

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

Order Instituting Rulemaking Concerning Energy
Efficiency Rolling Portfolios, Policies, Programs,
Evaluation, and Related Issues.

Rulemaking 13-11-005

**SOUTHERN CALIFORNIA EDISON COMPANY'S (U 338-E) SUBMISSION OF THE
SEMI-ANNUAL INDEPENDENT EVALUATOR REPORT ON THE THIRD-PARTY
SOLICITATION PROCESS**

PUBLIC VERSION

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Dated: **June 18, 2021**

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Pursuant to the Rules of Practice and Procedure of the California Public Utilities Commission (Commission or CPUC), and in compliance with Commission’s Decision D.18-01-004, Southern California Edison Company (SCE) submits, on behalf of the independent evaluators (IEs), this Semi-Annual Independent Evaluators’ Public Report on the Third-Party Solicitation Process of Southern California Edison Company. The Commission in D.18-01-004 required that the IEs, among other things, “shall also provide assessments of the overall third party solicitation process and progress, on at least semi-annual basis, to the Commission via reports filed in the relevant energy efficiency rulemaking (currently R.13-11-005).¹

Because the IEs are not parties to the energy efficiency proceeding, SCE is filing this semi-annual report regarding SCE’s third-party solicitation progress (from October 2020 through March 2021) on behalf of the IEs, who prepared the report. Concurrent with the submission of

¹ D.18-01-004 at p.38 and Ordering Paragraph.

the IEs' public version of the semi-annual report, SCE is filing a confidential version of the same report to the Commission through a Motion to File Under Seal.

Respectfully submitted,

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June 18, 2021

Appendix A

Semi-Annual Independent Evaluator Report [PUBLIC VERSION]

Semi-Annual Report

SOUTHERN CALIFORNIA EDISON COMPANY

Third Party Energy Efficiency Program Solicitations

Reporting Period: October 2020 through March 2021

PUBLIC VERSION-REDACTED

Prepared by Independent Evaluators:

Barakat Consulting, Inc.

Don Arambula Consulting

MCR Corporate Services

June 11, 2021

Disclaimer: This report includes sensitive and confidential information.

INDEPENDENT EVALUATORS' SEMI-ANNUAL REPORT

SOUTHERN CALIFORNIA EDISON COMPANY

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I. Overview

A. Purpose

The Independent Evaluators' (IE) Semi-Annual Report (Semi-Annual Report or Report) provides an assessment of Southern California Edison Company's (SCE or the Company), third-party energy efficiency (EE) program solicitation process and progress by SCE's assigned IEs.

Each investor-owned utility (IOU) is required to select and utilize a pool of IEs with EE expertise to serve as consultants to the Procurement Review Group (PRG).¹ For the entire solicitation process, the IE serves as a consultant to the PRGs, participates in PRG meetings, and provides assessments of the overall third-party solicitation process and progress.² The IEs are privy to viewing all submissions, are invited to participate in the IOU's solicitation-related discussions, and are bound by confidentiality obligations.

In Decision 18-01-004, the California Public Utilities Commission (CPUC) directs that a semi-annual report on the overall process and conduct of the third-party solicitations be filed in the relevant EE rulemaking proceeding.³ This Report is provided in response to this requirement and represents an assessment of the program solicitation activities conducted during the period from October 1, 2020 through March 31, 2021. This Report is intended to provide feedback to SCE, the PRG, and other stakeholders on the progress of SCE's EE program solicitations in compliance with this CPUC direction.

These Reports will be filed periodically throughout SCE's entire third-party solicitation process. This Report identifies areas for improvement and highlights effective practices as noted by the IEs based on SCE's current program solicitations. The Report does not replace the required Final IE Solicitation Reports, which will be provided to SCE and its PRG by the assigned IE at the conclusion of each solicitation.

B. Background

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 non-utility personnel under contract to a utility program administrator (PA). In January 2018, the CPUC adopted Decision 18-01-004 directing the four California IOUs—SCE, Pacific Gas and Electric (PG&E), San Diego Gas & Electric (SDG&E), and Southern California Gas Company (SoCalGas)—to ensure that their EE portfolios contain a minimum percentage of third-party designed and implemented programs by

¹ Decision 18-01-004, OP 2.

² Id, p. 38.

³ Id, OPN 5.c.

predetermined dates over the next three years.⁴ Further directions were included in Decision 18-05-041, which states:

*The third-party requirements of Decision 16-08-019 and Decision 18-01-004 are required to be applied to the business plans of the investor-owned utilities approved in this decision. All utility program administrators shall have at least 25 percent of their 2020 program year forecast budgets under contract for programs designed and implemented by third parties by no later than December 19, 2019.*⁵

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 EE portfolio. All IOUs are required to conduct a Request for Abstract (RFA) solicitation, followed by a full Request for Proposal (RFP) stage.⁶

The CPUC also requires each IOU to assemble an EE PRG. The IOU's 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 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.

Extension Request

In a letter dated October 31, 2019, SCE requested an extension to December 31, 2020 to complete its Residential, Industrial, and Commercial programs. In November 2019, the CPUC granted SCE's extension request with modification: SCE shall have until September 30, 2020 to comply with Ordering Paragraph 4 of Decision 18-05-041 and meet the 25 percent threshold⁷.

The CPUC further stated that, consistent with Decision 18-05-041, the IOUs must meet at least 40 percent of their EE 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

⁴ In Decision 18-05-041, OPN 4, the CPUC extended the original target date for the 25 percent threshold from December 31, 2019 to December 19, 2019.

⁵ Id.

⁶ Decision 18-01-004, p. 31. The Decision further states that the "two-stage process should be used unless there is a specific schedule-related reason that a shortcut must be used."

⁷ 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.

meeting the third-party percentage requirements specified in Ordering Paragraph 4 of Decision 18-05-041.

Guidance Letter from the Energy Division

On March 11, 2020, the Energy Division provided additional guidance to the IOUs in response to concerns raised during the semi-annual CPUC-hosted public workshops about solicitation delays:

Solicitation Schedules

- Allocate up to 12 weeks from RFA release to notification of bidders of invitation to respond to RFP.
- Allocate up to 15 weeks from RFP release to notification to bidders' invitation to contract negotiation.
- Execute contract 12 weeks after invitation to contract negotiation unless IOU is conducting multiple negotiations within the same solicitation, the program is complex, or contract is addressing challenging contract elements.
- Update the solicitation schedules in the next quarterly update.

RFA Guidance

- Adhere to the intent of the RFA stage explained in CPUC Decision 18-01-004.
- Refrain from requesting excessive detail in the RFA stage.

IOU Communication to Bidders

- Notify bidders of the status of the solicitation throughout the entire process.
- Provide better feedback to bidders by delivering on commitments made in response to stakeholder requests.
- Provide non-advancing bidders notification if their abstracts/proposals didn't advance due to being incomplete or non-conforming, a violation, or an unmitigated conflict of interest.
- After the June 30 and September 30, 2020 deadlines were met, Energy Division encouraged the IOUs to make feedback available to bidders notified prior to the date of this letter that they did not advance to the next stage of solicitations.

C. Overview of Solicitations

This Report represents a collection of individual IE assessments for each of SCE’s active program solicitations. For ease of review, the Report also provides an overview of solicitation activities and a high-level summary of issues and potential recommendations gleaned from the individual IE assessments. The Report does not address program solicitations for which SCE has yet to release an RFA.

Table C.1 lists each of SCE’s current third-party solicitations including a breakdown of each solicitation, assigned IE, and status.

Table C.1: Solicitations Overview		
Solicitations	Assigned IEs	Solicitation Status
Local Residential, Commercial, Industrial (RCI)	MCR Corporate Services (MCR)	Contracted
Statewide Lighting	Barakat Consulting, Inc. (Barakat)	Contracted
Statewide Emerging Technologies (Electric)	Barakat	RFP
Local Agricultural	Don Arambula Consulting (DAC)	RFA
Local Public	DAC	RFA
Statewide Higher Education	MCR	RFA
Statewide Water and Wastewater Pumping	MCR	RFA
Legend Pre-RFA: Activities conducted prior to RFA release RFA: Includes bid preparation and evaluation period Pre-RFP: Activities conducted prior to RFP release RFP: Includes bid preparation and evaluation period Contracting: Contract negotiations Contract Executed: Contract executed with implementer Suspended: Solicitation held until a later date Cancelled: Solicitation withdrawn; scope may be included as part of a future solicitation		

During the current solicitation process, the following contracts have been executed and applied to SCE’s minimum third-party program threshold requirement as directed by the CPUC in Ordering Paragraph 4 of Decision 18-05-041. Please note that this table is for historical reference only; no additional contracts were executed during the current reporting period.

Table C.2: Summary of Executed Contracts					
Solicitation	Implementer	Program Name	Contract Execution Date	Contract Value ⁸	Diverse Business Enterprise (DBE)% ⁹
RCI – Residential	Enervee	Choice Engine	September 29, 2020	[REDACTED]	0%
RCI – Residential	ICF	Residential Behavioral	September 29, 2020		10%
RCI – Commercial	ICF	Commercial Behavioral	September 29, 2020		
RCI - Residential	Willdan	Multifamily	September 29, 2020		40%
RCI – Commercial	Willdan	Commercial	September 29, 2020		
RCI – Industrial	Willdan	Industrial	September 29, 2020		
Statewide Lighting	TRC Solutions, Inc.	Statewide Lighting	September 29, 2020		17%

D. IE Assessment of Solicitations

The following are key observations gleaned from the individual IE reports on specific solicitations, as presented in Attachment II. Corresponding details are provided in Table D.1, including a summary of IE recommendations and outcomes.

Key issues are related to the following areas:

- 1) **EE Form Agreement Starting Point:** SCE agreed to use the EE Form Agreement terms negotiated for all market participants in the prior local solicitation as the starting point for the resource program solicitations.

⁸ All contract values as of September 30, 2020; final values will be reflected in Advice Letter filings and IE Final Reports

⁹ The DBE spend is an estimate from the contracts to show percentage of the budget that is expected to be subcontracted with DBE firms. These programs may contain significant levels of customer incentives that are not eligible for DBE classification. Actual DBE spend will be reported on by the IOU per GO 156.

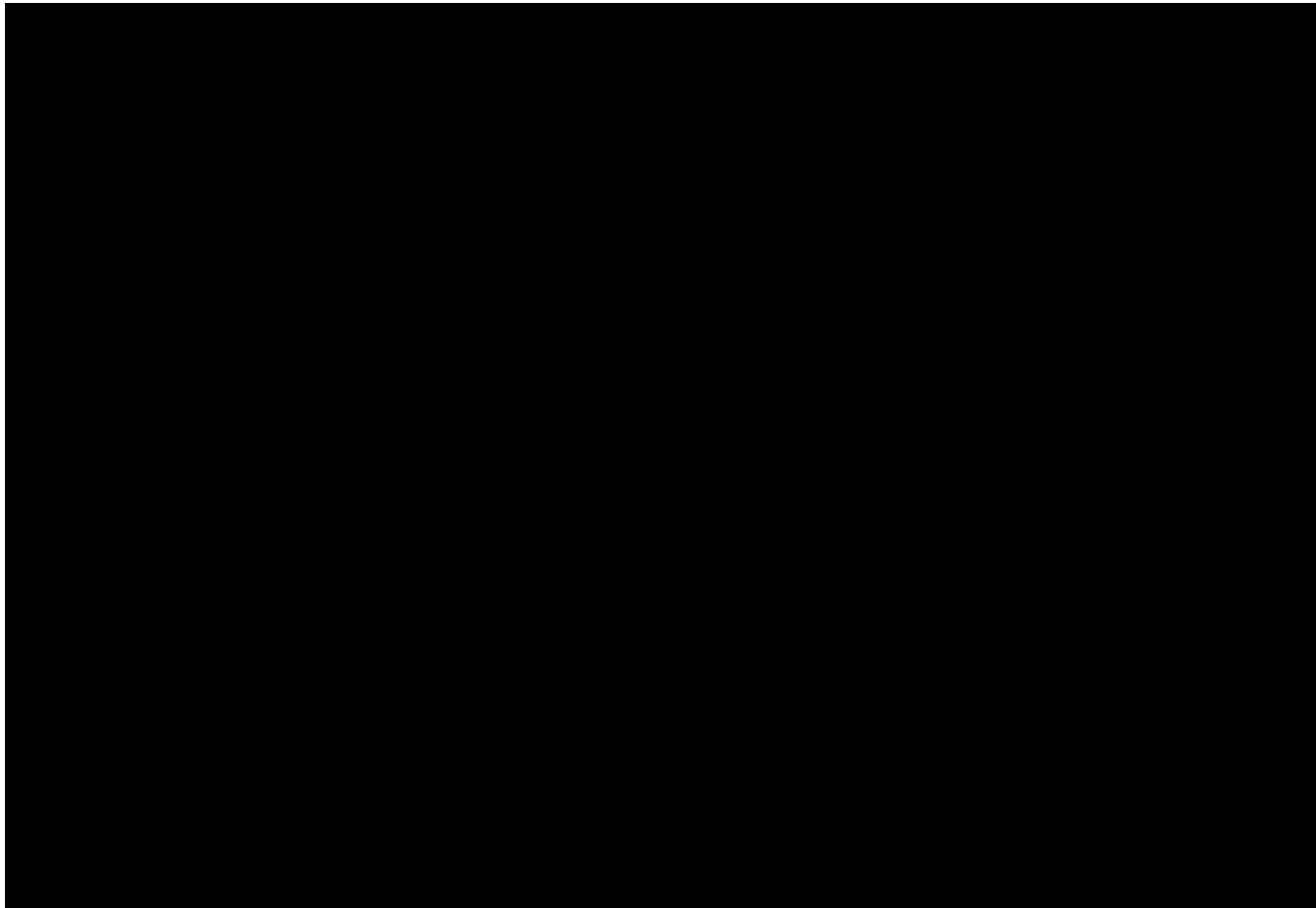


Table D.1 reflects a detailed summary of IE recommendations and outcomes.

