non-resource programs, as discussed with PRG during the RFA and RFP processes. The matrix PG&E provided in negotiations along with the contract templates allowed Finalists to see the CPUC standard term with PG&E's proposed redline and be able to address this as the starting point for negotiations.

- The PRG Guidelines checklist was updated to reflect PG&E’s full alignment with the PRG Guidelines pertaining to contract templates. The completed Checklist was provided along with the package of contract templates for PRG review.
- All GWE comments on the WE&T contract templates were sufficiently addressed by PG&E prior to distribution to the PRG, and the Comment Tracker provided to PRG for review reflected this assessment. PG&E adopted multiple modest changes recommended by the IE. For items where PG&E only partially accepted or did not accept GWE’s specific recommendation, the underlying concern being flagged by the IE was addressed by PG&E differently or elsewhere in the documents, effectively.

The planning, organization and rapid execution of this task by PG&E was commendable. Finalists entering negotiations in December received well-structured contract templates that effectively supported negotiations.

6.1 Contract Negotiations

Negotiations began December 8, 2020 with a kick-off meeting with finalist SEI. A second meeting was held on December 15th, where the contract templates were introduced. These initial meetings were well organized and executed. After a holiday break, weekly negotiation meetings and follow-up communications via PowerAdvocate continued to be executed well and consistently by PG&E. All parties engaged actively and cooperatively in negotiations, and there was consistent forward progress.

PG&E had communicated a target of reaching negotiated agreement with Finalists in both WE&T solicitations by late January, with contracts coming to PRG for review in February. At the end of January, it appeared that everything substantive had been addressed in negotiations to all parties’ satisfaction and that PG&E was on track to meet this schedule. But a bidder question about marketing requirements in the contract that seemed fairly simple led to a more complicated internal inquiry at PG&E regarding marketing requirements for statewide programs, including co-branding requirements and auspices statements. PG&E introduced this topic for consideration by a cross-IOU Statewide coordinating committee and hoped to reach resolution quickly in order to include language in these contracts. This created a delay in finalizing WE&T contracts within the timeline laid out for IE and PRG review in February.

PG&E managed bidder communications regarding this delay well. On January 28th, PG&E met with SEI to explain the issue and delay. They discussed potential schedule impacts and reassured the bidder of PG&E’s intent to proceed quickly in either settling or deferring this minor issue, so as not to impact the date of planned program launch. While negotiations paused, PG&E maintained weekly communications with bidders throughout this period. On February 17th, PG&E communicated via PowerAdvocate that they hoped to have resolution of the marketing requirements by early the following week and were intending to bring draft contracts for PRG review in March.

PG&E reached negotiated agreement on all contract elements with SEI on March 11, 2021. From the beginning of negotiations to their conclusion, PG&E hosted [REDACTED] negotiation meetings with SEI, representing [REDACTED] hours of discussion, and the parties exchanged [REDACTED] messages and files through PowerAdvocate.

6.1.1 Collaboration on Final Program Design and Scope

The final program scope retains all aspects of the Implementer’s original proposed program design. In negotiations, PG&E program staff emphasized gaining a shared understanding of what was planned, [REDACTED] PG&E asked clarifying questions and requested changes in language as needed to better support progress tracking and reporting, [REDACTED] and evaluating outcomes for the program that SEI designed.

Contract terms associated with program curriculum, communications and materials were a focus of negotiations [REDACTED]

[REDACTED]

[REDACTED]

6.1.2 Fairness of Negotiations

The negotiation process that bidders experienced was planned and executed consistently. PG&E used effective project management practices to support a more transparent, less stressful negotiation process. [REDACTED]

[REDACTED] There was no evidence of either positive or negative bias in negotiations. GWE’s assessment is that both the negotiation process and its outcomes were fair. IE observations supporting this assessment include:

- PG&E invited the single top-scoring finalist from the RFP into active negotiations, and they were ultimately successful at reaching mutually agreeable terms.
- PG&E communicated regularly, consistently and transparently with SEI regarding the status of negotiations, including schedule, contract documents and outstanding topics under discussion.

