PUBLIC UTILITIES COMMISSION
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3298

May 20, 2022

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

Subject: Staff Disposition of Pacific Gas & Electric Company's (PG&E) Advice Letter (AL) 4555-G/6467-E Third-Party Statewide Codes and Standards Federal Appliance Advocacy Contract Change Order executed between Cohen Ventures, Inc. and PG&E

Dear Mr. Dietz,

The California Public Utilities Commission's (CPUC) Energy Division (ED) approves PG&E's AL 4555-G/6467-E with an effective date of May 19, 2022.

On April 19, 2022, Pursuant to Ordering Paragraph (OP) 2 of D.18-01-004, PG&E submitted AL 4555-G/6467-E, containing its Third-Party Statewide Codes and Standards Federal Appliance Advocacy Contract Amendments executed between Cohen Ventures and PG&E.

Protests

No protests to this AL were filed.

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 this batch of third-party contracts with the contract budgets and durations in the table below for Energy Division review.[1] The initial Statewide Codes and Standards Federal Appliance Advocacy contract value of $4.86 million did not meet the thresholds requiring a Tier 2 advice letter as established in D.18-01-004.

The contract amendment in this advice letter incorporates the CPUC third-party contract terms and extends the contract with Cohen Ventures and adds $2 million for federal appliance advocacy coverage to align with the increase of federal rulemakings. Due to the new total contract budget of $6.896 million exceeding the $5 million threshold, this contract amendment requires a Tier 2 advice letter.

Discussion

In operationalizing the review of third-party advice letter contract amendments, EE Staff focused its review on the reasonableness of the contract amendment, CPUC intent on how to use these funds, size of contract budget, forecasted savings, and the contract's contribution to the portfolio-level cost-effectiveness requirements. Approval of this advice letter is not evidence of CPUC approval of ongoing or 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.

[1] D.18-01-004, pg. 57

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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 CPUC approval if the contract meets the advice letter threshold. With the issuance of this disposition, the implementation plans for these amended programs are due to be updated and posted no later than July 18, 2022.

Please direct any questions regarding Energy Division's findings in this disposition to Jeorge Tagnipes (Jeorge.Tagnipes@cpuc.ca.gov).

Sincerely,

FOR

Pete Skala
Interim Deputy Executive Director for Energy and Climate Policy/
Interim Director, Energy Division

Cc: Service List R.13-11-005
Simon Baker, Energy Division
Jennifer Kalafut, Energy Division
Alison LaBonte, Energy Division
Justin Galle, Energy Division

Pacific Gas and Electric Company

Sidney Bob Dietz II
Director
Regulatory Relations

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P.O. Box 770000
San Francisco, CA 94177

Fax: 415-973-3582

April 19, 2022

Advice 4555-G/6467-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 Statewide Codes and Standards Federal Appliance Advocacy Contract Change Order executed between Cohen Ventures, Inc. 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") approval of the contract change order to Energy Efficiency ("EE") Statewide Codes and Standards Federal Appliance Advocacy contract executed between PG&E and Cohen Ventures, Inc. The initial contract is the result from PG&E's Statewide Codes and Standards Request for Proposal ("RFP") solicitation for statewide resource EE customer programs and contributed towards meeting PG&E's 25 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, 2019[1], 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.

The original Contract was executed between PG&E and Cohen Ventures, Inc. on January 29, 2020 and did not require a Tier 2 advice letter based on the contract value and duration. A contract change order to increase the contract value above $5 million was executed between PG&E and Cohen Ventures, Inc. on April 5, 2022 and requires a Tier 2 advice letter.

Compliance Requirements

Per D.18-01-004, the IOUs are required to file 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

Anyone wishing to protest this submittal may do so by letter sent electronically via E-mail, no later than May 9, 2022, which is 20 days after the date of this submittal. Protests must be submitted to:

CPUC Energy Division
ED Tariff Unit
E-mail: EDTariffUnit@cpuc.ca.gov

The protest shall also be electronically sent to PG&E via E-mail at the address shown below on the same date it is electronically delivered to the Commission:

Sidney Bob Dietz II
Director, Regulatory Relations
c/o Megan Lawson
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 and 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, May 19, 2022, 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 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 Bob Dietz II
Director, Regulatory Relations

Attachments

cc: R.13-11-005 Service List

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:
- [x] ELC
- [x] 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) #: 4555-G/6467-E

Tier Designation: 2

Subject of AL: Advice Letter Submittal of Pacific Gas and Electric Company's Third-Party Statewide Codes and Standards Federal Appliance Advocacy Contract Change Order executed between Cohen Ventures, Inc. and PG&E

Keywords (choose from CPUC listing): Compliance

AL Type: [ ] Monthly [ ] Quarterly [ ] Annual [x] 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? [x] Yes [ ] No

If yes, specification of confidential information: see confidential 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: Matt Braunwarth, MPBb@pge.com.

Resolution required? [ ] Yes [x] No

Requested effective date: 5/19/22

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 proposed[1]: N/A

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

[1]Discuss in AL if more space is needed.

Clear Form

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

California Public Utilities Commission Energy Division Tariff Unit Email: EDTariffUnit@cpuc.ca.gov	Contact Name: Sidney Bob Dietz II, c/o Megan Lawson Title: Director, Regulatory Relations Utility/Entity Name: Pacific Gas and Electric Company Telephone (xxx) xxx-xxxx: (415)973-2093 Facsimile (xxx) xxx-xxxx: Email: PGETariffs@pge.com
	Contact Name: Title: Utility/Entity Name: Telephone (xxx) xxx-xxxx: Facsimile (xxx) xxx-xxxx: Email:

CPUC
Energy Division Tariff Unit
505 Van Ness Avenue
San Francisco, CA 94102

Clear Form

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 4555-G/6467-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 4555-G/6467-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 April 19, 2022, at San Francisco, California.

_/s/_

Matthew Braunwarth

PACIFIC GAS AND ELECTRIC COMPANY'S (U 39 M) ADVICE LETTER 4555-G/6467-E
April 19, 2022

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 4484-G/6310-E			
Confidential Appendix A: **Independent Evaluator Report of: Barakat Consulting, Inc.**	Item VIII) A) Bid information and B) Specific quantitative analysis involved in scoring and evaluation of participating bids. Item VII) B) Contracts and power purchase agreements between utilities and non-affiliated third parties (non-RPS) Public Utilities Code section 454.5(g)	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 SW Codes and Standards solicitation fulfilled Commission requirements. The IE Report relies on confidential information for its analysis and findings, so to provide as much information as possible without divulging market sensitive information. 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. PG&E has redacted confidential bid information 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 compiled 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.	3 years from April 19, 2022
Confidential Appendix B: **Solicitation Evaluation Criteria Scorecard and Program Savings Summary**	VIII) A) Bid information and B) Specific quantitative analysis involved in scoring and evaluation of participating bids	Appendix B provides the RFP evaluation criteria with associated scorecard weightings for each criteria and sub-criteria for PG&E's 2019 SW Codes and Standards RFP.	Three years after CPUC approval

PACIFIC GAS AND ELECTRIC COMPANY'S (U 39 M) ADVICE LETTER 4555-G/6467-E
April 19, 2022

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: **SW State of California Solicitation 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 SW State Codes and Standards 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 4555-G/6467-E
April 19, 2022

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
		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. 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.	

PACIFIC GAS AND ELECTRIC COMPANY'S (U 39 M) ADVICE LETTER 4555-G/6467-E
April 19, 2022

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 Cohen Ventures, Inc. (dba. Energy Solutions) Contract Change Order for Statewide Codes and Standards Federal Appliance Standards Advocacy Contract for Third-Party Energy Efficiency Customer Programs

PART 1 PUBLIC VERSION

April 19, 2022

Together, Building a Better California

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ATTACHMENT A: Final IE Report (Public)
ATTACHMENT B: Program-Level Measurement & Verification Plan

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 contract change order to EE Statewide Codes and Standards Federal Appliance Standards Advocacy contract between Cohen Ventures, Inc. dba Energy Solutions (Cohen) and PG&E. The initial contract is a result of PG&E's solicitation for Statewide Codes and Standards (SW C&S) EE customer programs.

As the designated lead Program Administrator (PA) for the Statewide Codes and Standards Program, PG&E is submitting this Advice Letter for the SW C&S Federal Appliance Standards Advocacy contract change order. This program is implemented on behalf of California's four Investor-Owned Utilities (IOUs) - PG&E, Southern California Edison (SCE), Southern California Gas Company (SCG or SoCalGas), and San Diego Gas & Electric Company (SDG&E).

Cohen's program, named Federal Codes and Standards Support (the Program), provides technical support for federal-level appliance energy conservation standards related to white goods, low power mode and miscellaneous products for all four California IOUs.

PG&E recognizes the importance of codes and standards in the pursuit of multiple energy efficiency and decarbonization policy objectives. While the core aim of the codes and standards program is to strengthen or develop regulations to promote and support energy efficiency, the program continues to also support regulations that promote a number of other important state policy objectives (e.g. water efficiency, electrification, greenhouse gas reduction, alternative fuel vehicles, grid flexibility and sustainability, indoor air quality, and equity considerations) as they relate to EE.

The original C&S Federal Appliance Standards Advocacy contract between PG&E and Cohen was fully executed on January 29, 2020, and contributed to the 25 percent outsourcing compliance target. The original contract value of $4.896M through December 31, 2022, did not meet the thresholds requiring CPUC approval via Tier 2 advice letter.[1] The contract change order between PG&E and Cohen adding $2M for a total contract value of $6.896M was fully executed on April 5, 2022, this revised contract value requires CPUC approval via Tier 2 advice letter. The subject of this advice letter is the Cohen's Statewide

[1] D. 18-01-004, p. 61, OP 2.