Table D.1: Key Issues and Observations			
Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
RFA Stage			
[Redacted Content]			
Word Limits	Each of the questions requiring a bidder response has a word limit but does not indicate any implications for violating the word limit.	Provide bidders with a warning that exceeding word limits may impact their score.	SCE added a warning in the QRF to inform bidders that word limits will be enforced, and violations may be considered non-responsive.

Table D.1: Key Issues and Observations

Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
[Redacted content]			

Table D.1: Key Issues and Observations

Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
[Redacted content]			

Table D.1: Key Issues and Observations

Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
[Redacted Content]			

Table D.1: Key Issues and Observations

Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
[Redacted content]			

E. Effective Solicitation Practices

As the EE Solicitations developed, the IEs observed effective practices that helped make the process more fair, efficient, and transparent. In some cases, these practices are applicable across all solicitations, and generally these were incorporated into the PRG guidelines to drive standard practice across all IOUs. In most cases though, practices listed were effective in context: given the specific circumstances and approach taken by the IOU, what was done worked especially well. It is important to reinforce that many of these items are not generally standardizable across other contexts, and that IEs have not performed the external research and deeper analysis necessary to deem these solicitation “best practices”.

The IEs recommend that these effective practices be reinforced and maintained by the IOU. Their relevance to other IOUs/solicitations should be considered by all of the IOUs for EE solicitations.

Table E.1: Effective Solicitation Practices

Effective Practice	IE Analysis
[REDACTED]	[REDACTED]
Real-Time Answers at Bidders Conference	The Bidders’ Conferences are being conducted on MS Teams, with key SMEs available on another call simultaneously and behind the scenes to field questions and provide answers in real time for bidders. All responses are also provided in writing and answers can also be deferred until after the Conference.
Transition Bidder Response Form to a Word-based Forms	The RFA and RFP bidder responses use a combination of Workbooks (to capture data) and MS Word-base forms (to capture narratives) along with a word or page count. Preparation is likely much easier in these formats. Offer evaluation is much more efficient.
Reduced Number of Bidder Questions at the RFA Stage	Reducing the number of bidder questions at the RFA stage reduces the burden on both the bidder and the IOU while capturing enough information to evaluate the proposal.

F. PRG Feedback on Solicitations

SCE accepted the feedback from PRG on a number of significant issues. [REDACTED]

[REDACTED]

G. Stakeholder Feedback from CPUC Workshops

January Stakeholder Meeting

The CPUC, pursuant to Decision 18-01-004, held a public stakeholder workshop on January 29, 2021. The session focused on recapping activities of all of the EE third-party solicitations from both the IOUs' and the IEs' perspectives and providing an opportunity for stakeholders to ask questions and receive updates on the EE Third-Party solicitations. Participants included PRG members, IEs, CPUC Energy Division staff, IOUs, stakeholders, and bidders. Presentations and agendas from the workshop are available on the California for Energy Efficiency Coordinating Committee's (CAEECC) website.¹⁰

The IOUs reported on the status of their solicitations and the IEs presented observations from the last semi-annual report.

Open Forum

The main topics that were raised and discussed by stakeholders included the following¹¹:

- **IOU Receptivity to IE Advice.** California Efficiency + Demand Management Council (CEDMC) noted that stakeholders appreciate the IE role. The IE expertise in the EE industry is critical for providing technical support to the IOUs. The concern is that the IOUs are not listening to the IEs and there is not enough transparency to the stakeholders on what is adopted and what is not. The IOUs responded that, while there are some issues that cannot be made public, it should be noted that the IOUs are adopting the large majority of IE suggestions during the process. The IE reports support the IOU's statement on this issue.
- **Solicitation Timing.** CEDMC shared that, across-the-board, the timing of the process is better, with better visibility, but there are still concerns about the length of time (much driven by the need for stakeholder involvement) for solicitations. The time third-party solicitations have taken to date is an outlier within the EE industry. PG&E responded that they are implementing improvements to shorten timelines. SCE remarked that the schedules started at a slower pace but were improved with each solicitation. Some delays have been the result of the time necessary for the PRG review and meeting.
- **Small Business/Disadvantaged Enterprises.** CEDMC observed that there is little

¹⁰ <https://www.caeccc.org/third-party-solicitation-process>.

¹¹ This information reflects comments made by stakeholders in the meeting and is not necessarily aligned with IE observations/opinions

room for small businesses to participate in these solicitations. Onerous terms and conditions pose significant challenges for small or disadvantaged businesses. The IOUs agreed that this issue is a high priority. SDG&E is working on better outreach to vendor communities and noted that the IEs are helping to provide help with improvements. PG&E is focused on enabling small businesses to engage in many ways, including in teams as primes or sub-contractors. SCE is looking into more small businesses and disadvantaged business enterprise opportunities. The IEs are tracking the percentage of contracts awarded to small and minority business as either the prime or subcontractor. Small Business Utility Advocates (SBUA) noted they are aware of the tradeoff between the focus on program cost-effectiveness and encouraging innovation and recommended greater outreach to various organizations, such as Supplier Clearinghouse, National Minority Council, Women-Owned Businesses, and Disabled Veterans to potentially partner to increase opportunities for small businesses to participate in solicitations.

- **Feedback to Bidders.** Although there have been improvements to the feedback process, concerns remain that there is a lack of progress on providing meaningful feedback to unsuccessful bidders. The IOUs maintain that, because of confidentiality and legal issues, feedback to bidders must be kept at a high level. The IOUs are working to improve their feedback and are considering potential ways to share aggregated lessons learned and to make conversations with bidders more “two-way”. The IOUs noted that feedback is currently provided upon request.

Electronic Technical Reference Manual (eTRM) Improvements

The Energy Division presented technological improvements they are incorporating into the eTRM. This publicly-available and easily accessed tool serves as the statewide repository for California's deemed energy efficiency measures, along with supporting documentation. The new tool can be found here: <https://www.caetrm.com/login/>.

Stakeholders recommended the following related to eTRM/CET:

- Adding a Deemed Pick List (as PG&E provided) would assist in inputting deemed measures into the CET
- Accommodating Mac users
- Including the ability to address multiple climate zones/multiple IOUs
- Including a consideration of societal costs from the IDER Decision

Next Steps/Meetings

The Energy Division intends to have a follow-up meeting to address issues raised in this forum and to follow up on conversations. It is important that stakeholders provide feedback on topical areas to help focus these follow-up meetings.

II. Attachments: Individual IE Semi-Annual Solicitation Reports

Energy Efficiency Independent Evaluator's Semi-Annual Report on the

Local Residential, Commercial, and Industrial Programs Solicitation

Reporting Period: October 2020 through March 2021

Prepared by:
MCR Corporate Services




Disclaimer: This report includes sensitive and confidential information.

Local Residential, Commercial, and Industrial Programs

7. Implementation Plan Assessment¹²

On March 24, 2021, SCE hosted public workshops for both the Commercial Behavioral Program and the Residential Behavioral Program Implementation Plans (both programs implemented by ICF).



Stakeholder Workshops

The ICF Commercial and Residential Behavioral Program Implementation Plan Workshops on March 24 were each scheduled for one hour; the workshops concluded in approximately 35 minutes. Approximately 20 people attended each presentation and ICF presented its draft implementation plans and fielded questions from participants during the Commercial presentation. There were no questions on the Behavioral presentation. Questions from participants included a request for referenced data showing significant savings from this commercial behavioral design as well as clarification on data accuracy. Additional questions focused on how participants will receive the Business Energy Reports and additional details around ICF's selection of treatment and control groups.

MCR notes that the Implementation Plan Workshops provide a lot of good information on the programs and should be of interest to a broader audience. We recommend that IOUs broaden their notification of the workshops to ensure all interested parties are aware of these opportunities.

¹² Sections 1-6 addressing the entire solicitation and selection process were included in previous Semi Annual Reports.

Energy Efficiency Independent Evaluator's Semi-Annual Report on the
Statewide Lighting Solicitation

Reporting Period: October 2020 through March 2021

Prepared by:
Barakat Consulting, Inc.

Barakat Consulting
I N C O R P O R A T E D

Disclaimer: This report includes sensitive and confidential information.

Statewide Lighting Programs

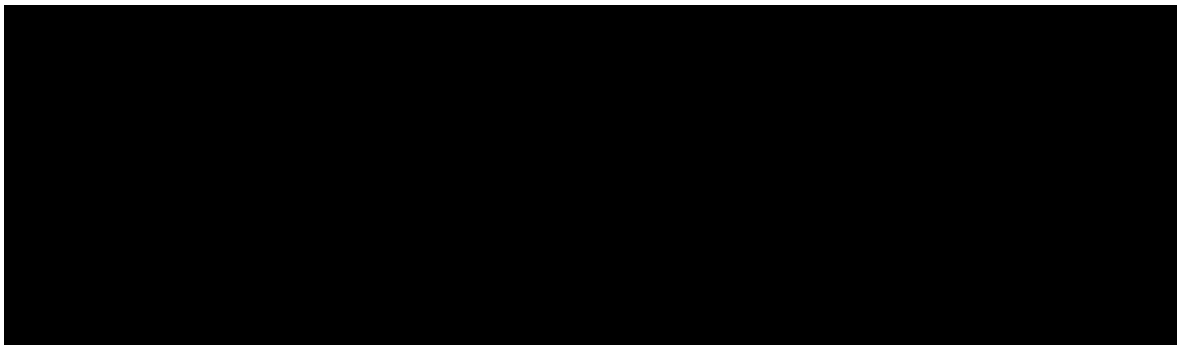
7. Implementation Plan Assessment¹³

Review of Draft Implementation Plans

Barakat Consulting Inc. (Barakat) was provided the draft Implementation Plan in January 2021 and provided comments following the Stakeholder meeting. Barakat was given a new draft in early February and provided additional feedback on the revised draft on February 8, 2021. A summary of the selected program is shown in the table below:

7.1: Solicitation to Meet Portfolio Goals					
Solicitation	Company	Program Name	Contract Execution Date	Contract Amount	Diverse Business Enterprise (DBE) % ¹⁴
Statewide Lighting	TRC Solutions, Inc. (TRC Solutions)	Statewide Lighting	September 29, 2020	██████████	17%

The topics of our feedback included the following:



We understand that the final implementation plan was posted via the California Energy Data and Reporting System (CEDARS) by February 18, 2021.

¹³ Sections 1-6 addressing to the entire solicitation and selection process were included in previous Semi Annual Reports

¹⁴ The DBE spend is an estimate from the contracts to show percentage of the budget that is expected to be subcontracted with DBE firms. These programs may contain significant levels of customer incentives that are not eligible for DBE classification. Actual DBE spend will be reported by the IOU per GO 156.

Stakeholder Meeting

TRC Solutions presented their draft implementation plan in a one-hour public webinar hosted by SCE on January 25, 2021. Approximately 30 people attended. Questions focused on scope of the program, clarification about how the program would avoid overlap with other Statewide and local programs and quality control inspection activities.

For future Stakeholder meetings, we recommend a broader audience be notified so that more Stakeholders are aware of the final program elements. Notifying unsuccessful bidders in the various solicitations could also help answer questions they may have about the final selection.

Energy Efficiency Independent Evaluator's Semi-Annual Report on the

Statewide Electric Emerging Technologies Program Solicitation

Reporting Period: October 2020 through March 2021

Prepared by:
Barakat Consulting, Inc.

Barakat Consulting
I N C O R P O R A T E D

Disclaimer: This report includes sensitive and confidential information.

Statewide Electric Emerging Technologies Program

1. Solicitation Overview

1.1 Overview

SCE seeks offers for managing the Statewide Electric Emerging Technologies Program (ETP or EETP) on behalf of itself, SDG&E, and PG&E, that include new approaches to the ETP, that serve residential and non-residential customers' needs for highly energy efficient equipment, that are designed and implemented by offerors uniformly throughout each of the Statewide Electric IOU's service territories, and that satisfy shared EE and statewide goals at the lowest cost.

a. Scope

SCE seeks offers for electric emerging technologies program(s) that satisfy shared EE and ETP goals at the lowest cost and in compliance with, and support of, the IOUs' business plans,¹⁵ CPUC's EE decisions, and other filings.¹⁶

ETP's vision is to identify and bring commercially-available technologies promptly to the EE program portfolio by determining the latest emerging technology trends. It is important for ETP to be on the forefront of these trends because it allows ETP to identify, track, and vet the efficacy and claims of these technologies, products, and solutions through a variety of program tactics to:

- assess and confirm their potential energy savings and operational performance,
- help estimate long-term cost-effectiveness,
- recognize technologies with significant energy savings opportunities, and
- identify potential barriers to market adoption.¹⁷

ETP supports the EE program portfolio and Codes & Standards in their need to offer new EE measures to customers by:

- Providing a comprehensive set of suitable technology options for new EE measures.