- PG&E staff quickly and thoughtfully reviewed the scope of work information and questions posed by SEI and came to negotiation meetings prepared to discuss these.
- The tone set by PG&E staff in all negotiations meetings was collaborative, curious and respectful of SEI's expertise and proposed role as the third-party designer and implementer of the program. GWE witnessed this same attitude consistently maintained behind the scenes in internal PG&E negotiation team meetings.
- SEI participated in the process capably and consistently. They responded quickly to requests for information about their proposed program [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

6.1.3 Changes to Contract Terms and Conditions

CPUC standard terms are unmodified in the final contracts. They are identical to the Statewide WE&T contract templates provided to PRG for review in November 2020, and other IOU terms in the PIA and Attachment 1 do not supersede them.

Few CPUC modifiable terms were revised in the final contract. The only material change is in the [REDACTED] All other CPUC modifiable terms not listed below were identical to the contract templates.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Outside of the CPUC terms, there were only a few other changes negotiated to the PIA and Attachment 1 terms and conditions.

- Attachment 1 Section 4.1.6 Implementer Program Materials section had a major update, addressing marketing requirements including co-branding and required disclosure statements. Exhibit B item 3.A also added auspices disclosure statement. [REDACTED] [REDACTED] Disclosure requirements were not included in original contract template.

[REDACTED]

- Attachment 1 Section 2.3.5 Program Eligibility was updated to clarify eligibility requirements for these particular programs. Contract template was general, PG&E developed and added specific language in response to questions from bidders in negotiations.

[REDACTED]

Few changes were made to what SEI had originally proposed in the final negotiated Scope of Work (Attachment 2 Narrative and Attachment 2 Exhibit A Data Form).

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

6.1.4 Uniformity of Contract Changes

[REDACTED] Contract changes made, described above, were uniformly aligned with what had been discussed and agreed to in negotiations.

The two statewide WE&T solicitations shared the same contract template. During negotiations, in a few cases, changes made in one due to finding typos or omissions in the template were also updated in the other contract [REDACTED]

6.1.5 Conformance with CPUC Policies and Objectives

The solicitation was designed to effectively source a statewide third-party CWR program that will meet the needs laid out in PG&E's approved Business Plan and contribute to meeting WE&T overarching goals and metrics.

As planned and executed, the solicitation process was in accordance with the CPUC-adopted IOU Solicitation Plan, including using a two-stage RFA/RFP process and allowing IE/PRG monitoring and feedback on all aspects of the solicitation.

Program Evaluability: For some non-resource programs, evaluation of outcomes can be a challenge, and this was a concern was raised by PRG members for these WE&T program solicitations. Program evaluability was a scored criterion in the RFP and also a major PG&E focus in negotiations. PG&E informed SEI that a CPUC evaluation contractor would be reviewing the evaluability of the program before or soon after program launch. Through discussion and mutual agreement, edits were made during contract negotiations to refine and better define the program's quantifiable outcomes and KPIs. In addition to improving evaluability, [REDACTED]

Disadvantaged Workers: Decisions D.18-05-041 and 18-10-008 define Disadvantaged Workers and lay out requirements for including and tracking jobs for Disadvantaged Workers in third party EE resource programs. While these requirements do not apply to the non-resource CWR program, its primary purpose is to increase awareness, knowledge and employment of Disadvantaged Workers in EE career pathways. As was required in the solicitation, the entire program design is based on

solicitation process³. PG&E’s performance against these timelines is represented in the table below.

Regarding the timeliness of the solicitation schedule reported below, GWE would like to emphasize that the overall two-stage solicitation timeline for both WE&T solicitations was just over a year, which is an improvement when compared to PG&E’s initial set of third-party solicitations. PG&E’s efficiency and speed in the RFP stage offset some of the delays that occurred in the Contracting phase and resulted in a reasonably timely solicitation overall.