C&S Federal Appliance Standards Advocacy contract change order to expand statewide federal appliance standards advocacy coverage to align with the increase of federal rulemakings.

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"[2] and further defined the term "statewide".[3] Additionally, in D.16-08-019, the Commission identified a list of programs to be administered statewide, including codes and standards programs, and laid out the basic structure of the requirements for statewide programs going forward.[4]

Pursuant to the Commission's April 14, 2017, Scoping Memo and Ruling,[5] 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.[6] On January 11, 2018, the Commission issued D.18-01-004 (Decision Addressing 3P[7] 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, assigned lead PAs, and identified areas of sole responsibility for the lead PA including the responsibility of procurement and contract administration. D.18-05-041 also extended the 25 percent third-party portfolio outsourcing deadline to December 19, 2019.

On August 15, 2019, the Commission issued D.19-08-034 (Decision Adopting Energy Efficiency Goals for 2020 – 2030). D.19-08-034 identified potential achievable cost-effective electricity and natural gas efficiency savings, "established efficiency targets" for IOUs to achieve, and significantly reduced the savings and budget targets from the levels identified in previous years.

In accordance with D.18-01-004,[8] 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.18-01-004[9] and in

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[2] D.16-08-019, p. 111, Ordering Paragraph (OP) 10.
[3] D.16-08-019, p. 109, OP 5.
[4] D.16-08-019, pgs. 62-64
[5] 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
[6] 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
[7] Third-Party.
[8] D. 18-01-004, pgs. 61-62, OP 3-4.
[9] D. 18-01-004, pgs. 62-63, OP 5.

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.[10] PG&E launched the SW C&S Program Request for Proposals (RFP), which included three subprograms (Federal Appliance Standards Advocacy, State Appliance Standards Advocacy, and C&S Program Coordinator), in September 2019 and resulted in 5 contracts being awarded. Throughout the solicitation process, PG&E worked closely with its PRG and its IE to confirm fairness, transparency, and compliance with all Commission directives and program rules.

II. The Solicitation was Conducted in Conformance with State's Energy Policy Goals

PG&E's strategy for the SW C&S solicitation was to use advocacy for federal appliance standards and advocacy for state appliance standards to maximize energy savings in California. The C&S Program saves energy on behalf of ratepayers by directly influencing standards and code-setting agencies to strengthen EE regulations and appliance standards. California has ambitious state policy goals that include doubling cost-effective EE savings in electricity and natural gas end uses by 2030 (SB 350)[11], Zero Net Energy (ZNE) for new and existing buildings, as well as longer-term greenhouse gas (GHG) objectives (SB 32)[12]. To achieve these goals, California must increase energy savings and change the way it uses resources. Past C&S efforts have delivered substantial, cost-effective savings, and PAs will continue to pursue C&S EE efforts and advocacy for appliance standards to maximize energy savings.

Federal Appliance Standards Advocacy Program Goals:

This subprogram's main goal and objective is to advocate for higher efficiency Federal Appliance Standards and more representative appliance test procedures. The advocacy influences appliance standards and provides significant, cost-effective energy savings.

Federal Appliance Standards Advocacy Program Design:

This subprogram is designed to advocate for higher appliance standards and more representative test procedures at the US Department of Energy, US Environmental Protection Agency Energy Star Program, American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) and the International Energy Conservation Code (IECC). Successful advocacy includes conducting primary data collection (field studies, lab studies, customer surveys, etc.), participating in public and private negotiations on test procedures or standards, submitting comment letters or Codes & Standards Enhancement Studies (CASE Studies), identifying supportive stakeholders and building coalitions to

[10] Edward Randolph Letter to Erik B. Jacobson regarding "Approval of Energy Efficiency Independent Evaluators." August 31, 2018.
[11] Clean Energy and Pollution Reduction Act of 2015 Approved by Governor 11/07/2015.
[12] California Global Warming Solution Act of 2006 Approved by Governor 10/08/2006.

support higher standards, providing legal support to the California Energy Commission to support adopted standards and other means as identified by the program implementors. Each rulemaking will use at least one type of advocacy and more significant efforts will be used on rulemakings that have the potential to provide significant energy savings to the program.

Table A below lists five contract awards resulting from PG&E's SW C&S solicitation. Per D.18-01-004, contracts with terms longer than 36 months and/or values above $5 million require CPUC approval via Tier 2 advice letter.[13] While none of these contracts met the $5M advice letter trigger, four of them were just below that amount. In the interest of transparency, PG&E consulted with Commission staff who confirmed that PG&E was not required to file an advice letter seeking CPUC approval for any of these contracts.[14]

Table A: Contract Resulting From PG&E's SW C&S Solicitation			
		Budget ($M)	**Duration** (months)
1.1	2050 Partners Statewide Federal Appliance Standards Advocacy	$4.899M	35
1.2	2050 Partners Statewide State Appliance Standards Advocacy	$4.900M	35
1.3	Cohen Ventures Statewide Federal Appliance Standards Advocacy	$4.896M	36
1.4	Cohen Ventures Statewide State Appliance Standards Advocacy	$4.946M	35
1.5	Cohen Ventures Codes and Standards Program Coordinator	$.960M	34

Contract Change Order:

A contract change order adding budget of $2M to the C&S Federal Standards Advocacy contract between PG&E and Cohen for a total contract value of $6.896M was fully executed on April 5, 2022. This revised contract value requires CPUC approval via Tier 2 advice letter. This contract change order makes no change to the original contact duration of 35 months.

The increased funding with this contract change order is necessary for the program to respond to an increased number of federal rulemakings being driven by the new presidential administration. Table A-1 includes the program budget increase from this contract change order. PG&E will reallocate funds from the C&S State Appliance Standards Advocacy Subprogram to cover the increase in budget to the C&S Federal Appliance Standards Advocacy Subprogram so that the total statewide budget for both efforts remains the same. The other IOUs have agreed on this budget approach. The current fund shift will not reduce the Codes & Standards Advocacy subprograms ability to meet the needs of the CEC's water and energy efficiency and flexible demand appliance standards. This will not change

[13] D. 18-01-004, p. 61, OP 2.
[14] Email from Cheryl Wynn January, 21, 2020

priorities or reduce efforts at the state level.

Table A-1 includes the program budget increase from this contract change order. PG&E will reallocate funds from the C&S State Appliance Standards Advocacy Subprogram to cover the increase in budget to the C&S Federal Appliance Standards Advocacy Subprogram so that the total statewide budget for both efforts remains the same. The other IOUs have agreed on this budget approach.

Table A-1: Cohen Total Contract Budget Resulting From Contract Change Order			
		Budget ($M)	**Duration** (months)
1.1	Cohen Ventures Statewide Federal Appliance Standards Advocacy	$6.896M	35 (same as original contract)

The following Table B2.1 provides a detailed contract summary of Cohen's C&S Federal Appliance Advocacy contract and includes the contract change order program budget increase. PG&E has included the contract sensitive information as part of the Confidential Section D.

Table B2.1: General Contract Summary – Cohen Statewide Codes & Standards Federal Appliance Standards Advocacy		
1	Solicitation name	Third-Party Codes and Standards Energy Efficiency Program
2	Type of program: local, regional or statewide	Statewide
3	Delivery Type – specify the delivery type (i.e., direct install, upstream, midstream, or downstream)	
	A. Direct Install/Downstream Customer Targeting (Yes or No)	N/A
	B. Customer Targeting brief description, if applicable	N/A
	C. Midstream/Upstream Market Actors receiving incentives (i.e., manufacturers, distributors, contractors, or other (specify).	N/A
4	Market/Sector(s)	N/A
5	Customer Segment(s)	N/A
6	Third-Party Implementer/Subcontractor name	Cohen Ventures, Inc.
7	Name of program or service	Federal Codes and Standards Support
8	Brief description of program or service (2-3 sentences)	This program provides technical support related to federal-level

Table B2.1: General Contract Summary – Cohen Statewide Codes & Standards Federal Appliance Standards Advocacy		
		appliance energy conservations standards, voluntary programs and test procedure development. These efforts include standard proceedings conducted by the United States Department of Energy ("DOE"), DOE-brokered and DOE-independent negotiation efforts between industry and energy efficiency advocate organizations and utility organizations, ENERGY STAR specification development efforts conducted by the Environmental Protection Agency ("EPA"), American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) and other strategic efficiency codes & standards policy.
9	Total kWh Energy Savings (First year, net) for each year contract in effect	N/A
10	Total MW Energy Savings (First year, net) for each year contract in effect	N/A
11	Total therms Energy Savings (First year, net) for each year contract in effect	N/A
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	N/A
13	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	N/A
14	Forecasted Number of Customers Served by Program Year	N/A
15	Area(s) Served (including service territory, climate zones, cities, and/or counties, as applicable)	PG&E, SCE, SoCalGas, and SDG&E territories
16	Program TRC ratio (PG&E's SUMMARY CET output; Tab C1 of Attachment 2 Exhibit A)	N/A
17	Program PAC ratio (PG&E's SUMMARY CET output; Tab C1 of Attachment 2 Exhibit A)	N/A