¹⁵ SCE's Amended Application (A.) of its EE Rolling Portfolio Business Plan for 2018-2025 (A.17-01-013) filed on February 10, 2017; SDG&E's Application to Adopt Energy Efficiency Rolling Portfolio Business Plan Pursuant to Decision 16-08-019 (A.17-01-014) filed on January 17, 2017; and PG&E's Application for Approval of 2018-2025 Rolling Portfolio Energy Efficiency Business Plan and Budget (A.17-01-015) filed on January 17, 2017. Offers may consider the strategies described in the business plans but are not limited to those strategies.

¹⁶ See Appendix B for a list of Decisions and applicable links.

¹⁷ Decision 12-05-015, OP 97, p. 419 "Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and Southern California Gas Company shall utilize enhanced market behavioral research to address customer and end-users' acceptance and adoption of new technologies, in particular for technologies that are being considered for transfer into the energy efficiency portfolio."

- Providing actionable market information to inform program delivery.
- Conducting outreach to disseminate new technology assessment and demonstration findings and information.

b. Objectives

The objective of this solicitation is to seek programs and to execute contracts with selected bidders for innovative management and evaluation of emerging technologies. A successful ETP Offer contains innovative design approaches, cost-efficient implementation, and supports the timely introduction of new energy efficiency emerging technologies by performing the following activities:

- Identify, screen, assess, demonstrate, showcase, and pilot emerging, underutilized, commercially-available electric EE emerging technologies, products, and services as appropriate for inclusion in the California IOUs' EE program portfolios and code adoption^{18, 19} (in coordination with the Codes and Standards program).
- Provide information about program portfolio EE measure needs to technology, product and service developers, manufacturers, technology development actors, and other stakeholders that engage in the California technology development pipeline so they may tailor their offerings accordingly.²⁰
- Identify the non-energy benefits of emerging and underutilized energy-saving technologies, products and services to help utility customers better understand the value proposition of the product, thus stimulating their adoption.

1.2 Timing

Key milestones associated with the solicitation are shown in Table 1.1.

¹⁸ Decision 12-05-015 OP 99 – “Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and Southern California Gas Company shall coordinate with the Codes and Standards program and the California Energy Commission’s Codes and Standards programs to (a) support the advancement of emerging technologies and approaches, including demonstration of technologies, that are candidates for adoption into future codes and standards as well as Reach Codes, and (b) identify critical early planning workforce training needs for advanced technologies.”

¹⁹ Decision 12-05-015 OP 91 - “In the Codes and Standards program implementation plan sections of their 2013-2014 applications, Pacific Gas and Electric Company, Southern California Edison Company, San Diego Gas & Electric Company, and Southern California Gas Company shall include a detailed description for the statewide “Planning and Coordination Subprogram” that implement the “integrated dynamic approach.” The program implementation plan should include an outline of the relevant roles of each of the Codes and Standards sub-programs relative to other IOUs programs and non-IOUs initiatives, as well as program objectives, strategies, expected outcomes, and program budgets.”

²⁰ Decision 12-05-015 p. 270: “The Emerging Technologies Program is well suited to take on a leadership role to bring all market actors together in order to increase coordination and to leverage the R&D opportunities, funds, and collaborative prospects.”

Table 1.1: Key Milestones	
Milestones	Completion Date
RFA Stage	
Solicitation Launch	August 4, 2020
Bidders' Conference	August 11, 2020
Offer Submittal Deadline	September 9, 2020
RFA Shortlist to PRG	October 9 – 20, 2020
Shortlisting Notification	October 27, 2020
RFP Stage	
Solicitation Launch	January 5, 2021
Bidders' Conference	January 14, 2021
Offer Submittal Deadline	February 24, 2021 ²¹
RFP Shortlist to PRG	April 2021 PRG Meeting
Shortlisting Notification	April 27, 2021
Contracting Stage	
Contracting and Negotiations Period	April 28, 2021 – July 26, 2021
Contracts Presented to PRG	August 11 - 17, 2021
Contract Execution	September 8, 2021

1.3 Key Observations

Table 1.2 represents a collection of key IE issues, observations, and outcomes, where applicable, from the assigned IE for the Statewide EETP solicitation.

²¹ Originally, the proposals from bidders were expected to be received on February 18, 2021. However, given the extreme weather conditions in parts of the country during that week, one bidder requested an extension. SCE granted a six-day extension and five proposals were received on February 24, 2021. The IE believes that this was a reasonable request and response by SCE.

Table 1.2: Key Issues and Observations

Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)

Table 1.2: Key Issues and Observations			
Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)

2. RFA Bidder Response and Selections

2.1 RFA Development

The solicitation design adequately met the program portfolio needs as presented in the IOU-approved Business Plan, [REDACTED], and applicable portfolio metrics. The solicitation was conducted in accordance with CPUC requirements as a two-stage process, with robust IE engagement and regular coordination with the PRG on all aspects of the solicitation. This was detailed in the April 2020 through September 2020 Semi-Annual Report.

2.2 RFA Outreach

SCE’s outreach through traditional methods (e.g., website, CAEECC, etc.) resulted in a robust and competitive solicitation with robust participation in the Bidders’ Conference and an appropriate number of responses to the RFA as shown below. This was detailed in the April 2020 through September 2020 Semi-Annual Report.

2.3 RFA Bidders' Conference

The Bidders' Conference was held on Tuesday, August 11, 2020 via Skype with more than 200 potential bidders in (virtual) attendance and was reported in the previous Semi-Annual Report April 2020 through September 2020. Table 1.3 below shows the stats of the RFA response.

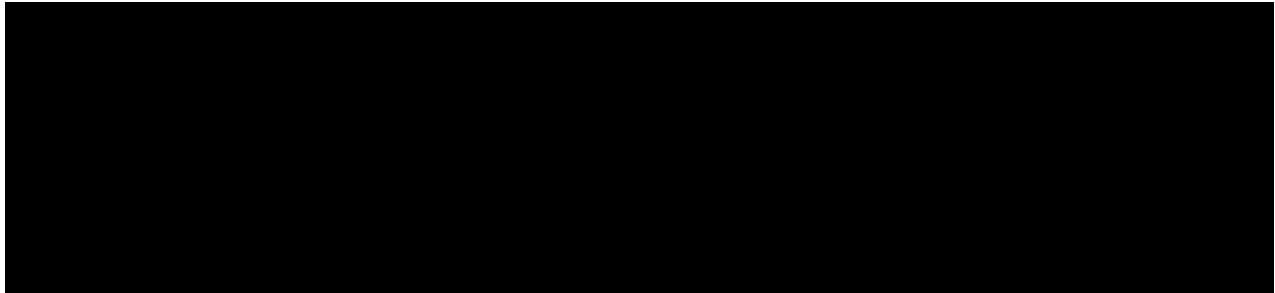
Table 2.1: Bidders' Conferences	
RFP Bidder Conference Date	August 11, 2020
No. of Attendees (via Skype)	200+
No. of Questions and Answers (Q&A) Received	40+

2.4 RFA Bidders' Response

Table 2.2: Solicitation Abstract Response	
	No.
Abstracts Expected	
Abstracts Received	
Abstracts Disqualified	
Abstracts Shortlisted	

2.5 Abstract Selection Process

a. Bid Screening Process and Management of Deficient Bids



The team continued through the calibration process with the [redacted] [redacted] proposed to proceed to the RFP stage.

b. Evaluation Team Profile

The evaluation team profile was reported on in the last Semi-Annual Report April 2020 through September 2020, but the roster is included below as a reference.

Table 2.3: IOU Evaluation Team		
Position Title	Position Role	Area Scored
[Redacted]		

c. Scoring Rubric Design

The scoring rubric design was also included in the previous Semi-Annual Report (April 2020 through September 2020), but we have included it below as a reference.

Table 2.4: Scoring Rubric	
[Redacted]	

d. Evaluation Processes and Scoring Calibration

The calibration process was conducted in a fair and transparent manner. [Redacted]

[Redacted]

e. Abstract Selections



2.6 PRG and IE Feedback to Abstract Process and Selections

a. Adherence to PRG Guidance and Feedback

The process followed PRG Guidance and SCE worked closely with and responded to PRG feedback, particularly from the Energy Division subject matter expert (SME).

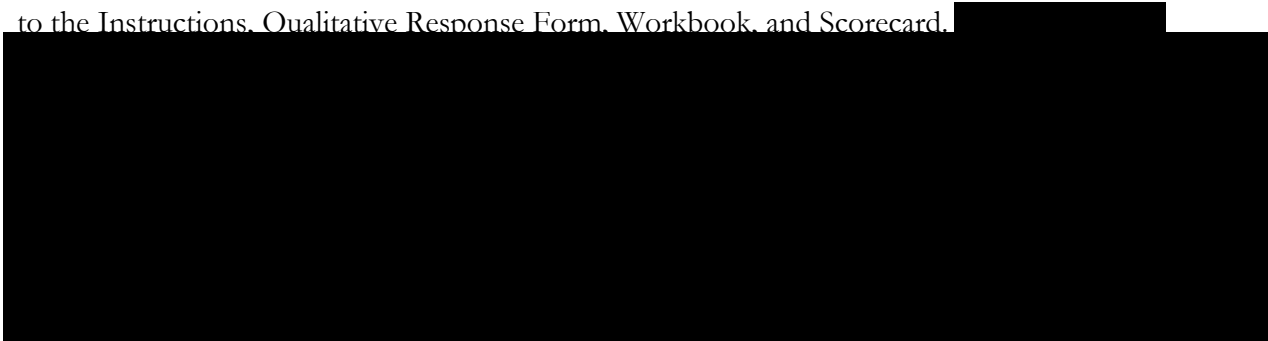
b. Response to IE Feedback

SCE accepted all IE feedback and recommendations related to abstract selection.

3. RFP Bidder Response and Selections

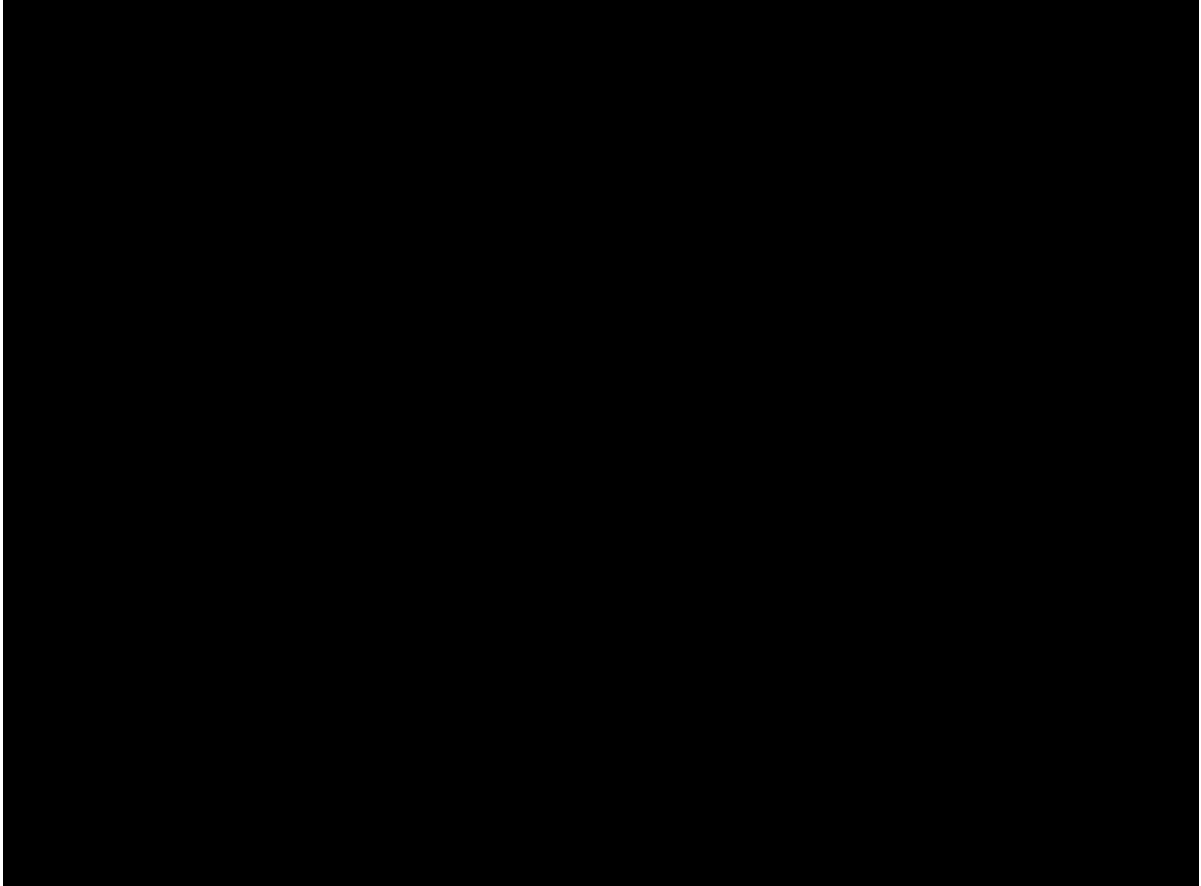
3.1 RFP Development

During the November/December 2020 timeframe, the IE reviewed the RFP materials and provided feedback to the SCE team. The majority of our feedback was accepted by the SCE team as it relates to the Instructions, Qualitative Response Form, Workbook, and Scorecard.



The IE also reviewed feedback from the Energy Division SME prior to the December PRG meeting and feedback from the other PRG members following the PRG meeting and shared this with SCE.