PG&E’s perspective on the recommended 12-week timeline for the contracting stage is that it not realistic, as it does not appear to include time for internal PG&E contract approval processes that come after IE and PRG review of the final contract, and before contract execution. GWE agrees with this assessment and recommends that CPUC ED update the recommended maximum timeline for the Contracting stage of solicitations to 16 weeks to provide a more achievable but still accelerated target for IOUs.

Table 6.1: Timeliness of Solicitation Schedule			
Solicitation Stage	CPUC Recommended Maximum Timeline	Actual Timeline of CWR Solicitation	IE Assessment of Delays or Discrepancies
RFA	Up to 12 weeks from RFA release to notification of bidder notification of selection for RFP	12.5 weeks	[REDACTED]
RFP	Up to 15 weeks from RFP release to bidder notification of invitation to contract negotiation	9.5 weeks	[REDACTED]
Contracting	Execute contract by 12 weeks after invitation to contract negotiation (unless there are specific complexities or challenges)	27 weeks	[REDACTED]

³ CPUC Executive Director letter to the IOUs regarding the “Request of Time to Comply with Ordering Paragraph 4 of D.18-05-041,” November 25, 2019

Table 6.3: Bids Selected for Contract Execution			
Bidder	Bid#	Years	Program
SEI	3	■	Energize Careers

6.4 PRG and IE Feedback to Contracting

Negotiations and contracting efforts by PG&E comported with PRG guidance⁴ related to negotiations, contracting and final contract review, including the following:

- PG&E had presented the planned contract negotiation process to the IE and PRG for feedback in October and November. The process executed was in line with what was planned.
- GWE monitored all electronic communication and document exchange via PowerAdvocate and attended all negotiation meetings, both those with the bidders and the internal PG&E negotiations team planning and debrief meetings.
- PG&E explained the steps in the negotiation process and provided a timeline in the first two negotiation meetings with the bidder.
 - **Effective Practice:** PG&E developed and shared a proposed schedule for review, revision and completion of each contract document by bidders and PG&E staff. This improved transparency and provided a good basis for project management of the negotiation process. The schedule for turn-around of deliverables by either party was reviewed and updated as needed in each weekly negotiation meeting. Bidders repeatedly expressed appreciation for having this information, and actively used it to manage their own rounds of review and feedback to PG&E. This appeared to decrease stress about the overall negotiations process, alleviated concerns about version control and supported all parties in proceeding effectively toward final agreements.

Great Work Energy monitored all negotiation meetings and communications between SEI and PG&E via PowerAdvocate throughout the negotiations period, from December through March. There were no gaps in IE monitoring of negotiations and emerging issues were reported in a timely fashion to PRG in the IE monthly report. There were no outstanding issues as of the conclusion of negotiations.

- Throughout the negotiations phase, GWE tracked proposed modifications to the contract template, by either party. GWE also monitored dialogue about the program design, outcomes and commercial terms that were proposed at the RFP stage.

⁴ PRG EE Solicitation Guidelines, Sections 3.6, 6.2, 6.3 and Appendix L

- Detailed review was performed on all final contract documents (PIA, Attachment 1, Attachment 2 (Scope of Work) Narrative and Attachment 2 Data Form) for the solicitation between March 11th – March 18th. GWE compared the final contracts to the WE&T contract template (reviewed by PRG in November 2020) and associated matrix of CPUC terms and conditions, IE negotiation meeting notes, files and communications exchanged through PowerAdvocate during negotiations, and the original proposal that bidders had submitted.
- GWE did not uncover any issues that would prevent contract execution or indicate that a revision was needed to any contract documents prior to contract execution.

7 IE Assessment of Final Contract

The final contract provides a good basis for administration and performance management, for both PG&E and SEI. [REDACTED]

[REDACTED] Changes agreed to in negotiations were all included in the final Attachment 2 Data Form and Narrative.

The final program scope, objectives and outcomes are consistent with what was sought in the solicitations, and with the approved business plans and metrics that the RFA/RFP was based on.

The program scope, cost and metrics are entirely consistent with what was discussed and agreed to between Parties in the negotiation process.