Table B2.1: General Contract Summary – Cohen Statewide Codes & Standards Federal Appliance Standards Advocacy		
18	Program $/kWh (TRC levelized cost, CET output)	N/A
19	Program $/kWh (PAC levelized cost, CET output)	N/A
20	Program $/therm (TRC levelized cost, CET output)	N/A
21	Program $/therm (PAC levelized cost, CET output)	N/A
22	Budget: Forecast budget by program year (PY) for each year contract in effect	2020: $1,632,000 2021: $1,632,000 2022: $1,632,000
23	Budget: Forecast expenditures by program year (PY) for each year contract in effect	2020: $ 1,729,286 2021: $ 2,261,888 2022: $2,904,825
24	Budget: Total Program Budget	$6.896M
25	Budget: If EE/DR component to the program, provide dollar amount and percent of total budget dedicated to EE/DR component	N/A
26	Measure(s)	N/A
27	Savings Determination Type (i.e. custom, deemed, Net Metered Energy Consumption, or Randomized Control Trial)	N/A
28	Savings Calculation Method(s) (Meter-Based, Deemed, Calculated, Multiple and/or Other) If Multiple or Other, please specify	N/A
29	Contract start date and end date	01/29/2020 – 12/31/2022
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.	01/29/2020 – 12/31/2022

B. Solicitation Process Overview

I. Solicitation Strategy & Design

D.18-01-004,[15] provides flexibility to bypass the RFA process and narrowly limits the utilization of a single-stage process to schedule related reasons. PG&E designed the C&S solicitation as a single-stage RFP based on the short timeline required to have contracts in place by January 2020 to align with the CEC's new appliance standards rulemakings[16]. As lead PA, PG&E was looking for C&S programs that could achieve immediate and long-term, persistent, and comprehensive energy savings via appliance standards.

PG&E consulted the non-lead IOU PAs when developing the scope and requirements for the SW C&S RFP. The non-lead IOU PAs were not involved in the evaluation of any 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 submissions.

Bidders shortlisted in the RFP were invited to participate in competitive contract negotiations to determine final contract awards. The use of competitive negotiations was borrowed as a best practice from PG&E's Energy Supply all-source procurements where assembling a portfolio solution from dissimilar project technologies with high levels of complexity is common.

Barakat Consulting was assigned as the Independent Evaluator (IE) to observe the solicitation. 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. The IE is listed below in *Figure 1 – PG&E EE Independent Evaluator Pool* along with their assigned area of responsibility in this solicitation.

FIGURE 1 – PG&E EE Independent Evaluator		
Customer Sector	**Organization / Company**	**Independent Evaluator**
Codes and Standards	Barakat Consulting	Elizabeth Lowe

II. Solicitation Stage 1: Detailed RFA Overview

Not applicable as this was a single stage solicitation.

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

[15] D.18-01-004, p. 57, Conclusion of Law (COL) 5.
[16] The 2019 Title 24, Part 6 and Part 11 Standards were formally adopted by the Building Standards Commission in a formal hearing on December 5, 2018. The standards went into effect on January 1, 2020.

describes in detail the execution of PG&E's SW C&S RFP process. A detailed RFP solicitation timeline can be found in *Figure 5 – RFP Solicitation Process Events*.

RFP Scope & Structure:

Due to California's ambitious energy policy goals, the RFP scope focused bidders to propose programs that provide advocacy support, develop Codes and Standards Enhancement (CASE) studies/comment letters, and provide assistance to influence appliance standards and test procedures at the state and national levels.

RFP Eligibility: The RFP was open to innovative program designs which addressed at least one of the following program requirements;

- C&S Federal Appliance Standards Advocacy Consultant (Federal Consultant) to assist the CEC, DOE, Energy Star, and Federal Trade Commission (FTC) Notice and Comment Rulemakings, and DOE Appliance Standards Rulemaking Federal Advisory Committee (ASRAC) negotiations; or

- C&S State Appliance Standards Advocacy Consultant (State Consultant) to provide responses, further advocacy efforts that will maximize energy savings and still be cost-effective, technically feasible and available in the appliance market; or.

- C&S Program Coordinator (Program Coordinator) to connect, assemble and lead the coordination of the various C&S project teams (Project Teams) in advocacy efforts for appliances.

Additional eligibility requirements included disclosing any potential conflict of interest as an IOU affiliate or any involvement as a CA EM&V program evaluator, or public-affiliation or ownership (in whole or part) of a company that manufacturers covered equipment or an industry group with public support for positions not in the California ratepayers' interests, or public positions (which could include but are not limited to position papers, information on company websites, comments on specific rulemakings or conference presentations) that go against ratepayer interests.

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, team resumes, a transmittal letter, an Experience Modification Rate (EMR) Letter, a Supply Chain Responsibility Exhibit, and lastly the direct entry of Supply Chain Responsibility information into the PowerAdvocate platform.

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

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 Program Design and Logic Model, Desired Outcomes, Program Innovation, Program Management, Risk Management, Team Composition and Roles, Codes and Standards Experience, and Diverse Business Enterprise. *Figure 2 – PG&E SW C&S RFP Evaluation Criteria* lists the various sub-criteria used to evaluate each proposal submission.

FIGURE 2 – PG&E SW C&S RFP Evaluation Criteria	
RFP Scoring Criteria	**Sub-Criteria**
Program Design	Program Design Program Innovation
Program Feasibility	Program Management Compensation & Performance
Company Qualifications	Team Composition and Roles Codes and Standards Experience
Supply Chain Responsibility	Diverse Business Enterprise

RFP Final Document Review: In the months leading up to RFP launch, PG&E presented the SW C&S RFP structure, refined program function detail, and RFP scoring methodology to IOUs, IE, and the PRG for early feedback. During the process, PG&E collected 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.

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 final review prior to the issuance of the RFP.

RFP Launch: PG&E issued the SW C&S RFP solicitation on September 10, 2019. PG&E uploaded all RFP solicitation documents to PG&E 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.

RFP Bidders Conference: The RFP Bidders' Conference was held on September 16, 2019, via webinar. The IE reviewed the presentation materials prior to the conference and monitored the discussion during the event for accuracy and fairness.

RFP Evaluation Team Training: The PG&E RFP evaluation team consisted of evaluators focused on the areas of codes and standards, program management, engineering and policy. Prior to receiving proposals for evaluation, PG&E conducted a training session with the evaluation team and the IE to provide an overview of the evaluation process, orientation

to the scorecard, and guidance on how to apply the scoring criteria consistently and fairly.

RFP Submission and Validation: PG&E received five proposals from two 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. A breakdown of the proposals received can be found below in *Figure 3 – Breakdown of Proposals Received*.

FIGURE 3 – Breakdown of Proposals Received		
Proposals Received	**Non-Conforming**	**Proposals Evaluated**
5 2 proposals: Federal Standards Advocacy 2 proposals: State Standards Advocacy 1 proposal: C&S Program Coordinator	0	5

RFP Evaluation: Individual scoring of proposals started in October 2019. Each proposal was reviewed against the evaluation criteria and sub-criteria listed in *Figure 2 – PG&E SW C&S 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: PG&E conducted calibration discussions across all scoring criteria and finalized proposal scores. 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 were limited to proposals with sub criteria scores (including IE scores) with a range between the maximum and minimum score of greater than 2. The calibration discussions did not substantively change the outcome.

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 the IE's scores.

RFP Shortlist: On November 21, 2019, PG&E presented the RFP shortlist to the PRG and discussed the proposed shortlisting approach. PG&E's approach was straightforward, with the top two Bidders advancing to negotiations.

A breakdown of the shortlisted proposals by can be found below in *Figure 4 – PG&E SW*

C&S RFP Shortlist. PG&E did not dismiss any proposals from the RFP.

FIGURE 4 – PG&E SW C&S RFP Shortlist			
Proposals Received	**Non-Conforming**	**Proposals Evaluated**	**Advance to Negotiations**
5 2 proposals: Federal Standards Advocacy 2 proposals: State Standards Advocacy 1 proposal: C&S Program Coordinator	0	5	5

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 was reviewed by the IE and presented to the PRG in the December 2019 monthly meeting. In contract negotiations, PG&E and bidders engaged in detailed discussions of pricing & compensation, key performance indicators (KPIs), program scope and budget, and other proposed changes to modifiable contract terms.

Final contract awards 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 design, KPIs, historical Bidder team experience, and overall risk mitigation approaches when making final contract award determinations.

As SW C&S negotiations were concluded, PG&E came to agreement on terms with Cohen for a C&S Federal Standards Advocacy contract. This contract was allocated to PG&E's 25 percent outsourcing compliance requirement ahead of the June 30, 2020, deadline.[17]

V. Solicitation Timelines

The following figure depicts the planned timeline of solicitation events for PG&E's SW C&S RFP timeline with notes.

FIGURE 5 – RFA and RFP Solicitation Process Events		
Event	**Actual Date**	**Notes**
RFA Material Development Developed solicitation materials, evaluation criteria and definitions, and reviewed by IE and PRG members.	N/A	
RFA Issued	N/A	

[17] D.18-01-004 p. 61 OP. 1a

FIGURE 5 – RFA and RFP Solicitation Process Events		
Event	**Actual Date**	**Notes**
RFA documents were available to bidders on PG&E's EE Solicitation Website as well as PowerAdvocate for download.		
RFA Pre-Bid Conference Conference made available via webinar to all interested participants. Registration was not required to attend this event.	N/A	
RFA Q&A Deadline Deadline to submit written questions to PG&E in PowerAdvocate.	N/A	
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.	N/A	
Abstract Submission Deadline Abstract submission due date. Registration in PowerAdvocate was required to submit an Abstract to PG&E.	N/A	
RFA Evaluation and Scoring Scoring and Calibration	N/A	
RFA Shortlist Finalized	N/A	
RFA Shortlist Presented to PRG	N/A	
RFA Shortlist Notification Bidders were notified whether their Abstract(s) were shortlisted through PowerAdvocate.	N/A	
RFP Material Development Developed solicitation materials, scoring rubric, scoring elements and criteria and presented to and reviewed by IE and PRG members.	June – August 2019	
RFP Issued RFP documents were available to bidders in PowerAdvocate for download.	September 10, 2019	Potential bidders were notified that the RFP was launched.