Prior to release of the RFP, SCE responded to PRG comments and feedback and made some modification to the materials, which included the following themes:



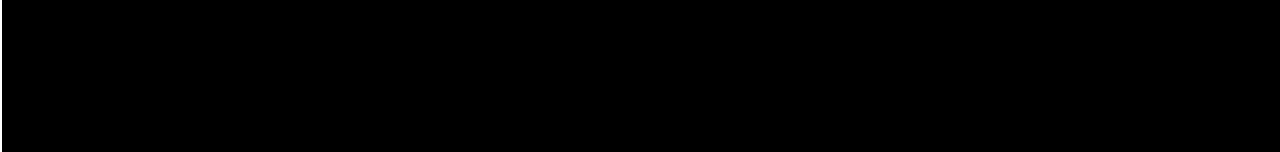
3.2 RFP Bidders' Conference

SCE held the Bidders' Conference on January 14, 2021 via Microsoft Teams (MS Teams or Teams) "Live". There were 44 attendees, including 32 bidder representatives for the six bidders advanced to the RFP stage. Following SCE's presentation, bidders asked 57 questions with themes including **clarification of terminology, DBE requirements, staffing, metrics, compensation, scoring/valuation, coordination with Codes & Standards and Market Transformation, and logistical clarifications about forms/formats/fonts/character limits.**

The bidders were very engaged and the Teams live option allowed bidders to ask questions anonymously, which ensures that bidders do not know who else has been advanced to the RFP stage. The SCE team used a separate MS Teams forum to collaborate on responses to questions in real time. SCE was able to respond to 31 of the 57 of the questions during the meeting and responded to and published the remaining answers to questions by Tuesday, January 19th.

3.2 RFP Bidders' Response

Table 3.1: Solicitation RFP Response	
	No.
Proposals Expected	6
Proposals Received	5
Proposals Disqualified	0



3.3 Proposal Selection Process

a. Bid Screening Process and Management of Deficient Bids



b. Scoring Rubric Design

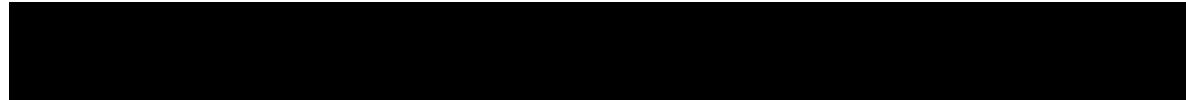


Table 3.2: Scoring Rubric		
Category	Sub-Category	Weighting
[Redacted]		

c. Evaluation Team Profile



d. Evaluation Processes and Scoring Calibration



e. Shortlist and Final Selections

To be provided in the next Semi-Annual Report

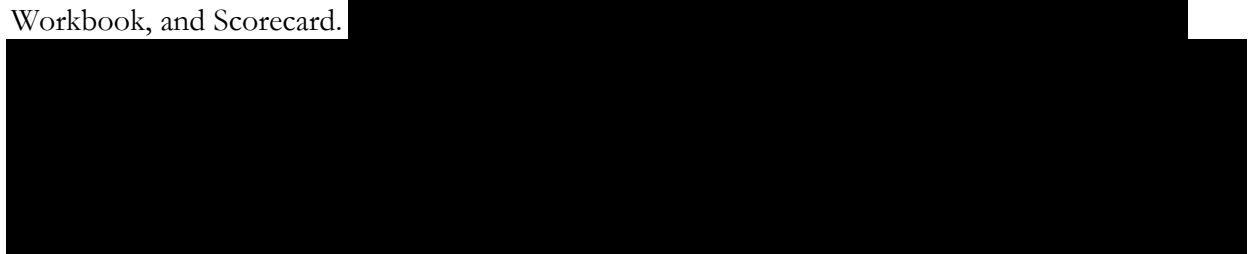
3.4 PRG and IE Feedback to Proposal Process and Selections

a. Adherence to PRG Guidance and Feedback

For the RFP process, SCE followed the PRG Guidelines, except in the case of the PRG guidance and the IE recommendation to not ask bidders for redlines to contracts at the RFP stage.

b. Response to IE Feedback

In the IE’s review of the RFP materials and providing feedback to the SCE team, the majority of IE feedback was accepted by the SCE team as it relates to the Instructions, Qualitative Response Form, Workbook, and Scorecard.



4. Contracting Process

To be provided in the next Semi-Annual Report.

5. Assessment of Final Contract

To be provided in the next Semi-Annual Report.

6. Overall Assessment of Solicitation

To be provided in the next Semi-Annual Report.

7. Implementation Plan Assessment

To be provided in the next Semi-Annual Report.

Energy Efficiency Independent Evaluator's Semi-Annual Report on the

Local Agricultural Sector Solicitation

Reporting Period: October 2020 through March 2021

Prepared by:
Don Arambula Consulting



Disclaimer: This report includes sensitive and confidential information.

Local Agricultural Sector

1. Solicitation Overview

This Report on the Local Agricultural sector solicitation covers the period from October 2020 through March 2021. As a result, much of the Report addresses the RFA stage of SCE's program solicitation.

1.1 Overview

The Local Agricultural sector solicitation seeks innovative resource programs that can serve SCE's Agricultural sector customers' EE needs, that are designed, proposed, and implemented by Offeror²² in SCE's service territory, and that comply with the CPUC-established energy efficiency policies within this solicitation's requirements.

a. Scope

The total budget for this solicitation is up to \$3 million per program year, beginning no earlier than December 2021 and ending no later than December 31, 2025. Additional funding is available depending on the competitiveness of the offers received. SCE may elect to split this budget across multiple offers and/or award the same customer segments or geographical regions to multiple Offerors; there is no exclusivity guaranteed. In addition, Offerors may propose EE and Demand Response (DR) integration strategies consistent with CPUC policies.²³ If interested in pursuing funds specifically available to EE/DR integration strategies,²⁴ bidders are allowed to include such strategies.

b. Objectives

The Local Agricultural sector solicitation prefers innovative offers that can provide near-term cost-effective energy savings that can be cost-efficiently delivered while addressing the customer sector objectives presented below:

- Offers with effective metric tracking and monitoring, such as embedded measurement and verification (EM&V).
- Offers that reduce or eliminate market barriers and reduce free-ridership through program strategies.
- Offers that increase program participation and maximize energy savings for customers

²² Decision 16-08-019, p. 67.

²³ Decision 18-05-041, OP 9.

²⁴ Id, OP 10.

defined by the CPUC as hard-to-reach (HTR), customers located in disadvantaged communities (DAC), and legislatively-defined Socially Disadvantaged Farmers (Assembly Bill 1348) where applicable.

- Offers that enhance and improve the customer experience from existing SCE offerings and improve customer satisfaction (e.g., ease of participation, technical support, level of service provided, value add of the program, etc.).
- Offers that promote integrated EE and DR technologies and integrated demand-side management solutions.

1.2 Timing

The Local Agricultural sector program solicitation was delayed from 2019 until late 2021. SCE delayed the solicitation to focus on other local and statewide solicitations. The table below presents a list of key solicitation milestones and estimated completion dates. Unless otherwise noted, all milestone dates as of this Report were met or are on schedule.

Table 1.1: Key Milestones	
Milestones	Completion Date
RFA	
RFA Launch	November 5, 2020
Bidders' Conference	November 12, 2020
Deadline to Submit Written Questions Prior to the Offer Submittal Deadline	November 24, 2020
IOU Response to Offeror Questions	December 3, 2020
Offer Submittal Deadline	December 10, 2020
Shortlist Notification	February 4, 2021
RFP	
RFP Launch	April 1, 2021
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Deadline to Submit Written Questions Prior to the Offer Submittal Deadline	April 19, 2021
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CET Cure Period	May 2021
Shortlist Notification	June 2021
Contracting & Implementation	

Table 1.1: Key Milestones	
Milestones	Completion Date
Contract Negotiations	June 2021 – September 2021
Commercial Lockdown	September 2021
Final Price Refresh	October 2021
Contingent Selection Notification	November 2021
Tier 2 Advice Letter Submission, if Applicable	December 2021
Final Implementation Plan	Q1 2022*
Program Launch	Q2 2022
Tier 2 Advice Letter Submission, if Applicable	December 2021
* Final Implementation Plan is due 60 days after contract execution or CPUC approval of advice letter, if required.	

1.3 Key Observations

Table 1.2 lists the key observations made by the IE during the solicitation during this reporting period (October 2020 through March 2021). The IE shared these key recommendations and others with the IOU and the PRG throughout the reporting period. The IOU was provided an opportunity to review, consider, and accept the recommendations. The IOU did not always accept the IE recommendations. In those instances, the IOU provided its rationale for not accepting. In some cases, the IOU may have not finalized its response to the recommendation.

Table 1.2: Key Issues and Observations			
Topics	Key Observations	IE Recommendations	Outcomes
RFA			
Conduct Bidder Survey to Gauge Effectiveness of Bidder Q&A Process	SCE employed an aspirational 48-hour response to each bidder question received. The IE notes it is admirable of the IOU to take this approach.	The IE encourages the IOU to survey bidders at the conclusion of this solicitation to gauge the usefulness to bidders of employing this near-real-time response to bidder questions. Based on bidder survey results, SCE may look to modify its approach to respond to all questions at one time.	Pending.

Table 1.2: Key Issues and Observations

Topics	Key Observations	IE Recommendations	Outcomes
[Redacted Content]			

Table 1.2: Key Issues and Observations

Topics	Key Observations	IE Recommendations	Outcomes
This row is intentionally blank with a black background			
Reduce Number of Bidder Questions and Simplify Abstract Format	In prior solicitations, SCE required bidders to respond to several questions using an MS Excel (Excel) workbook.	Transition away from an Excel-based narrative workbook to a word-based narrative template and limit the number of questions.	SCE has limited the number of bidder questions at the RFA stage and has transitioned to a word-based narrative format.

²⁵ Southern California Edison Company's *Comprehensive Solicitation Process Proposal* dated August 4, 2017

Table 1.2: Key Issues and Observations			
Topics	Key Observations	IE Recommendations	Outcomes
RFP			

Table 1.2: Key Issues and Observations			
Topics	Key Observations	IE Recommendations	Outcomes

2. RFA Bidder Response and Selection

2.1 RFA Development

The RFA requirements were adequate to provide SCE sufficient information on the bidders' proposals. The RFA requirements [REDACTED] regarding their program abstracts. This was a significant improvement over previous RFA solicitations where SCE had requested

²⁶ Energy Efficiency Policy Manual, Version 6.0, April 2020, Appendix C.

bidders respond to several more questions. [REDACTED] helped SCE more efficiently review abstracts while clearly identifying the preferred program designs. The IE notes the RFA questions could be further refined and reduced without impacting the quality of submission or the evaluation process.

SCE also migrated from an Excel-based workbook to a Word-based narrative form to capture bidder responses. This was a significant improvement over past solicitations and should be considered an effective practice for future solicitations.

2.2 RFA Outreach

The solicitation outreach relied on a general awareness of SCE's program solicitations to the bidder community through several announcements and IOU-specific workshops regarding SCE's upcoming EE program solicitations. SCE also posted general information onto its third-party solicitation webpage and the CAEECC website.

2.3 RFA Bidders' Conference

SCE held a RFA Bidders' Conference on November 12, 2021. Potential bidders had ample time during both conferences to ask questions. Bidders were also provided an opportunity after the Bidders' Conference to provide written questions. In response, SCE received a total of 22 questions related to the Agricultural solicitation from potential bidders. Questions received covered various topics such as: the eligibility of cannabis crops, post-harvest processing, lighting, and water pumping measures; treatment of performance assurances; payment timing; SCE's commitment to DBE in light of the IOU's proposed payment structure; eligibility of building retrofits considering new statewide new construction scope; and availability of SCE's agricultural customer representatives.

As part of the bidder Q&A, [REDACTED]

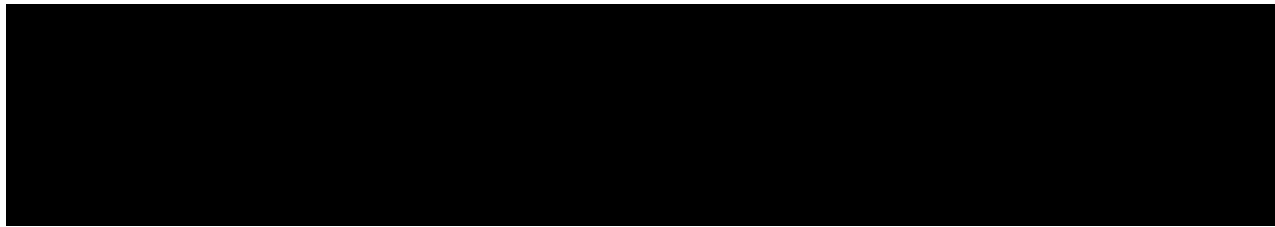


SCE responded to all bidder questions by December 3, 2020. SCE employed an aspirational 48-hour response to each bidder question received. The IE notes SCE's admirable attempt to respond fully and completely within a 48-hour period to each question. The IE encourages the IOU to survey bidders at the conclusion of this solicitation to gauge the usefulness to bidders of employing this near-real-time response to bidder questions. Based on bidder survey results, SCE may look to modify its approach to respond to all questions at one time.