The final program scope retains all aspects of SEI’s original proposed program design. In negotiations, PG&E staff emphasized gaining a shared understanding of what was planned. PG&E asking clarifying questions and requested changes in language as needed to [REDACTED]

CPUC standard terms are unmodified in the final contracts. They are identical to the Statewide WE&T contract templates provided to PRG for review in November 2020, and other IOU terms in the PIA and Attachment 1 do not supersede them.

Few CPUC modifiable terms were revised in final contracts. [REDACTED] All other CPUC modifiable terms were identical to the contract templates.

7.1 Bid Selections Respond to Portfolio Needs

The solicitation was designed to effectively source a statewide third-party CWR program that will best meet the needs laid out in PG&E’s approved Business Plan and contribute to meeting WE&T overarching goals and metrics.

- RFA and RFP documents clearly communicated what was being sought in a statewide CWR program. Scoring rubrics developed for the RFA and RFP appropriately valued the most essential program attributes. Information requested from bidders was precisely aligned with the scoring criteria.
- The evaluation structure and process worked exactly as designed, and the three bids selected at the RFA stage and single bid selected at the RFP stage were those whose programs and proposals clearly were higher ranking and best aligned with the solicitation’s objectives.
- PG&E maintained full transparency at all times with the IE and PRG. PG&E invited input at every step of the process and consistently accepted recommendations and other feedback. Final selection of SEI’s Energize Careers program conforms to all PRG requirements regarding selection.

In the Final Contract scope of work, SEI summarizes the purpose and strategies of the Energize Careers program as follows, directly addressing all objectives of the solicitation:

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

7.2 Bid Selections Provide the Best Overall Value to Ratepayers

Because CWR is a non-resource program, quantitative assessments that would be performed to compare simple acquisition cost, program cost-effectiveness or amount of energy savings are not applicable for this solicitation. Great Work Energy’s assessment is that the SEI CWR bid provided the best overall value to ratepayers out of the field of bidders.

The budget and types of outcomes sought from a CWR program were well-defined in the RFP, and the task for bidders was to design a program and put together an implementation team that could effectively deliver the best and highest outcomes. The available budget for the statewide CWR program was set by PG&E at \$2 million/ program year for 3 years, plus costs for pre-launch activities, a one-year period of post-monitoring of participant employment, and ramp down costs. Four Quantifiable Outcomes were defined by PG&E in the RFP Data Form, where bidders were asked to estimate their program’s annual outcomes for each of the 3 program years.

- Disadvantaged workers participating in training
- Participants placed in jobs using EE skills
- Number of participants still in EE job after 1 year
- Partnerships established

[REDACTED]

GWE’s review and shadow-scoring of the proposals agreed with the PG&E scoring team’s assessment, and found the following about the SEI bid:

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Comparing the SEI proposal to the final contract that was negotiated, changes were minimal, and the positive characteristics of the bid were maintained and improved.

Table 7.2: Comparison of Proposal to Final Contract		
Budget	Proposal	Contract
Administration	[REDACTED]	[REDACTED]
Marketing	[REDACTED]	[REDACTED]
Direct Implementation - Non-Incentive	[REDACTED]	[REDACTED]
Total Program Budget	[REDACTED]	[REDACTED]
Quantifiable Outcomes	Proposal	Contract
[REDACTED]	[REDACTED]	[REDACTED]
Compensation %	Proposal	Contract
T&M	[REDACTED]	[REDACTED]
Deliverables	[REDACTED]	[REDACTED]
Milestones	[REDACTED]	[REDACTED]

[REDACTED]

7.3 Summary: Overall Assessment of Solicitation

As planned and executed, the solicitation process was in accordance with the CPUC-adopted IOU Solicitation Plan, including using a two-stage RFA/RFP process and allowing IE/PRG monitoring and feedback on all aspects of the solicitation.

As has been detailed throughout this report, PG&E was fair and consistent with all bidders in their administration of the statewide CWR solicitation. Great Work Energy saw no indication of conflict of interest or positive or negative bias from PG&E staff at any time in the process. PG&E consistently maintained strict communication protocols with bidders and did not stray from planned evaluation methodologies that had been presented to PRG.