FIGURE 5 – RFA and RFP Solicitation Process Events		
Event	**Actual Date**	**Notes**
RFP Pre-Bid Conference Pre-Bid Conference event registration and webinar access instructions available in PowerAdvocate.	September 16, 2019	Attendees participated via WebEx and included utility and Commission personnel.
RFP Q&A Deadline Written questions regarding the RFP were due to PG&E in PowerAdvocate.	September 18, 2019	PG&E received two questions in total.
PG&E Q&A Response Deadline Bidders had access to review PG&E's responses to all written questions submitted in the RFP.	September 23, 2019	PG&E uploaded the responses to two questions to PowerAdvocate.
Proposal Submission Deadline Bidders Proposals submission due date. Registration in PowerAdvocate was required to submit a Proposal.	October 8, 2019	
RFP Evaluation and Scoring Scoring and Calibration	October 14 – 18, 2019	PG&E screened and scored 5 Proposals.
RFP Shortlist Presented to PRG	November 21, 2019	5 Proposals advanced to negotiations.
Contract Negotiations	December 2019 – January 2020	
Contract presented to PRG	January 28, 2020	
Execute Agreements Parties negotiations and successful agreement with counterparties reflected in executed Agreements	January 29, 2020	PG&E executed five Appliance Standards Advocacy to two vendors resulting from the SW C&S RFP (see Table A).
Execute Contract Change Order Successful agreement changes with counterparties reflected in executed Contract Change Order	April 5, 2022	PG&E increased the Federal Appliance Standards Advocacy budget for Cohen
Advice Letter PG&E filed Advice Letters	April 19, 2022	The original contract executed 01/29/2020 did not require an Advice Letter.

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
- CPUC service lists (R. 13-11-005, A. 17-01-013, A.17-01-012)

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 California legislation, PG&E's EE Portfolio, PG&E's solicitation strategy, and PG&E's Energy Savings Platform Rulebook.

VIII. Communications with Bidders

Whenever possible, 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 shortlist notification. 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 RFP Q&A period.

IX. Independent Evaluators

PG&E engaged one IE from the Commission's approved list of IEs for this SW C&S

RFA/RFP process.

PG&E engaged the IE throughout the solicitation process. IE feedback was openly received, considered, and discussed. The principal areas of engagement with the 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;
- Reporting to the PRG and participation in monthly PRG meetings.

The final IE Contract Report[18] 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

Not applicable, as this was a single stage solicitation.

(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; 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.

(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 confirm discussions were conducted fairly.

2. Transition Plan from Existing to New Program

PG&E summarizes the transition from similar existing programs serving the SW C&S Federal Standards Advocacy subprogram to the new third party implemented program in *Figure 6 – Transition Plan* below. If the existing program is being fully replaced, the table defines the replacement programs; both new third-party implemented programs and existing

[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.

programs. Existing programs that will not transition to the new third-party implemented program have been identified as "Not Replaced" in the table below.

Figure 6: Transition Plan from existing IOU programs to the new statewide third-party implemented program.

Transition Plan to New 3P SW C&S Federal Program	EXISTING CUSTOMER PROGRAMS			
	PrgID	Program Name	Program Common Name	Subsector
In 2020 all of the IOUs closed their C&S Advocacy efforts and began funding the SW C&S Appliance Standards Advocacy Implementors.	PGE21057	Codes & Standards Federal Appliance Standards Advocacy Subprogram	Codes & Standards Federal Appliance Standards Advocacy Subprogram	Cross-cutting

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 SW C&S 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 the 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, Appendix C, 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: SW C&S 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 Third-Party Solicitation Advice Letter

Final IE Report
(Public)

Final Report

Pacific Gas and Electric Company
Statewide Codes and Standards Solicitation

Prepared by:

Barakat Consulting, Inc.
Assigned Independent Evaluator

Barakat Consulting
INCORPORATED

June 22, 2020

Pacific Gas and Electric Company

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Statewide Codes and Standards Solicitation Final Report Table of Contents

Executive Summary

The purpose of the Statewide Codes & Standards (C&S) program solicitation was to select third-party program implementer bidders to design and deliver the Statewide C&S Program that:

- Provides C&S Appliance Standard advocacy,
- Conduct necessary data collection to inform C&S Enhancement (CASE) studies,
- Develops CASE studies, and
- Provides assistance and guidance in preparing comment letters to influence appliance standards and test procedures at the state and national levels (e.g., the California Energy Commission's (CEC) Order Instituting Rulemaking for Title 20 Appliance Standards and the US Department of Energy's (DOE) ongoing rulemaking for Federal Appliance Standards).

As the lead Investor Owned Utility (IOU) for this solicitation, Pacific Gas & Electric (PG&E) developed the solicitation with input from Southern California Edison Company (SCE), San Diego Gas and Electric Company (SDG&E), and Southern California Gas Company (SoCalGas) and feedback from the Independent Evaluator (IE) and the Procurement Review Group (PRG).

The scope of solicitation included three roles as shown in Table ES-1, below:

Table ES-1: RFP Defined Three C&S Consulting Opportunities	
Program Coordinator	Overarching consultant (1) who manages the deadlines, maintains subprogram deliverables, ensures consistent tone and supports IOU staff positions and questions.
Federal Advocacy Subprogram Support	Consultants to conduct research, analysis, write comment letters and coordinate with other stakeholders in the federal appliance standards work.
State Advocacy Subprogram Support	Consultants to conduct research, analysis, write CASE Studies) and coordinate with other stakeholders as appropriate in the CEC Title 20 process.

The timing of the solicitation was moved up based on the need to have contracts in place in January 2020 to support the CEC's code cycle updates.[1] Due to the time

[1] The 2019 Title 24, Part 6 and Part 11 Standards were formally adopted by the Building Standards Commission in a formal hearing on December 5, 2018. The standards went into effect on January 1, 2020.

constraints, it was not practical to go through a two-stage solicitation process, so there was only one stage (Request for Proposal {RFP}) solicitation.[2] Table ES-2 shows the key milestones for the solicitation and final contracting.

Table ES-2: Key Milestones	
Milestones	**Completion Date**
RFP Release	September 9, 2019
Proposals Submitted	October 7, 2019
Scoring and Calibration	October 10 – October 29, 2019
Shortlisting	November 26, 2019
Contract Negotiations	January 2020
Contracts in Place	Jan- Mar 2020

PG&E received five proposals from two bidders: Energy Solutions (for Coordinator, State and Federal support roles) and 2050 Partners (for State and Federal support roles). The IOU's bid ranking and selection process was applied fairly and consistently in the RFP selections. PG&E decided to award each of the bidders the work as bid for the State and Federal code advocacy efforts and awarded Energy Solutions the Coordinator role. There has been an allocation of work between the two implementers, with the work ultimately managed by the PG&E Program Manager.

Final contract amounts are shown in Table ES-3 and reflect caps on each of the three year contracts through December 31, 2022.

Table ES-3: Final Contract Awards			
Role	**Company**	**Contract NTE**	**Date Executed**
Coordinator	Energy Solutions	$960,000	March 12, 2020
Title 20 Consultant	Energy Solutions	$4,896,820	February 4, 2020
Federal Consultant	Energy Solutions	$4,896,820	January 29, 2020
Title 20 Consultant	2050 Partners	$4,900,077	February 11, 2020
Federal Consultant	2050 Partners	$4,899,619	February 11, 2020

Throughout the solicitation process, PG&E followed the appropriate bidding process, considered PRG guidelines and input of the PRG and the IE to come to its final

[2] D.18-01-004, COL 5, states: "All utilities should utilize a two-stage solicitation process for third party programs unless there is a specific schedule-related reason only one stage is possible."

selection**.** The process was fair and transparent**.** The only issue identified by the IE in the process was the low number of bidders**.** The expectation was that there would be at least four different companies bidding, which would have made for a larger pool from which to choose and /or contract. We recommend that PG&E expand outreach in future C&S solicitations in order to encourage additional bidders to submit proposals because a larger pool of implementors may result in a more robust program overall.

1. Background

The Final Solicitation Report (Report) provides an assessment of the PG&E's (or the Company) third-party energy efficiency (EE) program solicitation process and progress by PG&E's assigned IE. The Report is intended to provide feedback to PG&E and other stakeholders on the Company's energy efficiency program solicitations in compliance with the California Public Utilities Commission (CPUC) direction.[3] In addition to a semi-annual report provided by each IE on each solicitation to which they are assigned, each IE must submit a final IE Report documenting the entire solicitation process and observations made throughout. This report meets that requirement.

Regulatory Context

In August 2016, the CPUC adopted Decision 16-08-019, which defined a "third-party program" as a program proposed, designed, implemented, and delivered by nonutility personnel under contract to a utility program administrator. In January 2018, the CPUC adopted Decision 18-01-004 directing the four IOUs—PG&E, SCE, SDG&E, and 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.18-01004 are required to be applied to the business plans of the investorowned 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 19, 2019.*

Two Stage Solicitation Approach

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 "unless there is a specific schedule-related reason only

[3] Decision 18-01-004, OPN 5.c.

one stage is possible"[4]. All IOUs are required to conduct a Request for Abstract (RFA) solicitation, followed by a full RFP stage.[5]

The CPUC also 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 solicitation-related discussions and are bound by confidentiality obligations.