2.4 RFA Bidders' Response

Overall, the solicitation outreach was adequate, as it ultimately generated [REDACTED] to the RFA. The table below summarizes SCE's actual response to the local program solicitation.

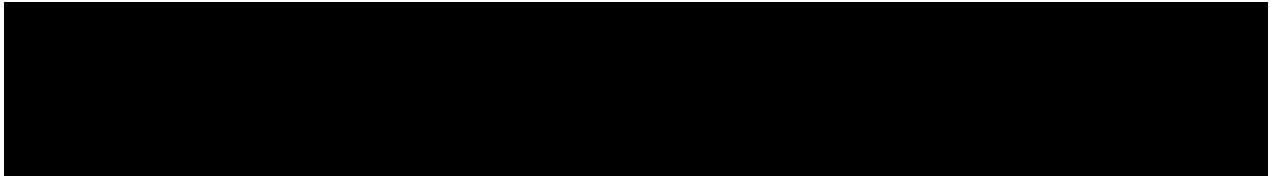
Table 2.1: Solicitation Abstract Response	
	Number
Abstracts Expected	[REDACTED]
Abstracts Received	[REDACTED]
Abstracts Disqualified	[REDACTED]
Abstracts Shortlisted	[REDACTED]



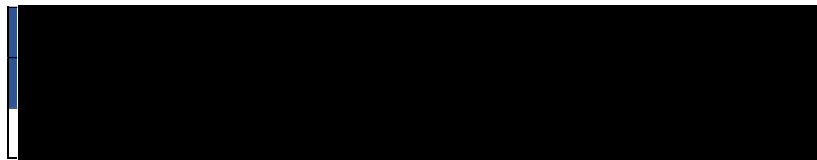
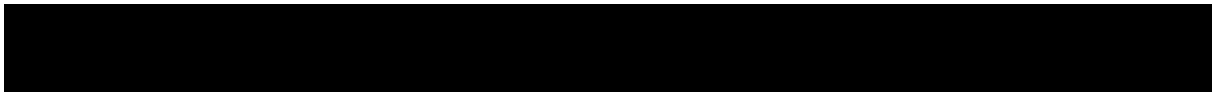
2.5 Abstract Selection Process

The abstract selection process includes the development of a qualified evaluation team, a scoring rubric, a bid screening process, and an evaluation process. The following discusses each of these aspects of the solicitation at the RFA stage.

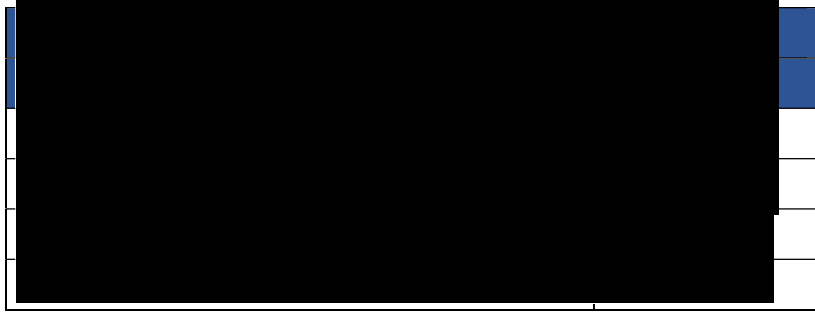
a. Bid Screening Process and Management of Deficient Bids



b. Scoring Rubric Design



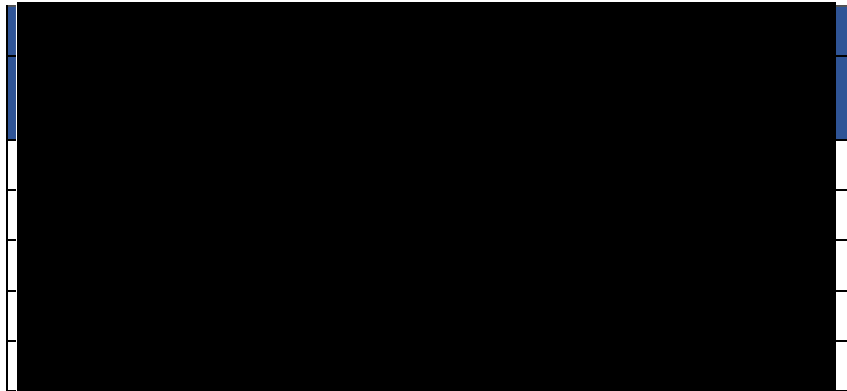
²⁷ 2020 Local Agricultural Sector Request for Abstracts, Participant Instructions, Section 3.08.



c. Evaluation Team Profile

The SCE evaluation team consisted of [REDACTED] from various program-related disciplines. Each evaluator reviewed and scored all abstract categories presented in Table 2.3. There were no identified conflicts of interest among the team members or the participating bidders.

[REDACTED]

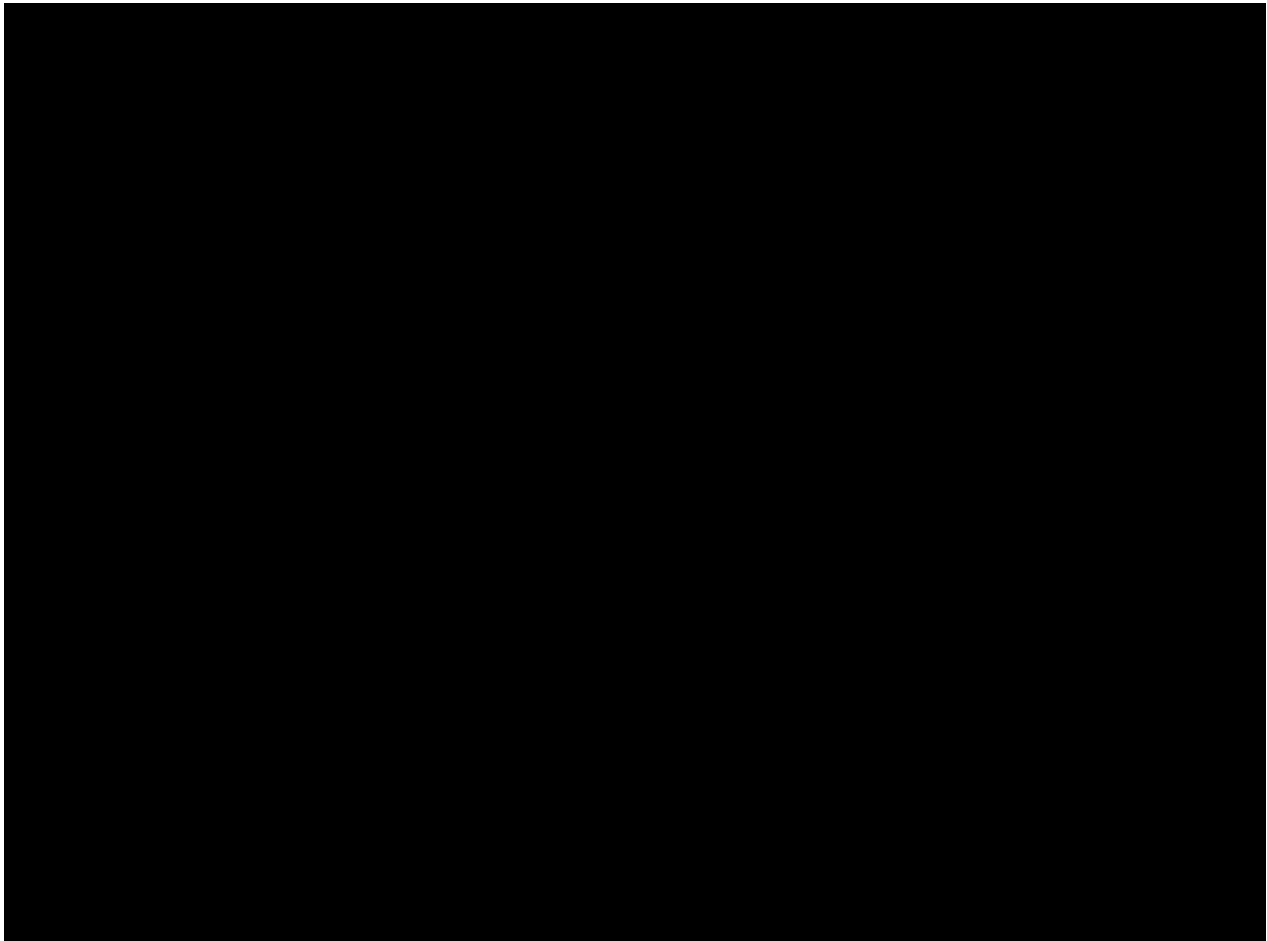


d. Evaluation Processes and Scoring Calibration

[REDACTED]

[REDACTED] The IE actively monitored all discussions. [REDACTED]

[REDACTED]



e. Shortlist and Final Selections

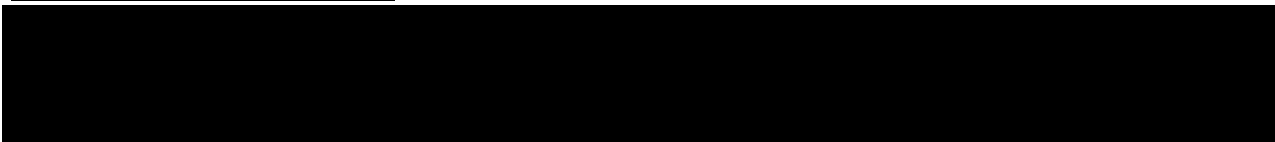
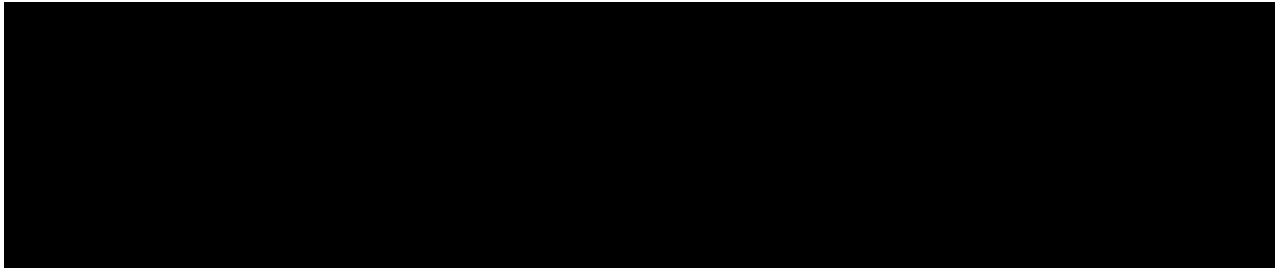
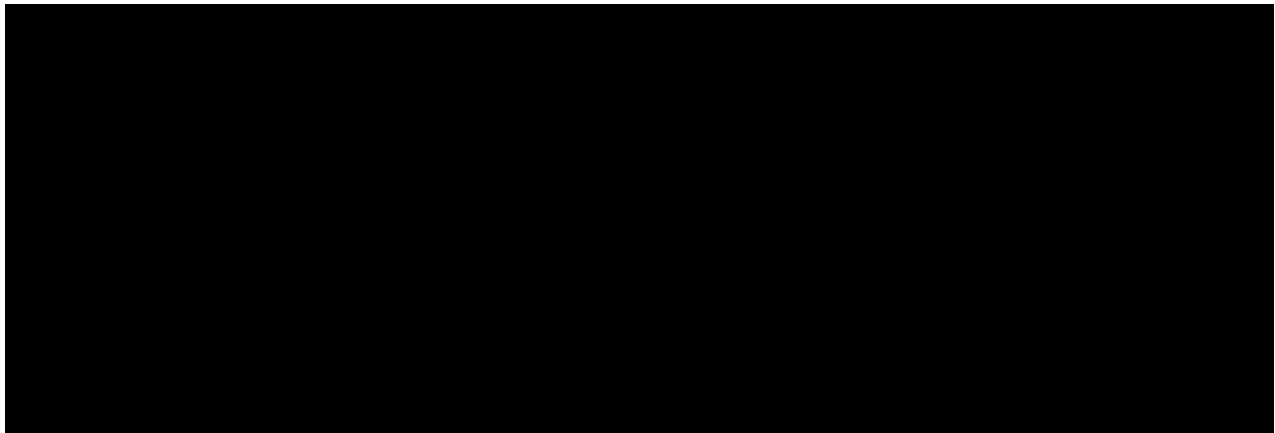
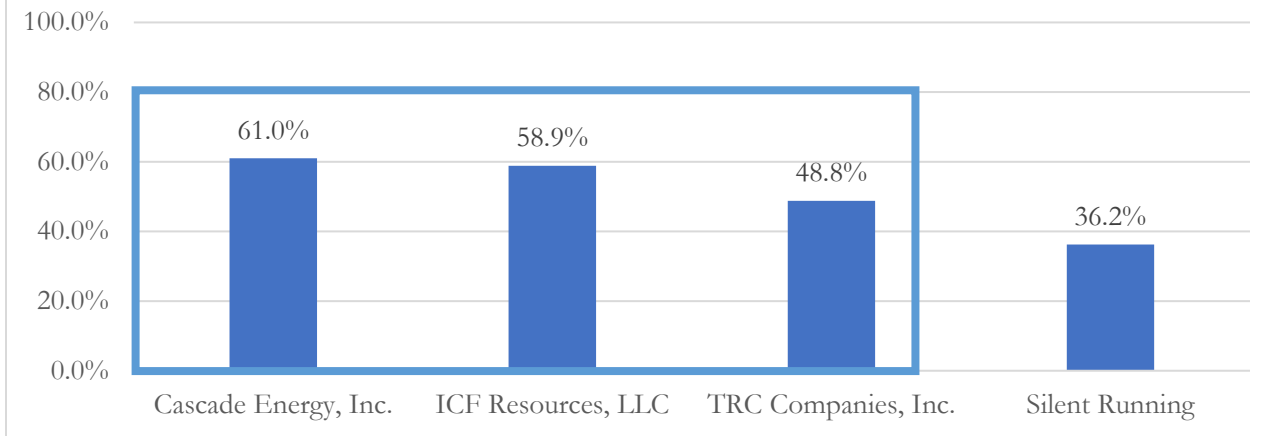