The solicitation process resulted in the best bid being selected. Negotiations produced a fair contract that [REDACTED] supports program evaluability and retains all elements of SEI's compelling program design and strategy. IE monitoring of the entire solicitation process and review of the final contract did not find any outstanding issues and there appear to be no concerns that should be addressed prior to approving the contract.

Public Attachment B

Energy Efficiency Third-Party Solicitation Advice Letter

Program-Level Measurement & Verification Plan

Attachment B: Program-Level & Measurement & Verification Plan

There are no contracted programs calling for an exception to Normalized Metered Energy Consumption (NMEC) rules.

PACIFIC GAS AND ELECTRIC COMPANY

PART 2 CONFIDENTIAL VERSION

May 28, 2021

Appendix A

PG&E Statewide Workforce Education & Training Career and Workforce Readiness Program

Independent Evaluator Report

(Confidential)

May 28, 2021

Appendix B

PG&E Statewide Workforce Education & Training Career and Workforce Readiness Program

Solicitation Process Overview

(Confidential)

May 28, 2021

Appendix C

PG&E Statewide Workforce Education & Training Career and Workforce Readiness Program

Statewide 3P WE&T CWR Selection

(Confidential)

May 28, 2021

Appendix D

PG&E Statewide Workforce Education & Training Career and Workforce Readiness Program

Third-Party Contract Summary

(Confidential)

May 28, 2021

Appendix E

PG&E Statewide Workforce Education & Training Career and Workforce Readiness Program

Third-Party Contracts

(Confidential)

May 28, 2021

**PG&E Gas and Electric
Advice Submittal List
General Order 96-B, Section IV**

AT&T
Albion Power Company

Alta Power Group, LLC
Anderson & Poole

Atlas ReFuel
BART

Barkovich & Yap, Inc.
California Cotton Ginners & Growers Assn
California Energy Commission

California Hub for Energy Efficiency
Financing

California Alternative Energy and
Advanced Transportation Financing
Authority
California Public Utilities Commission
Calpine

Cameron-Daniel, P.C.
Casner, Steve
Cenergy Power
Center for Biological Diversity

Chevron Pipeline and Power
City of Palo Alto

City of San Jose
Clean Power Research
Coast Economic Consulting
Commercial Energy
Crossborder Energy
Crown Road Energy, LLC
Davis Wright Tremaine LLP
Day Carter Murphy

Dept of General Services
Don Pickett & Associates, Inc.
Douglass & Liddell

East Bay Community Energy Ellison
Schneider & Harris LLP Energy
Management Service
Engineers and Scientists of California

GenOn Energy, Inc.
Goodin, MacBride, Squeri, Schlotz &
Ritchie

Green Power Institute
Hanna & Morton
ICF

IGS Energy
International Power Technology
Intestate Gas Services, Inc.
Kelly Group
Ken Bohn Consulting
Keyes & Fox LLP
Leviton Manufacturing Co., Inc.

Los Angeles County Integrated
Waste Management Task Force
MRW & Associates
Manatt Phelps Phillips
Marin Energy Authority
McKenzie & Associates

Modesto Irrigation District
NLine Energy, Inc.
NRG Solar

Office of Ratepayer Advocates
OnGrid Solar
Pacific Gas and Electric Company
Peninsula Clean Energy

Pioneer Community Energy

Redwood Coast Energy Authority
Regulatory & Cogeneration Service, Inc.
SCD Energy Solutions
San Diego Gas & Electric Company

SPURR
San Francisco Water Power and Sewer
Sempra Utilities

Sierra Telephone Company, Inc.
Southern California Edison Company
Southern California Gas Company
Spark Energy
Sun Light & Power
Sunshine Design
Tecogen, Inc.
TerraVerde Renewable Partners
Tiger Natural Gas, Inc.

TransCanada
Utility Cost Management
Utility Power Solutions
Water and Energy Consulting Wellhead
Electric Company
Western Manufactured Housing
Communities Association (WMA)
Yep Energy