Extension Request

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, 2020[5].

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.

[4] D.18-01-004, COL 5 [5]
Decision 18-01-004, p. 31.
[5] CPUC Letter to IOUs regarding the "Request for Extension of Time to Comply with Ordering Paragraph 4 of Decision 18-05-041", November 25, 2019.

2. Solicitation Overview

2.1 Overview

The Statewide C&S Program, funded by the California's IOUs including PG&E, SDG&E, SoCalGas, and SCE, saves energy on behalf of IOU ratepayers by directly influencing standards and code-setting bodies to strengthen energy efficiency regulations. California has ambitious state policy goals that include doubling cost effective energy efficiency (EE) savings in electricity and natural gas end uses by 2030 (Senate Bill 350), Zero Net Energy (ZNE) for new and existing buildings, as well as longer-term greenhouse gas (GHG) objectives (Senate Bill 32). To achieve these goals, the state of California must increase energy savings and change the way it uses resources. Past Statewide C&S program efforts have delivered substantial cost-effective energy savings and program administrators envision continuing and refining these activities to maximize energy savings. For example, for 2020 alone, PG&E anticipates Codes & Standards to deliver over 65% of the total energy savings to the PG&E EE portfolio as shown in Figure 1 from the PG&E 2020 Annual Budget Advice Letter filing.[6]

Figure 1: PG&E 2020 Forecast Budget and Savings Summary

Table 1: PG&E 2020 Forecast Budget and Savings Summary

Sector	Program Year (PY) Budget	PY FORECAST ENERGY SAVINGS (Net) kWh	kW	MMtherms
Residential	$61,724,853	187,751,466	36,852	6.4
Commercial	$43,385,765	40,798,518	6,151	3.1
Industrial	$28,440,001	34,823,014	4,583	2.4
Agriculture	$14,257,005	16,143,937	4,792	0.7
Emerging Tech	$5,060,002	0	0	0
Public[6]	$25,323,576	18,939,477	3,420	0.2
WE&T	$8,600,052	0	0	0
Finance	$5,779,661	40,957,381	10,148	1.8
OBF Loan Pool	$13,500,000	0	0	0
PG&E Subtotal	$206,070,915	339,413,791	65,947	14.6
CPUC Program Savings Goal		309,000,000	64,000	12.0
Forecast savings as % of CPUC Program Savings Goal		110%	103%	121%
Codes and Standards	$21,953,881	650,815,127	132,340	17.9

There are three advocacy subprograms that have been conducted by contractors on a time and materials basis under the direction of the Program Manager:

1) Title 24 building codes advocacy,

2) Title 20 state appliance standards advocacy, and

3) Federal codes and standards.

[6] Advice 4136-G/5627-E, PG&E's 2020 Energy Efficiency Annual Budget Advice Letter in Compliance with Decisions 15-10-028 and 18-05-041

The Title 24 building code contracts were bid out in November 2018 to meet the CEC's Title 24 schedule that began in January 2019. In 2018 PG&E signed Title 24 Contracts with Cohen Ventures Inc (Energy Solutions), Evergreen Economics Inc, Franklin Energy, Frontier Energy Inc, McHugh Energy Consultants Inc, TRC Solutions Inc., and University of California (UC) Davis.

The Title 20 state appliance standards advocacy and Federal codes and standards advocacy were bid out at the same time in 2019 as a part of the new solicitation process.

Solicitation Scope

The purpose of the Statewide C&S program solicitation was to select third-party program implementer bidders to design and deliver the Statewide C&S Program that:

- Provides C&S Appliance Standard advocacy,
- Conduct necessary data collection to inform C&S Enhancement (CASE) studies,
- Develops CASE studies, and
- Provides assistance and guidance in preparing comment letters to influence appliance standards and test procedures at the state and national levels (e.g., the CEC Order Instituting Rulemaking for Title 20 Appliance Standards and the DOE's ongoing rulemaking for Federal Appliance Standards).

The scope of solicitation included three roles: 1) a Project C&S Coordinator, 2) a Federal C&S Appliance Consultant, and 3) a State C&S Appliance Consultant. The desired outcomes included the following:

1) Pool of qualified implementers for the State and Federal Appliance Standards Advocacy subprograms that can successfully advocate for the CA ratepayer interests
2) Skillful coordinator who can maintain a database of deliverables and support coordination between the advocacy implementers
3) Solicitation completed in sufficient time to begin work on the upcoming CEC Order Instituting Rulemaking (OIR), released in fall of 2019

Budgets for the various consulting opportunities as defined in the RFP were very broad as shown in Table 1 below:

Table 1: Solicitation Budgets	
Range	**Contracting Target (3-Year Total)**
High End of Range	$15 million
Low End of Range	$0.5 million

Solicitation Objectives

The C&S Appliance Standard Advocacy activities influence appliance standards and test procedures at the state and national levels. The advocacy process is complex and will require careful planning and project management. Consistent with the current approach to the C&S efforts, the three contracting opportunities available for bidders through the combined C&S solicitation would be conducted by selected consultants on a time and materials basis.

Descriptions of the three roles requested in the RFP are discussed in more detail in Table 2 and descriptions on the following page.

Table 2: RFP Roles	
Program Coordinator	Overarching consultant (1) who manages the deadlines, maintains subprogram deliverables, ensures consistent tone and supports IOU staff positions and questions.
Federal Advocacy Subprogram Support	Consultants to conduct research, analysis, write comment letters and coordinate with other stakeholders in the federal appliance standards work.
State Advocacy Subprogram Support	Consultants to conduct research, analysis, write CASE studies and coordinate with other stakeholders as appropriate in the CEC Title 20 process.

Project Coordinator Role

The role of the Project Coordinator is to connect, assemble and lead the coordination of the various C&S project teams (Project Teams) in advocacy efforts for appliances. Project Teams include subject matter experts that are adept in understanding specific appliance categories for both residential and non-residential areas. The Program Coordinator may need to assemble and outsource to additional experts in niche areas in order to acquire additional expertise in areas such as, lighting and controls, HVAC, white goods or high-tech products to fulfil the work scope of a Project Team. The Program Coordinator will also assist PG&E (who retains the role of Program Manager in this program) in supporting and developing effective and efficient C&S activities and advocacy efforts to meet the IOU's needs; such as:

- Tracking Project Teams progress to meet work scope milestones, identifying issues that could impact C&S project outcomes (e.g., red flag items such as schedule delays, changes in scope, etc.) and help to resolve open issues as they arise and as requested;
- Ensuring that C&S work is not duplicated by various Project Teams working on different advocacy efforts;
- Leveraging all Project Teams C&S research and projects to ensure they align and are consistent, despite being developed by different entities and do not conflict in their recommendations;
- Providing IOUs with consistent appliance standard guidance and instructions related to deliverables, schedules, meeting preparation and participation, and communications protocols amongst IOU staff and external stakeholders, etc. This includes dissemination of report templates, methodologies for technical analyses, and data used in all C&S reports produced;
- Coordinating reviews with the other IOUs concerning the deliverables from all Project Teams;
- Maintaining online collaboration and file sharing tools amongst the IOUs and various Project Team members and others (as determined by PG&E Project Manager) to enable sharing and accessing files related to the C&S appliance advocacy efforts;
- Ensuring the C&S advocacy efforts utilize a consistent and appropriate tone, messaging, branding, style, use of IOU names and logos, etc.;
- Assist the PG&E Project Manager with coordinating with other IOU teams outside of C&S working on projects related to or impacted by appliance advocacy efforts;
- Coordinating with the other IOU C&S teams; Collect the Code Change Theory Reports (CCTRs) from the other implementers and maintain a database of the CCTRs to support future evaluations;
- Assisting the PG&E Project Manager with maintaining communication with the Energy Commission's Appliance Standards, The DOE Appliance Standards and EPA Energy Star Offices (Regulatory Stakeholders) which may include developing agendas and notes for regularly-scheduled calls with Regulatory stakeholders and ensuring that key information and guidance from Regulatory Stakeholders is disseminated to all Project Teams in an effective and efficient manner; and

- Working with Project Teams to ensure that the necessary data is collected to complete the required information for the CPUC C&S Program evaluations.

Federal Consultant Role

The C&S advocacy process to support Federal appliance standards is complex and requires careful planning and project management to ensure success in assisting the CEC, DOE, Energy Star, and Federal Trade Commission (FTC) Notice and Comment Rulemakings, and DOE Appliance Standards Rulemaking Federal Advisory Committee (ASRAC) negotiations and regulatory process. The successful Bidder will need to assemble a team of subject matter experts who can rapidly assess and respond to DOE staff and other stakeholder proposals and issues.

The C&S Federal Consultant shall work under the direction of the PG&E Project Manager with guidance from a PG&E selected Program Coordinator and the other IOU's C&S Team. The Federal Consultant will be required to assemble a Project Team as listed below and may require additional experts that are adept in the issues involving individual federal rulemakings, or other specific matters required for the applicable C&S work to be successful. The C&S Federal Project Team shall consist of and have the following expertise:

1. Federal C&S Project Coordination

2. Rulemaking Research and Development

3. Support during the Rulemaking Process

4. Support during the Post-Rulemaking Process

5. Federal C&S Project Reporting and CCTRS

PG&E will require the services of the Federal Consultant on an ongoing and as needed basis, perform work, complete tasks, produce deliverables with associated due dates as mutually agreed in an issued written scope of work. The Federal Consultant work requirements and schedule will be largely driven by the Federal Appliance Standard Rulemakings, which is subject to change.