Figure 1: Agricultural Sector - IOU Post-Calibration Scores



[Redacted Content]		61.0%
		58.9%
		48.8%
		36.2%

2.6 PRG and IE Feedback to Abstract Process and Selections

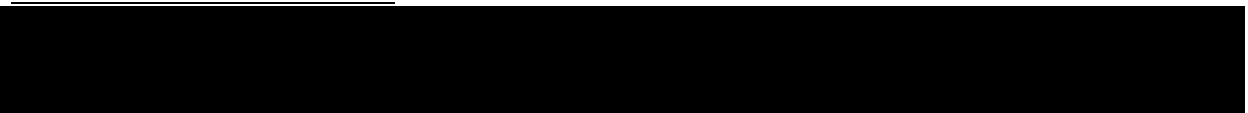
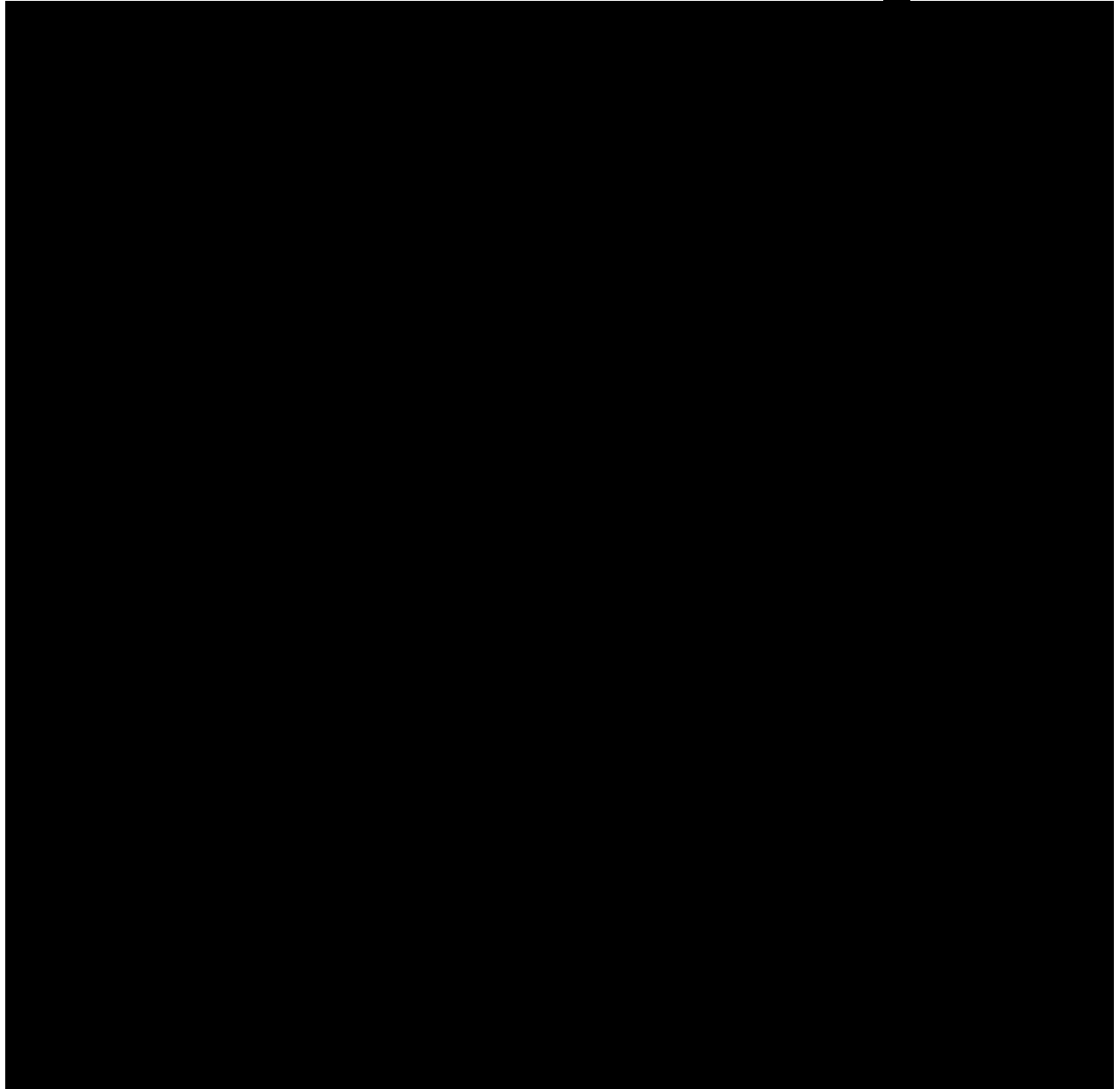
SCE provided the opportunity for both the PRG and the IE to review and comment on the RFA materials. SCE was also provided with the PRG Guidance document and a list of PRG recommended guidelines (aka, the PRG RFA Checklist). The IOUs response to the PRG and the IE feedback is discussed below.

a. Adherence to PRG Guidance

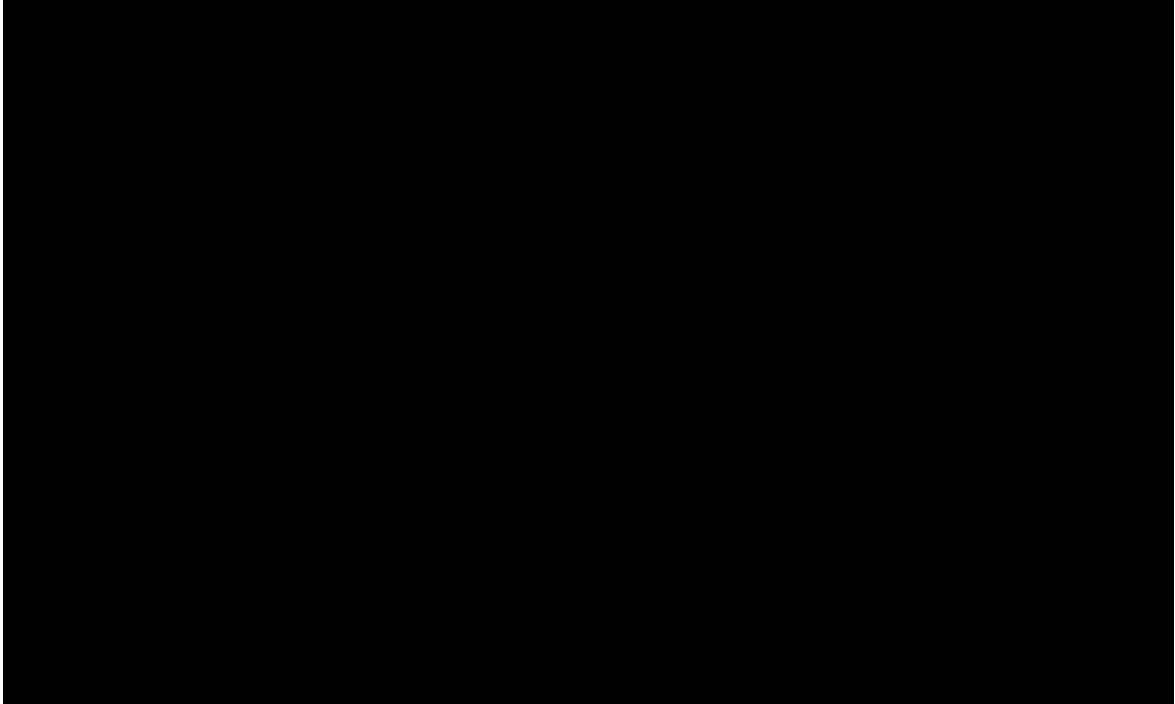
The RFA conformed to the PRG Guidance document.

b. Response to IE Feedback

For greater efficiency, the IE reviewed SCE’s Local Agricultural sector RFA along with its Local Public sector RFA which shares the same solicitation schedule. The IE provided [REDACTED]



The IE notes that the IOU did accept a number of significant recommendations including:

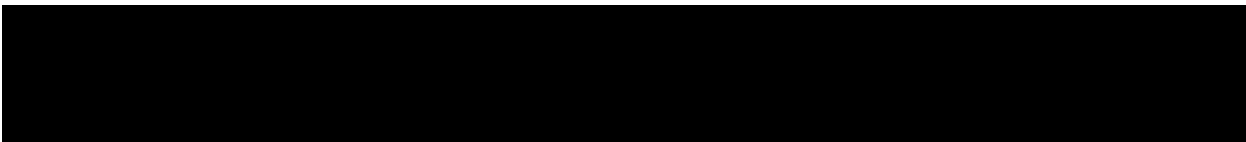


3. RFP Bidder Response and Selections

3.1 RFP Development

The RFP requirements were adequate to provide SCE sufficient information on the bidders' proposals. As discussed in Section 3.4, the IE had several recommendations on improving the RFP materials.

The RFP included SCE's proposed EE Agreement which represents the IOU's proposed additions to the CPUC modifiable terms and conditions. The IE supports the inclusion of SCE's proposed EE Agreement as it allows bidders an opportunity to prepare for potential contract negotiations.



3.2 RFP Bidders' Conference

This solicitation activity has not yet occurred; future Semi-Annual Reports will address this topic.

3.3 Proposal Selection Process

This solicitation activity has not yet occurred; future Semi-Annual Reports will address this topic.

3.4 PRG and IE Feedback to Proposal Process and Selections

SCE provided the opportunity for both the PRG and the IE to review and comment on the RFP materials. SCE was also provided with the PRG Guidance document and a list of PRG recommended guidelines (a.k.a., the PRG RFP Checklist). The IOUs response to the PRG and the IE feedback is discussed below. The RFP selections are pending as of this reporting period. The following section will be updated with PRG and IE feedback on the selection process in the next semiannual report.

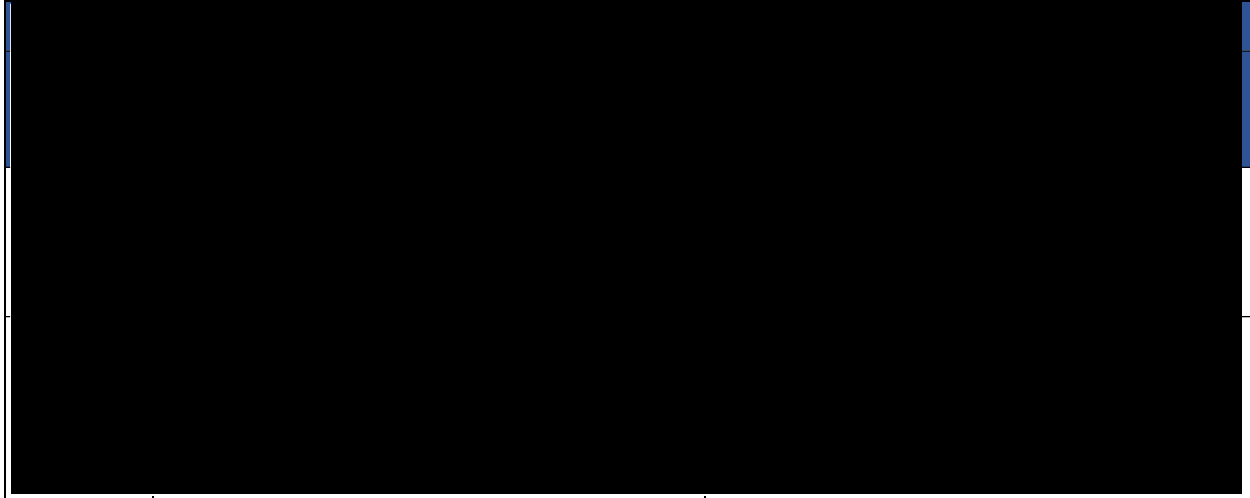
a. Adherence to PRG Guidance

The IE confirmed that the draft RFP conformed to all but

[REDACTED]

[REDACTED]