State Consultant Role

The C&S State Consultant will be required to assemble a team of subject matter experts to provide responses, further advocacy efforts that will maximize cost effective energy savings, technically feasible and available in the appliance market. Under the direction of PG&E, the State Consultant will assist in the development of CASE proposals to provide information for the Energy Commission to make informed policy decisions on efficiency enhancements to Title 20 Appliance EE

Standards and participation in public rulemaking processes for California's Title 20 rulemaking cycle.

The C&S State Consultant shall work under the direction of the PG&E Project Manager with guidance from the PG&E selected Program Coordinator and the other IOU's C&S Team. The State Consultant will be required to assemble a Project Team that is adept in the CASE measures as listed below. The State Consultant and may also be required to retain additional experts to address specific requirements for an individual specific CASE measure. The State C&S Project Team shall consist of and will require the following expertise:

1. State C&S Project Coordination

2. CASE Research and Development

3. Support during the Pre-rulemaking and Rulemaking Process

4. Support during the Post-rulemaking Process

5. State C&S Project Reporting and CCTRs

PG&E will require the services of the State Consultant on an ongoing and as needed basis, to perform work, complete tasks, produce deliverables with associated due dates as mutually agreed in an issued written scope of work. The State Consultant work requirements and schedule will be largely driven by the Energy Commission Title 20 Standards schedule and its updated schedule, which is subject to change.

2.2 Timing

The timing of the solicitation was moved up based on the need to have contracts in place in January 2020 to support the CEC's code cycle updates.[7] Due to the time constraints, it was not practical to go through a two-stage solicitation process, so there was only one stage (RFP) solicitation.[8] There was a reasonable amount of time given for bidders to respond and for the PG&E team and IE to score the proposals once received. Table 3 below shows Key Milestones for the solicitation.

Table 3: Key Milestones

Milestones	Completion Date
RFP Release	September 9, 2019
Bidders Conference	September 16, 2019

[7] The 2019 Title 24, Part 6 and Part 11 Standards were formally adopted by the Building Standards Commission in a formal hearing on December 5, 2018. The standards went into effect on January 1, 2020.

[8] D.18-01-004, COL 5, states: "All utilities should utilize a two-stage solicitation process for third party programs unless there is a specific schedule-related reason only one stage is possible."

Proposals Submitted	October 7, 2019
Scoring	October 25, 2019
Calibration	October 29, 2019
Shortlisting	November 26, 2019
Contract Negotiations	January 2020
Contracts in Place	Jan- Mar 2020

2.3 Key Observations

Key observations are identified in Table 4. One key recommendation by the IE was to make sure that solicitation processes and approaches were streamlined to encourage bidder participation and to reduce additional work where not appropriate.

In addition, the IE had some concerns about the low number of bidders submitting proposals. The expectation was that there would be at least four different companies bidding, which would have made for a larger pool to choose from and/or contract with. We recommend that PG&E expand outreach in future Codes & Standards solicitations in order to encourage additional bidders to submit proposals since a larger pool of implementors may result in a more robust program overall.

Table 4: Key Issues and Observations

Topic	Observations	IE Recommendations	Outcome (IOU Action/Response)
Three Consultant/Consultant Pools Being Sought for Three Scopes of Work	Initially three RFPs were contemplated.	Consolidate into one RFP with three distinct scopes of work and tasks defined to make it easier for bidders to review one document and select which one or multiple scopes they wish to respond to.	PG&E adopted this approach.

Scope of This Solicitation Very Different from Others	Process and distinctions need to be made very clear to the Procurement Review Group (PRG).	Present these differences and the RFP approach to the PRG so that any issues and questions can be addressed early in the process. Adapt solicitations based on scope of work and likely bidder pool.	PG&E was very clear in its approach to the PRG and bidders.
Limited Number of Bidders and Proposals	Because the scope and contracts for this work are very different from other solicitations, all proposals may end up being selected for the work since PG&E can distribute the work across multiple bidders.	Given that this went directly to RFP and there are limited bidders, serious attention needs to be paid to the proposals and any distinctions between them to justify decisions made to award the work. In addition, PG&E should investigate ways to expand the eligible bidder pool in the future.	PG&E ultimately contracted with all bidders to support C&S activities. Contract negotiations focused mainly on billing rates, staffing needs and success metrics to ensure that the needs of the program are met.
Need to Clarify the Triggering of an Advice Letter Based on Budget	Because there are three consulting opportunities being filled by two firms, the result is five contracts at various levels of funding with budget caps around $4.9 million for four contracts and about $900,000 for the Coordinator Role.	Given the trigger for an Advice Letter filing is $5 million, it is important to proactively communicate any questions and concerns with ED.	PG&E reached out to ED to make them aware of the contract amounts and ED confirmed that an Advice Letter was not required as each contract was for a 3year term and under $5 million.

3. Solicitation Outreach and Bidder Response

3.1 Bidder Response to Solicitation

PG&E used traditional outreach platforms, its own and California Energy Efficiency Coordinating Committee (CAEECC) websites and relevant CPUC mailing lists to cast a wide net for the RFP. However, given the nature of the program and the small number of firms with the appropriate qualifications who do not have conflicts with the work, the utility did not anticipate many bidders for this program solicitation.

Table 5: Solicitation Response	
Proposals Expected	4-10
Proposals Received	5 (from 2 bidders)
Proposals Disqualified	0

3.2 Bidders' Conference and Q&A

The Bidders' conference was held on September 17, 2019 via webinar. PG&E requested IE feedback on the Bidders' conference presentation and the feedback was incorporated into the final slide deck. Two bidder questions were received after the conference that related to potential conflicts of interest and subcontractors' role. PG&E responded promptly to these questions.

Table 6: Bidder Conference	
Bidder Conference Date	September 17, 2019
No. of Attendees	Unknown–via Webinar
No. of Q&A Received	2 questions after the Webinar

3.3 Solicitation Design Assessment

PG&E's Business Plan highlights the importance of achieving the California Long Term Energy Efficiency Strategic Plan's goals related to codes and standards. The Solicitation Plan also supports these goals. The RFP appropriately sought programs designed to deliver advocacy efforts that advance new codes and standards at the State and Federal levels.

PG&E conducted the solicitation in accordance with D.18-01-004. Consistent with this Decision, the IOU conducted a one-stage solicitation process due to the need to have program implementers in place to support 2020 codes and standards updates.[9] PG&E consulted with the PRG and IE prior to implementing a one-stage solicitation. The PRG and IE actively monitored all aspects of the solicitation.

4. RFP Design and Materials Assessment

4.1 RFA Design Requirements and Materials

Not applicable to this solicitation since there was only an RFP stage.

[9] 10 Ibid.

4.2 RFP Design Requirements and Materials

The IE closely coordinated and advised PG&E on several versions of the RFP materials. Overall, the process was transparent, and the IE and PG&E staff were very engaged with PG&E being very responsive to IE input. Discussions were robust and informative and as a result, the IE saw definite improvements in the overall approach and in the documents that were provided to bidders for this solicitation.

The basic format of the RFP and required documents from bidders is shown in Figure 2 below[10]:

Figure 2: Required Documents from Bidders

Narrative Response Form (20 pgs)	Data Response Form

• Pre-formatted template (.docx)
• Executive Summary (1 page)
• Program Description (9 pages):
  • Program Design (4 questions)
  • Innovation (1 question)
• Program Feasibility
  • Schedule & Milestones (2 questions)
  • Program Budget & Payment Structure (3 questions)
  • KPIs (1 question)
• Team Composition & Qualifications (10 pgs)
  • Team Composition (2 questions)
  • Team Resumes (PA upload)
  • Prior Program Implementation Experience (1 question)
	• Pre-formatted template (.xlsx)
	• Company Information & References
	• Detailed Role Information
	• T&M Cost Structure
	• Program Budget
	• Payment Structure
	• Key Performance Indicators
	• EM&V Activity/COI

4.3 Response to PRG and IE Advice

PG&E was very thorough in its consideration and adoption of IE and PRG recommendations and feedback. All IE, non-lead IOU and PRG recommendations were adopted and the RFP General Instructions, Narrative, and Scorecard reflected both an appropriate balance between requesting sufficient information from bidders and not being overly burdensome.

[10] Source: PG&E presentation to the PRG

5. Bid Evaluation Methodology Assessment

5.1 Bid Screening Process

PG&E's process and checklist for screening bids was fair and the information was clearly presented.

5.2 Scoring Rubric Design

The scoring rubric, with more detailed guidelines and criteria, was used for the scoring of the Statewide C&S Proposals, as shown in Table 7 below.

Table 7: Scoring Rubric

Category	Weighting
Program Design	[redacted]
Program Innovation	[redacted]
Program Management	[redacted]
Compensation & Performance	[redacted]
Implementer Qualifications	[redacted]
Experience	[redacted]
Supply Chain Responsibility	[redacted]

The scoring rubric and weightings struck an appropriate balance between the elements related to program design, program management, team and company experience, innovation, and compensation and performance.

PG&E was very responsive to the PRG's recommendations as it pertains to the Statewide C&S program. Because this is not a traditional resource program, without energy savings measurements and cost-effectiveness requirements, many of the standard PRG recommendations did not apply.

The information requested in the RFP was clear and provided a distinction between the three program areas. The scoring rubric was well balanced and reflected the PRG recommendations. The information requested in the RFP and provided by bidders in their proposals aligned well with the scoring.

5.3 Evaluation Team Profile

Given that the process for evaluating and scoring was very straight forward, no scoring training was conducted for this solicitation. Clear guidelines were given in an overview phone call with all scorers and the solicitation project lead for this

solicitation was available for questions throughout the process. The IE was provided with bios for each of the scoring team participants. The score team is described in Table 8 below.

Table 8: IOU Evaluation Team		
[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]

6. Response to PRG and IE Advice

PG&E thoughtfully considered, adopted and responded to PRG and IE advice, questions and concerns throughout the process.

7. Final Bid Selection Assessment

PG&E received five proposals from two bidders: Energy Solutions (for Coordinator, State and Federal support roles) and 2050 Partners (for State and Federal support roles). The IOU's bid ranking and selection process was applied fairly and consistently in the RFP selections. Given that this solicitation went directly to the RFP stage and there were limited bidders, serious attention needed to be paid to any proposals submitted and any distinctions between them needed to be analyzed to justify decisions to award the work.

PG&E decided to award each of the bidders the work as bid for the State and Federal code advocacy efforts and awarded Energy Solutions the Coordinator role. There has been an allocation of work between the two implementers, with the work ultimately managed by the PG&E Program Manager. Summaries of the two companies and their respective experiences are shown below:

Energy Solutions in Coordinator Role

- Have a strong bench of staff to support coordination
- Successful experience coordinating Building Codes

2050 Partners and Energy Solutions for both State and Federal Code Support Roles

- Complementary skill sets
- Experience working in state and federal appliance standards rulemakings
- Strong subject matter experts on various appliance types
- Strong industry and advocate relationships
- Successful experience increasing appliance standards
- Ability to collect vital primary research (lab work, equipment testing, web crawling)

7.1 Conformance with Established Evaluation Processes

The IOU conducted its evaluation in conformance with its established scoring criteria and process for the RFP. There were no non-conforming bids submitted.

7.2 Management of Deficient Bids

There were no deficient bids identified by PG&E. Prior to scoring the bids, PG&E's Supply Management staff reviewed all bids to verify the bids conformed to the RFP requirements (e.g., timeliness, completeness, etc.). The IE reviewed PG&E's assessment of the bids and found PG&E complied with its process.

7.3 Shortlist and Final Selections

a. Conformance with Established Evaluation Processes

The scoring criteria described in prior sections were applied consistently by PG&E in developing the final bidder selection for contracting. Given both bidders were well qualified for the work they proposed, there was not a shortlisting process. All bidders proceeded to the contracting stage for the role(s) they proposed.

Final bidders and contract amounts are shown in Table 9 below. Contract terms are through December 31, 2022.

Table 9: Final Contract Awards

Role	Company	Contract NTE	Date Executed
Coordinator	Cohen Ventures, Inc. (Energy Solutions)	$960,000	March 12, 2020

Title 20 Consultant	Cohen Ventures, Inc. (Energy Solutions)	$4,896,820	February 4, 2020
Federal Consultant	Cohen Ventures, Inc. (Energy Solutions)	$4,896,820	January 29, 2020
Title 20 Consultant	2050 Partners	$4,900,077	February 11, 2020
Federal Consultant	2050 Partners	$4,899,619	February 11, 2020

Because there are three consulting opportunities being filled by two firms, the result was five contracts at various levels of funding with budget caps around $4.9 million for four contracts and about $900,000 for the Coordinator role. Given one of the triggers for an Advice Letter filing is $5 million per contract, PG&E, with agreement from the IE, believed that it was important to proactively communicate any questions and concerns with the Energy Division (ED). PG&E reached out to ED staff to make them aware of the contract amounts, so they could provide feedback prior to the PRG meeting. The ED staff confirmed that an Advice Letter was not required because each contract term was a three-year term and under $5 million.

b. Portfolio Fit

The program addresses the portfolio needs by meeting the requirements of the C&S program for Federal and state appliance standards. In contrast to traditional resource programs, where there is often more of a challenge finding the right overall program fit as it relates to customer and portfolio needs, the clearly-defined C&S program objectives avoid such challenges. In addition, if needs of the C&S program change during the term of the three-year contract, the IOU can adjust consulting directives to make timely appropriate adjustments within the contract scope. Given the impacts of C&S changes in many other programs within the portfolio, it is expected that there will be future input and collaboration and data gathering related to C&S from local and statewide programs, including Statewide Plug and Load Appliances, Statewide Midstream, Heating, Ventilation, and Cooling (HVAC), Statewide Lighting, and Statewide New Construction, and Statewide Emerging Technologies offerings.

c. Response to PRG and IE Advice

PG&E followed the appropriate bidding process, considered PRG guidelines and input of the PRG and the IE to come to its final selection. There was very limited feedback from the PRG throughout the process. Final contracting raised three main questions to which PG&E provided answers that the IE believes to be reasonable and have been clarified in other sections of this report.

The questions and answers are below:

Q1: Explain to all PRG members why there are five different contracts for Statewide C&S
PG&E Response: • This RFP covers two C&S subprograms, the Title 20 state appliance standards advocacy and federal appliance standards advocacy. The plan for the state and federal appliance standards advocacy subprogram was to include multiple implementers for each subprogram and a coordinator to support for both subprograms. • Two implementers bid to support both subprograms and one implementor bid to be the coordinator. Since all bids were considered qualified and viable PG&E accepted all of them. There are separate scopes of works for each of the contracts. • PG&E staff considered combining the contracts for each individual implementor into two contracts but due to reporting and audit concerns, as well as administrative ease, the contracts were kept separate. If desired PG&E is willing to submit an advice letter to approve these contracts despite being under the $5 million dollar contract threshold.

Q2: Explain why the budget has changed since the last presentation from the Nov. 10 PRG meeting. For example, the 2050 Partners–Federal Standards has a budget of $4.9 million; but during the PRG meeting, PG&E presented $2.4 million
PG&E Response: • PG&E initially expected to have additional implementors bid (we expected 4), which would have meant smaller contracts for each implementer. Due to the expanded workload, both implementers revised their budget during negotiations. Since we received fewer bids the contracts are larger.

Q3: In reviewing the 2050 Partners Federal Consultant proposal summary, why is the Title 24 (Buildings) missing as part of the description in the breakdown of the contracts? Shouldn't Title 20 focus on the Federal government and Title 24 for the State?
PG&E Response: • There are three advocacy subprograms: 1) Title 24 building codes advocacy, 2) Title 20 state appliance standards advocacy, and 3) Federal codes and standards. The Title 24 building code contracts were bid out in November 2018 to meet the California Energy Commission's Title 24 schedule which began in January 2019. The Title 20 state appliance standards advocacy and Federal codes and standards advocacy were bid out at the same time in 2019. Title 24 work is missing from these scopes of work because that work is covered in other contracts.

7.4 Affiliate Bids and Conflict of Interest

There were no bids received from an affiliate and there were no conflicts of interest for this PG&E Statewide C&S solicitation.

8. Assessment of Selected Bids

PG&E was consistent and reasonable with their choices. Each of the bidders were well qualified for the work and were appropriately moved to contracting. All proposals complied with the PG&E solicitation requirements and were consistent with defined scope of work. No proposals were rejected.

8.1 Bid Selections Respond to Portfolio Needs

The selected programs meet the collective IOUs' need for a Statewide C&S program to implement the C&S appliance standard advocacy activities that are intended to influence appliance standards and test procedures at the state and national levels. The three programs selected fulfill two CPUC directives for PG&E: (1) to administer the Statewide C&S program on behalf of all California IOUs and (2) to select, through a competitive solicitation, third party program implementers to propose, design and implement EE programs.

In addition to the CPUC directives, California recently adopted multiple goals, such as Senate Bill 1477 and Assembly Bill 3232, that are focused on increasing EE to meet the ambitious state climate goals. All future codes and standards must also align with these laws. The selected Statewide C&S programs directly support these policy objectives.

8.2 Bid Selections Provide Best Overall Value to Ratepayers

First and foremost, this program is a resource program that is implemented through time and materials consulting contracts and has been delivering significant energy savings for all of the IOU EE portfolios through driving code adoption. It is very different in its nature from traditional local and Statewide resource programs, so to evaluate the best overall value to ratepayers requires viewing through a different lens. In 2020 alone, PG&E forecasts the C&S program to deliver 65% of the energy savings in the PG&E EE portfolio at a budget level of about 10% of the overall program budget[11], so the program is providing significant value to ratepayers.

Second, the selected program proposals and bidders were considered to provide the best overall value to ratepayers based on the proposals received. At the RFP stage,

[11] Advice 4136-G/5627-E, PG&E's 2020 Energy Efficiency Annual Budget Advice Letter in Compliance with Decisions 15-10-028 and 18-05-041

the pool consisted of 5 proposals and 2 bidders. Although this solicitation resulted in a limited bidder pool and all bids being selected, PG&E worked to negotiate lower billing rates with each of the firms to increase the overall value of each contract. The small bidder pool was expected as very few firms have the technical expertise being requested. Each of these bidders are very experienced in supporting the advancement of codes and standards at the state and federal levels and are currently providing similar services to PG&E in support of the current C&S program. Based on past accomplishments of the program[12], these program implementers will likely be successful in advocating for new codes and standards that maximize cost effective energy savings for Californians.

As observed earlier, the only issue identified by the IE in the process that may contribute to increasing ratepayer value was the lack of a robust bidder pool**.** The expectation was that there would be at least four different companies bidding, which would have made for a larger pool from which to choose and /or contract with**.** We recommend that PG&E expand outreach in future C&S solicitations in order to encourage additional bidders to submit proposals because a larger pool of implementors may result in a more robust program overall and allow PG&E to drive for additional savings.