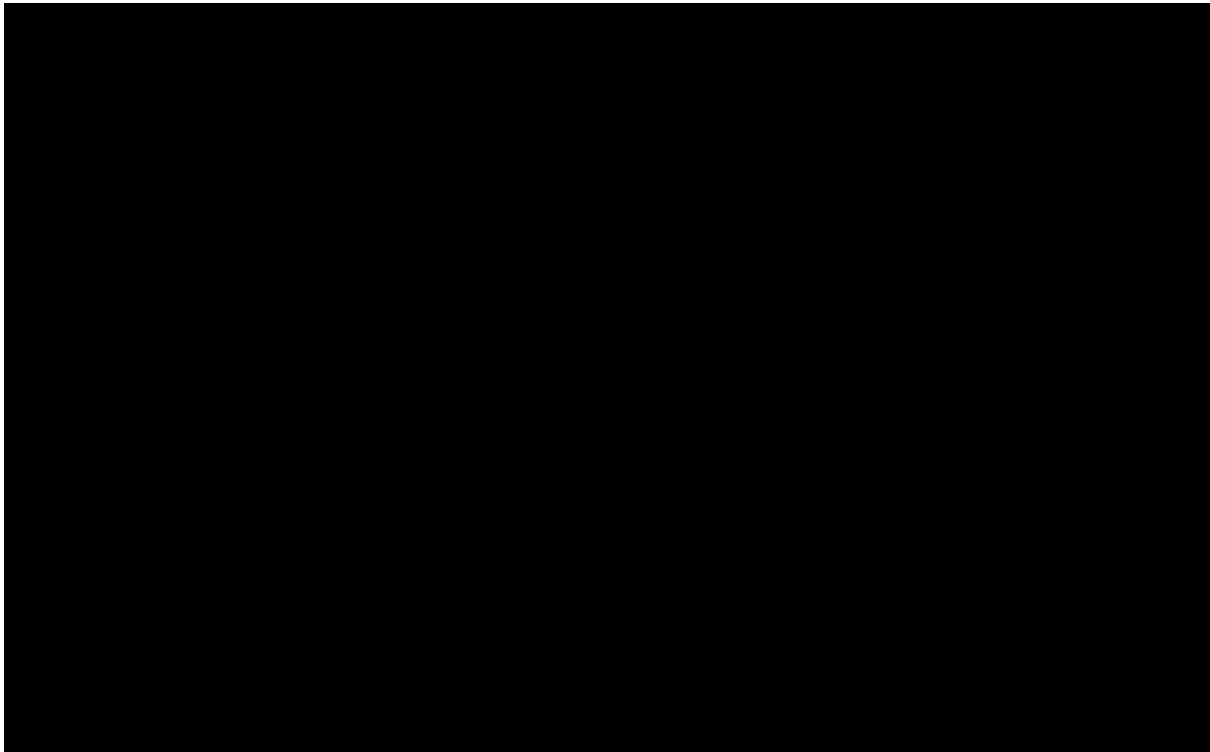
³¹ PRG Solicitation Guidelines, Version 1.0, August 2020.



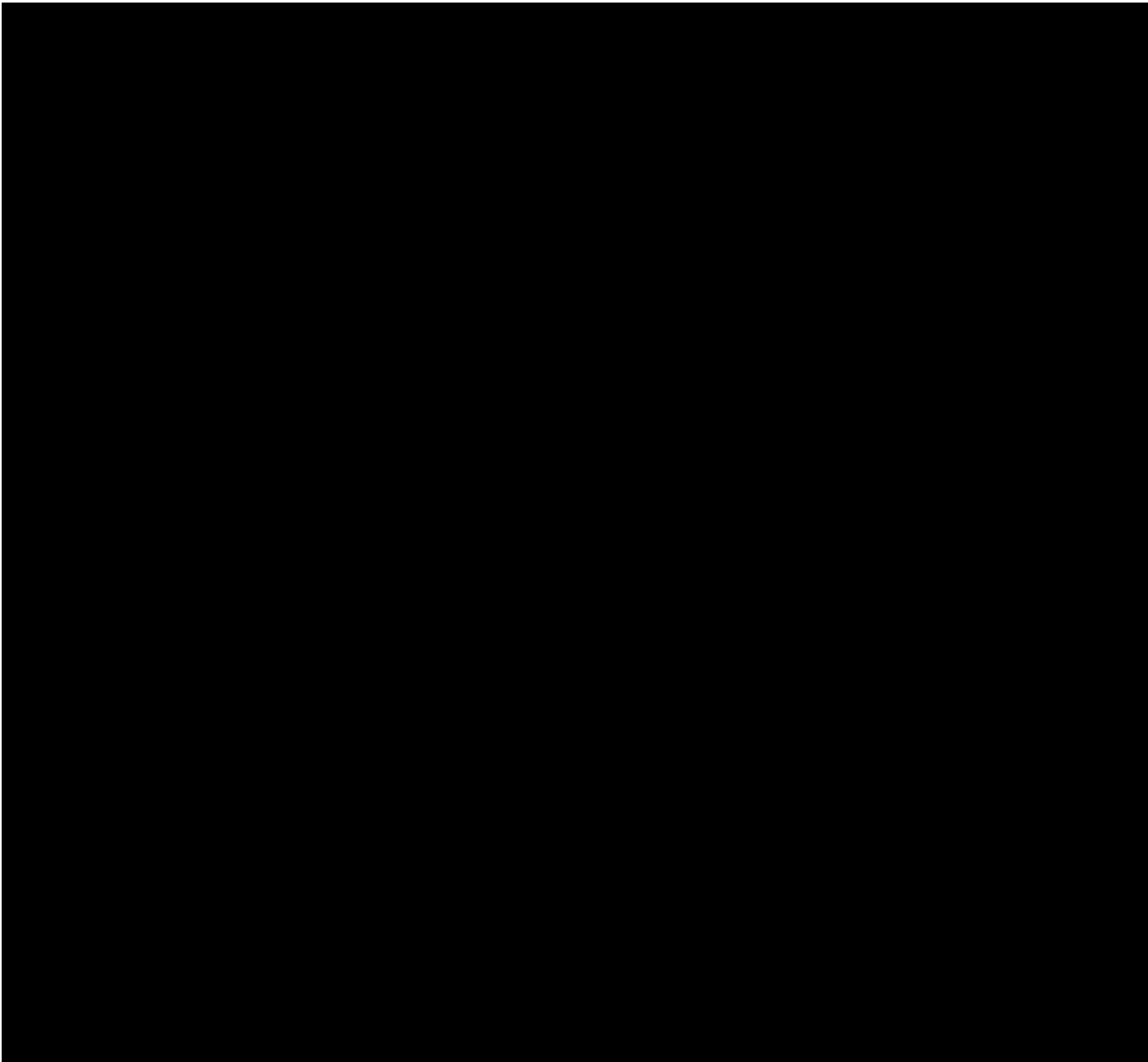
b. Response to IE Feedback

For greater efficiency, the IE reviewed SCE’s Local Public Sector RFP along with its Local Agricultural Sector RFP. The IE provided [REDACTED] to SCE on the Public Sector RFP material including the corresponding scoring rubric. There were [REDACTED] that the IOU considered but ultimately did not accept. Below is a summary of key recommendations considered by the IOU but not accepted:

RFP Instructions



³² Energy Efficiency Policy Manual, Version 6.0, April 2020, Appendix C.



4. Contracting Process

This solicitation activity has not yet occurred; future Semi-Annual Reports will address this topic.

5. Assessment of Final Contract

This solicitation activity has not yet occurred; future Semi-Annual Reports will address this topic.

6. Overall Assessment of Solicitation

This solicitation activity has not yet occurred; future Semi-Annual Reports will address this topic.

7. Implementation Plan Assessment

This solicitation activity has not yet occurred; future Semi-Annual Reports will address this topic.

Energy Efficiency Independent Evaluator's Semi-Annual Report on the

Local Public Sector Solicitation

Reporting Period: October 2020 through March 2021

Prepared by:
Don Arambula Consulting



Disclaimer: This report includes sensitive and confidential information.

Local Public Sector

1. Solicitation Overview

This Report on the Local Public sector solicitation covers the period from October 2020 through March 2021. As a result, much of the Report addresses the RFA stage of the SCE's program solicitation.

1.1 Overview

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a. Scope

The total budget for this solicitation is up to \$7 million per program year, beginning no earlier than December 2021 and ending no later than December 31, 2025. Additional funding is available depending on the competitiveness of the offers received. SCE may elect to split this budget across multiple offers and/or award the same customer segments or geographical regions to multiple Offerors; there is no exclusivity guaranteed. In addition, Offerors may propose EE and DR integration strategies consistent with CPUC policies.³⁴ If interested in pursuing funds specifically available to EE/DR integration strategies,³⁵ bidders are allowed to include such strategies.

b. Objectives

The Local Public sector solicitation prefers innovative Offers that can provide near-term cost-effective energy savings that can be cost-efficiently delivered while addressing the Customer Sector Objectives presented below:

- Offers with effective metric tracking and monitoring, such as EM&V.
- Offers that reduce or eliminate Market Barriers and reduce Free-ridership through program strategies.
- Offers that increase program participation and maximize energy savings for customers defined as HTR, customers located in DAC, where applicable.

³³ Decision 16-08-019, p. 67.

³⁴ Decision 18-05-041, OP 9.

³⁵ Id, OP 10.

- Offers that enhance and improve the customer experience from existing SCE offerings and improve customer satisfaction (e.g., ease of participation, technical support, level of service provided, value add of the program, etc.).
- Offers that promote integrated EE and DR technologies and integrated demand-side management solutions.

1.2 Timing

The Local Public sector program solicitation was delayed from 2019 until late 2021. SCE delayed the solicitation to focus on other local and statewide solicitations. The table below presents a list of key solicitation milestones and estimated completion dates. Unless otherwise noted, all milestone dates as of this Report were met or are on schedule.

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* Final Implementation Plan is due 60 days after contract execution or CPUC approval of advice letter, if required.	

1.3 Key Observations

Table 1.2 lists the key observations made by the IE during the solicitation during this reporting period (October 2020 through March 2021). The IE shared these key recommendations and others with the IOU and the PRG throughout the reporting period. The IOU was provided an opportunity to review, consider and accept the recommendations. The IOU did not always accept the IE recommendations. In those instances, the IOU provided its rationale for not accepting. In some cases, the IOU may have not finalized its response to the recommendation.

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Table 1.2: Key Issues and Observations

Topics	Key Observations	IE Recommendations	Outcomes
[Redacted Content]			

Table 1.2: Key Issues and Observations

Topics	Key Observations	IE Recommendations	Outcomes
Reduce Number of Bidder Questions and Simplify Abstract Format	In prior solicitations, SCE required bidders to respond to several questions using an excel workbook.	Transition away from an Excel-based narrative workbook to a Word-based narrative template and limit the number of questions.	SCE has limited the number of bidder questions at the RFA stage and has transitioned to a Word-based narrative format.

³⁶ *Southern California Edison Company's Comprehensive Solicitation Process Proposal* dated August 4, 2017.

Table 1.2: Key Issues and Observations

Topics	Key Observations	IE Recommendations	Outcomes
RFP			

Table 1.2: Key Issues and Observations			
Topics	Key Observations	IE Recommendations	Outcomes

³⁷ Energy Efficiency Policy Manual, Version 6.0, April 2020, Appendix C.

Table 1.2: Key Issues and Observations			
Topics	Key Observations	IE Recommendations	Outcomes

2. RFA Bidder Response and Selection

2.1 RFA Development

The RFA requirements were adequate to provide SCE sufficient information on the bidders’ proposals. The RFA requirements limited bidders to [REDACTED] regarding their program abstracts. This was a significant improvement over previous RFA solicitations where SCE had requested bidders respond to several more questions. The [REDACTED] helped SCE more efficiently review abstracts while clearly identifying the preferred program designs. The IE notes the RFA questions could be further refined and reduced without impacting the quality of submission or the evaluation process.

SCE also migrated from an Excel-based workbook to a Word-based narrative form to capture bidder responses. This was a significant improvement over past solicitations and should be considered an effective practice for future solicitations.

2.2 RFA Outreach

The solicitation outreach relied on a general awareness of SCE’s program solicitations to the bidder community through several announcements and IOU-specific workshops regarding SCE’s

³⁸ Decision 19-08-006, Section 3.3 Pay for Performance, pp. 9-12.

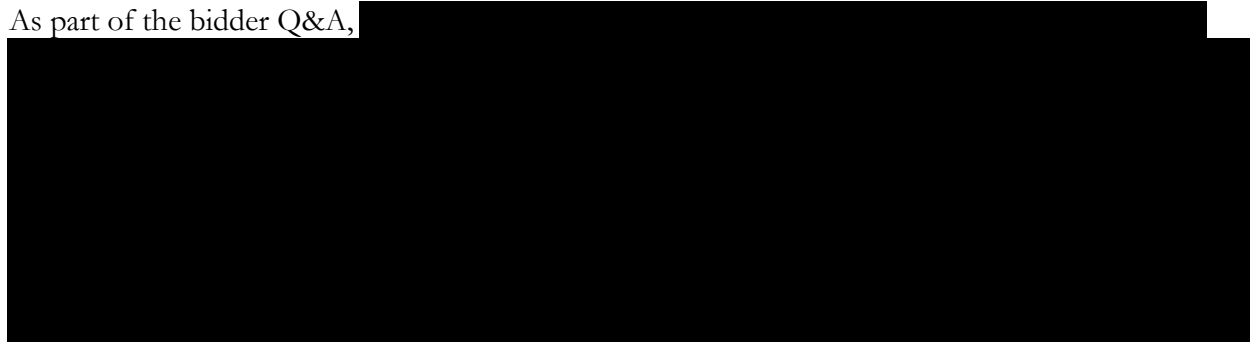
³⁹ Id, COL 6, p. 19.

upcoming EE program solicitations. SCE also posted general information onto its third-party solicitation webpage and the CAEECC website.

2.3 RFA Bidders' Conference

SCE held a RFA Bidders' Conference on November 12, 2020. Potential bidders had ample time during both conferences to ask questions. Bidders were also provided an opportunity after the Bidders' Conference to provide written questions. In response, SCE received a total of 19 questions related to the Public solicitation from potential bidders. Questions received covered various topics such as: eligibility of residential offerings; location of SCE ZIP code listings; pay-for-performance requirements; definition of HTR; preference for supplier diversity; and various administrative questions.