9. Reasonableness of Contracting Process

9.1 Collaboration on Final Program Design and Scope

Final program design and scope of work was very straight forward given the nature of this work is time and materials and the scopes were adopted based on the RFP and the proposals provided. No changes were made to the program design or scope by either PG&E or the bidders during contract negotiations. Each of the bidders awarded the work have been in these roles previously, so the effort and the coordination with PG&E is not new to them.

The program's draft Implementation Plan (IP) was submitted to the public for review on May 26, 2020. A public workshop presenting the draft IP was held on June 2, 2020. Only one question was asked during the workshop and during the comment period following and was a request to have access to the presentation, which was provided. The IE has monitored the development of the draft IP and the public workshop. The final Implementation Plan was uploaded to the California Energy Data and Reporting System (CEDARS) on June 12, 2020, three months after execution of the final contract for the program.

[12] PG&E 2018 Energy Efficiency Annual Report, Codes & Standards Chapter, pages 57-67

9.2 Fairness of Negotiations

PG&E's contract negotiations were conducted fairly. On December 18, 2019 and December 19, 2019, PG&E held initial meetings with the two selected firms to discuss contract terms. The meetings were attended by various representatives of the bidders, PG&E program staff, PG&E sourcing staff and the IE. Given that both bidders proposed time and materials contracts with discrete budget caps within the overall program budget, the meetings were primarily focused on billing rates and the need to ensure specific staff will be available to conduct the work.

The bidders committed to making PG&E aware of any staff changes throughout the contract lifecycle. Also, in response to bankruptcy requirements, the bidders agreed to reducing billing rates for the first six months of the contract life consistent with other pre-existing contracts that the bidders had with PG&E for other activities. The reduced billing rates and set rates for the remainder of the contract are reasonable and appear to be within acceptable industry rates. In addition, the increase in rates will not impact the contract cap.

9.3 Changes to Contract Terms & Conditions

During January 2020, PG&E held contract negotiations with the selected bidders that included a review and exchange of draft contracts. All terms and conditions were agreed to by both parties. The IE monitored all exchanges among the contracting parties throughout the negotiation process, which went smoothly between the bidders and PG&E.

We have some comments about the process, however. First, it was very difficult to identify the CPUC standard and modifiable terms and conditions as they were comingled with PG&E's additional terms throughout the contract. PG&E did provide a mapping of the CPUC standard, the CPUC modifiable, and the IOU's proposed additional terms and conditions to the IE and to the CPUC in presentations and along with the contracts themselves. This mapping proved very useful, yet it was not provided to the bidders during contract negotiations. In the future, and to support CPUC direction, a CPUC terms and conditions mapping should be provided to bidders at the onset of contract negotiations.[13]

Second, the IOU supplemented the CPUC standard terms and conditions in the contracts. The supplements were not extensive and did not alter or change the CPUC standard terms but merely clarified some of the language. The CPUC

[13] D.18-10-008, OP 7 states "The utility program administrators (Pacific Gas and Electric Company, San Diego Gas & Electric Company, Southern California Edison Company, Southern California Gas Company) shall, and other program administrators may, include as modifiable or negotiable contract terms for third parties bidding to design and/or deliver energy efficiency programs under the energy efficiency rolling portfolio, as required by Decision 18-01-004, the terms included in Attachment B to this decision. **Other negotiable contract terms may also be included, but those in Attachment B are required as the starting point for negotiations.** The modifiable terms in Attachment B to this decision and any others put forward by the utilities may only be modified by mutual agreement between the utility program administrator and the third-party bidder." [Emphasis Added]

standard terms and conditions are also included in the contracts, with some modifications that were mutually agreed to by both parties.[14]

Finally, to avoid potential conflict among any PG&E terms and the CPUC standard terms and conditions, future IOU contracts should include additional language that clearly states the CPUC standard terms control and govern throughout the contract.

9.4 Conformance with CPUC Policies and Objectives

For this solicitation, there were three consulting opportunities filled by two firms with five contracts at various levels of funding with budget caps of around $4.9 million for four contracts and about $900,000 for the Coordinator Role. Given the trigger for an advice letter filing is $5 million per contract,[15] it was important for PG&E to proactively communicate any questions and concerns with the CPUC's ED. PG&E proactively reached out to ED staff to make them aware of the proposed contract amounts and sought feedback. ED staff confirmed that an advice letter was not required since each contract was for a three-year term and under $5 million. There was some general concern from the ED that the contract amounts edged very closely to the $5 million mark. Adding to this concern, the final contract amounts were approximately half of the original proposed contract amounts for state and federal consultants.

PG&E's rationale for this was that there were fewer bidders than expected and that they needed to increase the work and contract levels for each of the state and federal contractors. PG&E initially expected to have additional implementers bid and perform the work (expected four), which would have meant smaller contracts for each implementer. Due to the expanded workload, both implementers revised their budget during negotiations. Because PG&E received fewer bids, the contracts are larger in scope and size.

From the IE perspective, the optics of this may have appeared to be an attempt by the IOU and/or the Implementer(s) to avoid delays in contract implementation caused by an advice letter review and approval process. It is not surprising that each of the final contract amounts are just below $5 million.

However, to address this appearance of avoiding an advice letter process, PG&E did clearly indicate its openness to submit advice letters to the PRG. Ultimately, the PRG supported PG&E approach to maintain the contract levels at their negotiated amounts of less than $5 million and therefore not trigger an advice letter filing.

[14] Id.

[15] D.18-01-004, OP 5.d states "An individual report on the solicitation process resulting in any contract award valued at $5 million or greater and/or with a contract term of longer than three years, to be submitted along with the Tier 2 advice letter seeking Commission review of such contracts.'

Innovation

Innovation as it relates to the C&S Program is different from other programs. The RFP required that proposals demonstrate the bidder's ability to provide innovative strategies in responding to rulemakings. To demonstrate a proposed response is innovative, the RFP asked bidders to include in their proposals:

- A clear and concise rationale for why updated or re-designed data collection strategies or modified outreach approaches (including using new relationships or partnerships) would yield better results than previous responses;

- A high-level analysis showing how the innovative approach will yield better results beyond existing strategies; and

- Metrics to track progress.

Innovative aspects of the adopted proposals included:

- Utilizing innovative approaches to data collection including primary data collection approaches and web-scraping
- Employing customer surveys, focus groups and other qualitative research methods
- Modeling of site-energy savings as well as greenhouse gas abatement potential for all proposals
- Supporting rulemakings with legal consulting to address significant legal questions
- Providing a strategic lead to support all areas of rulemakings
- Implementing diverse and innovative outreach and stakeholder engagement approaches including digital, in-person strategies and coalition-building

Although innovation as applied to a Codes & Standards program (via consulting contract) is different from innovation as applied to traditional resource programs, the selected proposal's innovation strategies align with PG&E's desired outcome. For example, the data collection strategies presented by the bidders included modified approaches to data collection compared to traditional approaches. Presumably these approaches build on current program activities and, expanding their reach, while reducing data collection costs and improving the quality of the data collected. This also aligns with the PRG's recommended approach to capture cost reductions in program delivery and improve the effectiveness of the program.

Contract Completion

It was originally expected that all contracts would be executed in January 2020 to keep the process on track to meeting the C&S deadlines related to the consulting efforts that are aligned with supporting the CEC's codes cycle updates. Contracts were signed between late January and mid-March 2020. The timing has not negatively affected the program nor its support for the upcoming code changes.

9.5 Uniformity of Contract Changes

During contract negotiations, the focus was mainly on Key Performance Indicators (KPIs) and rates. Other contract provisions were presented uniformly to each bidder. All major contract provisions were adopted without modification.

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.

Confidential Market Sensitive Information
Protected Under Public Utilities Code Section
454.5(g) and/or D. 06-06-066.

PACIFIC GAS AND ELECTRIC COMPANY

PART 2 CONFIDENTIAL VERSION

April 19, 2022

Confidential Market Sensitive Information
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Confidential Appendix A

Statewide Codes and Standards Federal Appliance Advocacy Energy Efficiency Third-Party Solicitation Advice Letter

Final IE Report (Confidential)

Confidential Market Sensitive Information
Protected Under Public Utilities Code Section
454.5(g) and/or D. 06-06-066.

Confidential Appendix B

Statewide Codes and Standards Federal Appliance Advocacy Energy Efficiency Third-Party Solicitation Advice Letter

Solicitation Process Overview (Confidential)

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Confidential Appendix C

Statewide Codes and Standards Appliance Standards Advocacy Energy Efficiency Third-Party Solicitation Advice Letter

Selection Spreadsheet (Confidential)

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Confidential Appendix D

Efficiency Third-Party Solicitation Advice Letter

Third-Party Contract Summary (Confidential)

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Confidential Appendix E

Efficiency Third-Party Solicitation Advice Letter

Contract
(Confidential)

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.
Braun Blaising Smith Wynne, P.C.
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
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
Engineers and Scientists of California

GenOn Energy, Inc.
Goodin, MacBride, Squeri, Schlotz & Ritchie
Green Power Institute
Hanna & Morton
ICF
International Power Technology

Intertie

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
McClintock IP
McKenzie & Associates

Modesto Irrigation District
NLine Energy, Inc.
NRG Solar

OnGrid Solar
Pacific Gas and Electric Company
Peninsula Clean Energy

Pioneer Community Energy

Public Advocates Office

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
Uplight
Water and Energy Consulting Wellhead Electric Company
Western Manufactured Housing Communities Association (WMA)
Yep Energy