As part of the bidder Q&A,



SCE responded to all bidder questions by December 3, 2020. SCE employed an aspirational 48-hour response to each bidder question received. The IE notes SCE's admirable attempt to respond fully and completely within a 48-hour period to each question. The IE encourages the IOU to survey bidders at the conclusion of this solicitation to gauge the usefulness to bidders of employing this near-real-time response to bidder questions. Based on bidder survey results, SCE may look to modify its approach to respond to all questions at one time.

2.4 RFA Bidders' Response

Overall, the solicitation outreach was adequate, as it ultimately generated nine responses to the RFA. The table below summarizes SCE's actual response to the local program solicitation.

Table 2.1: Solicitation Abstract Response			
Abstracts Expected			
Abstracts Received			
Abstracts Disqualified			
Abstracts Shortlisted			



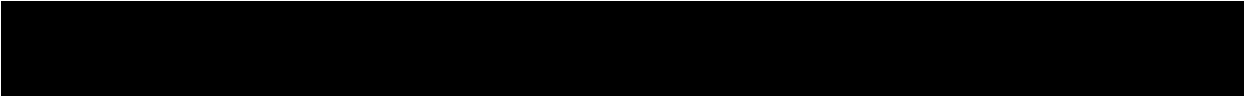
2.5 Abstract Selection Process



a. Bid Screening Process and Management of Deficient Bids

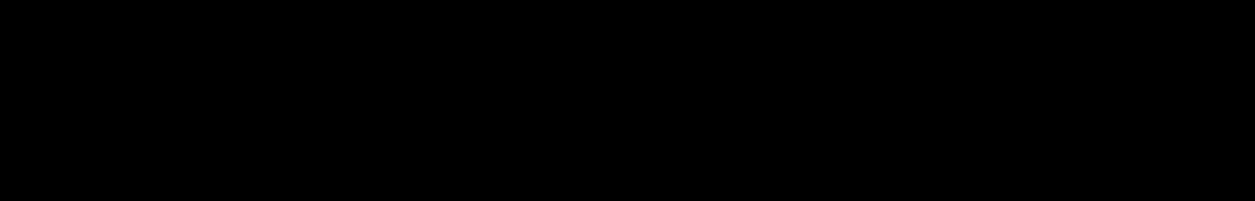



b. Scoring Rubric Design



c. Evaluation Team Profile

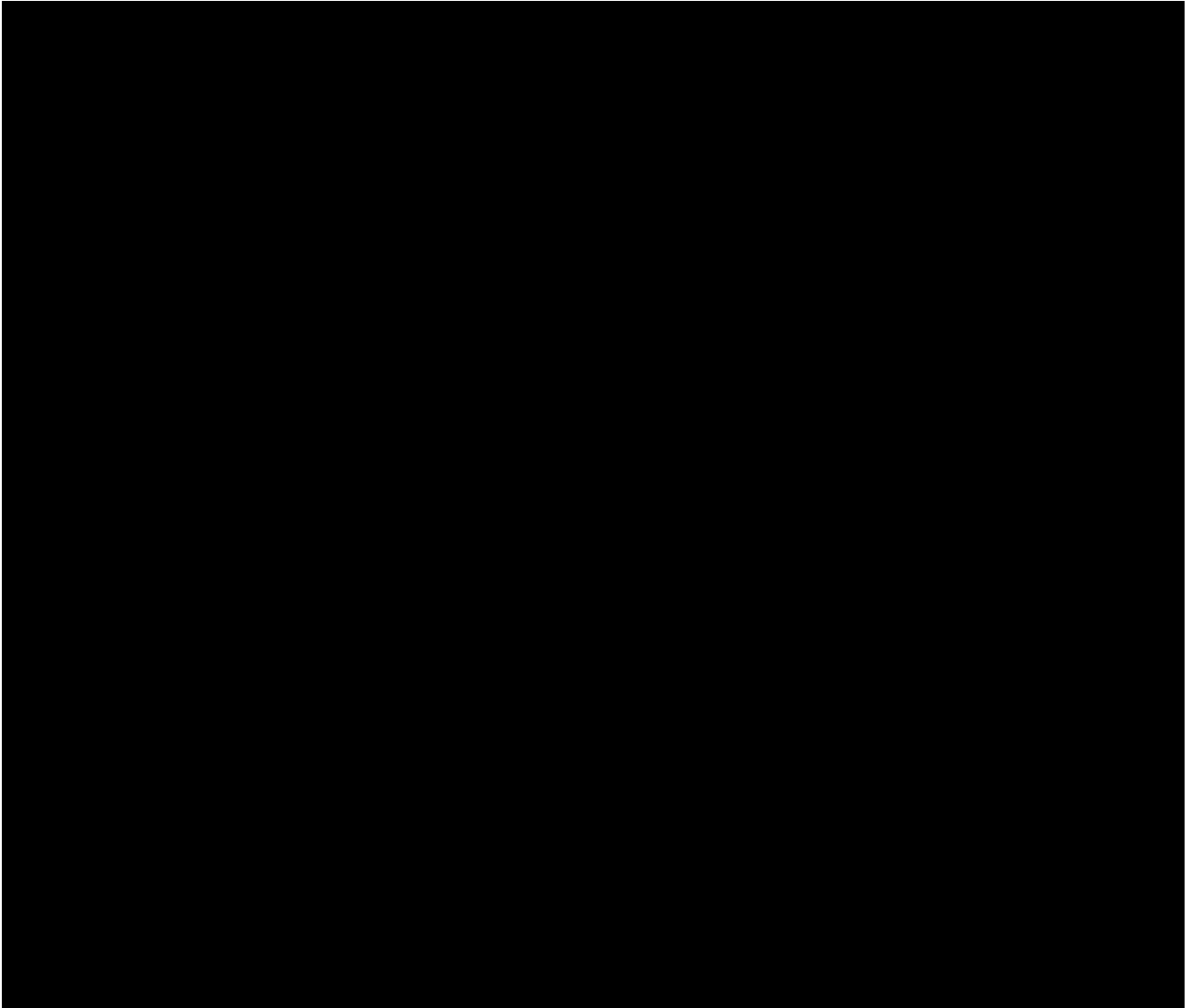
The SCE evaluation team consisted



⁴⁰ 2020 Local Public Sector Request for Abstracts, Participant Instructions, Section 3.08.

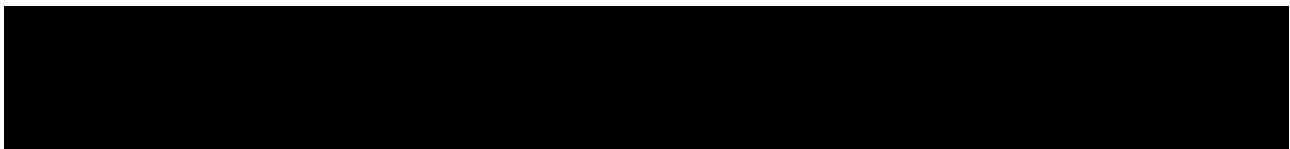
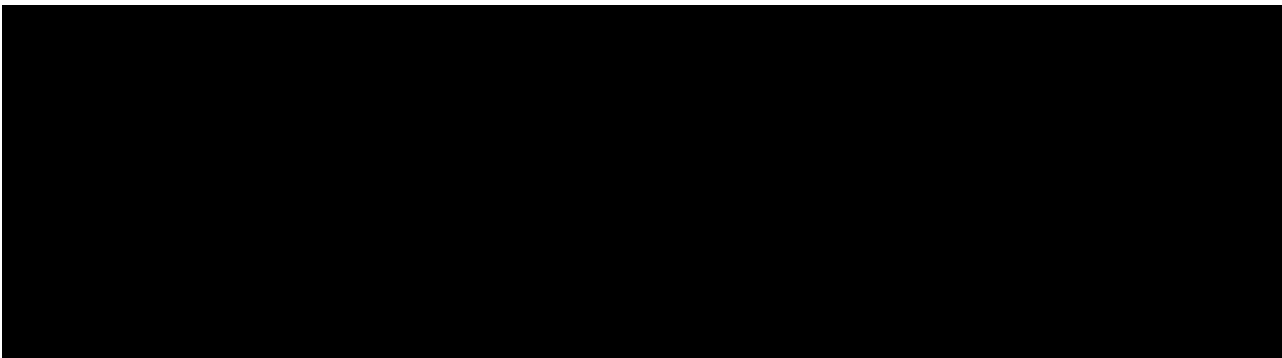
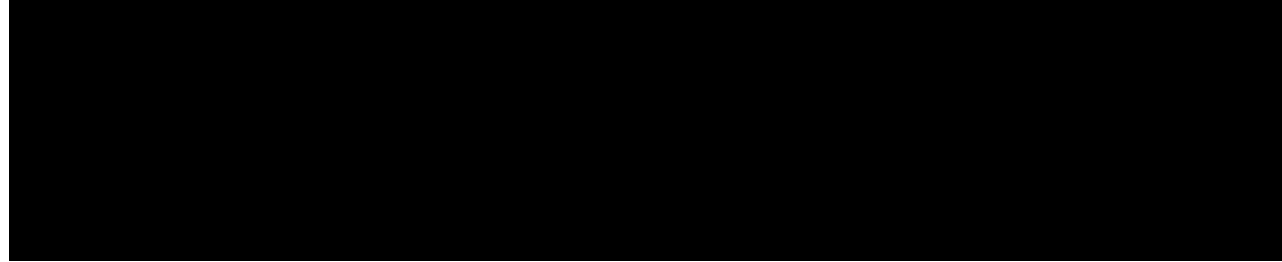
A table with a large black redaction covering the majority of its content. The table has a grid structure with a blue header row and a blue header column. The remaining cells are white with black borders, but their content is obscured by the redaction.

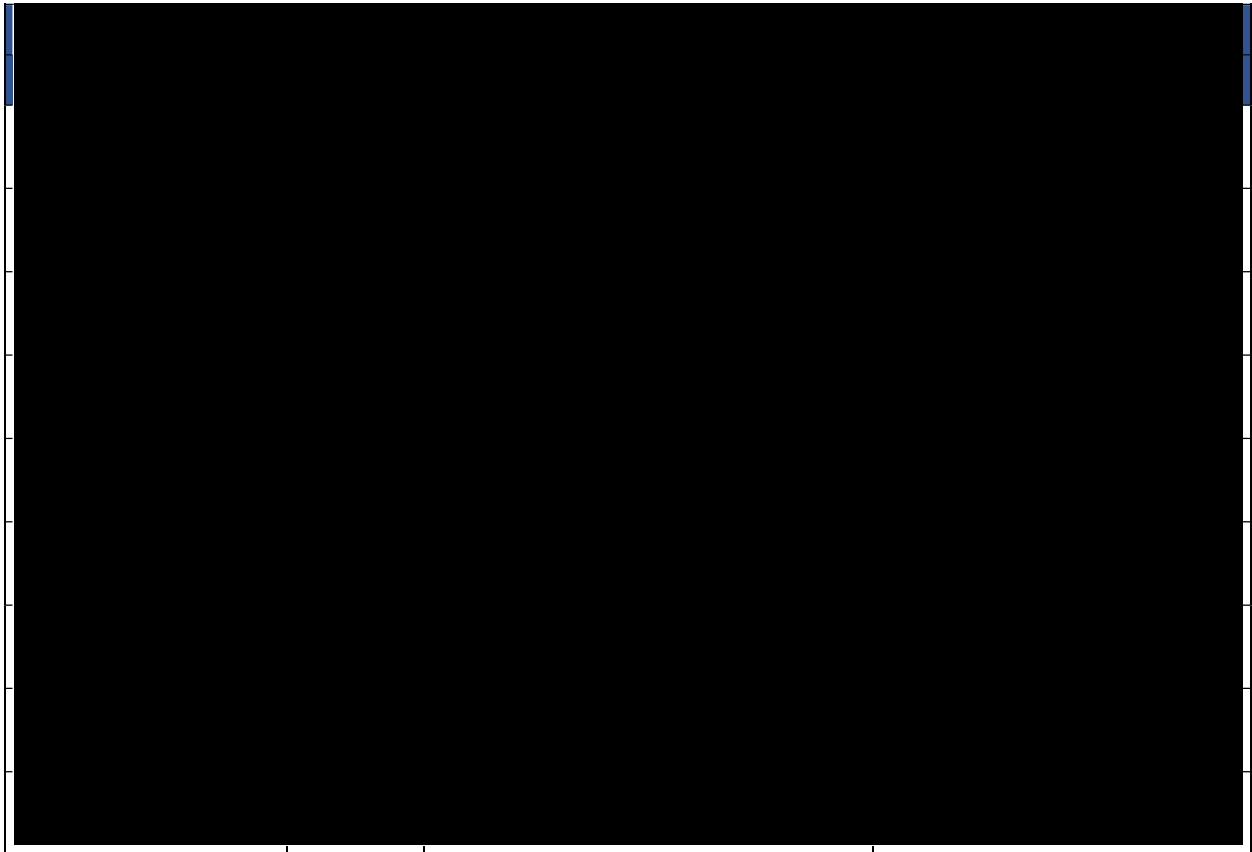
d. Evaluation Processes and Scoring Calibration





e. Shortlist and Final Selections





2.6 PRG and IE Feedback to Abstract Process and Selections

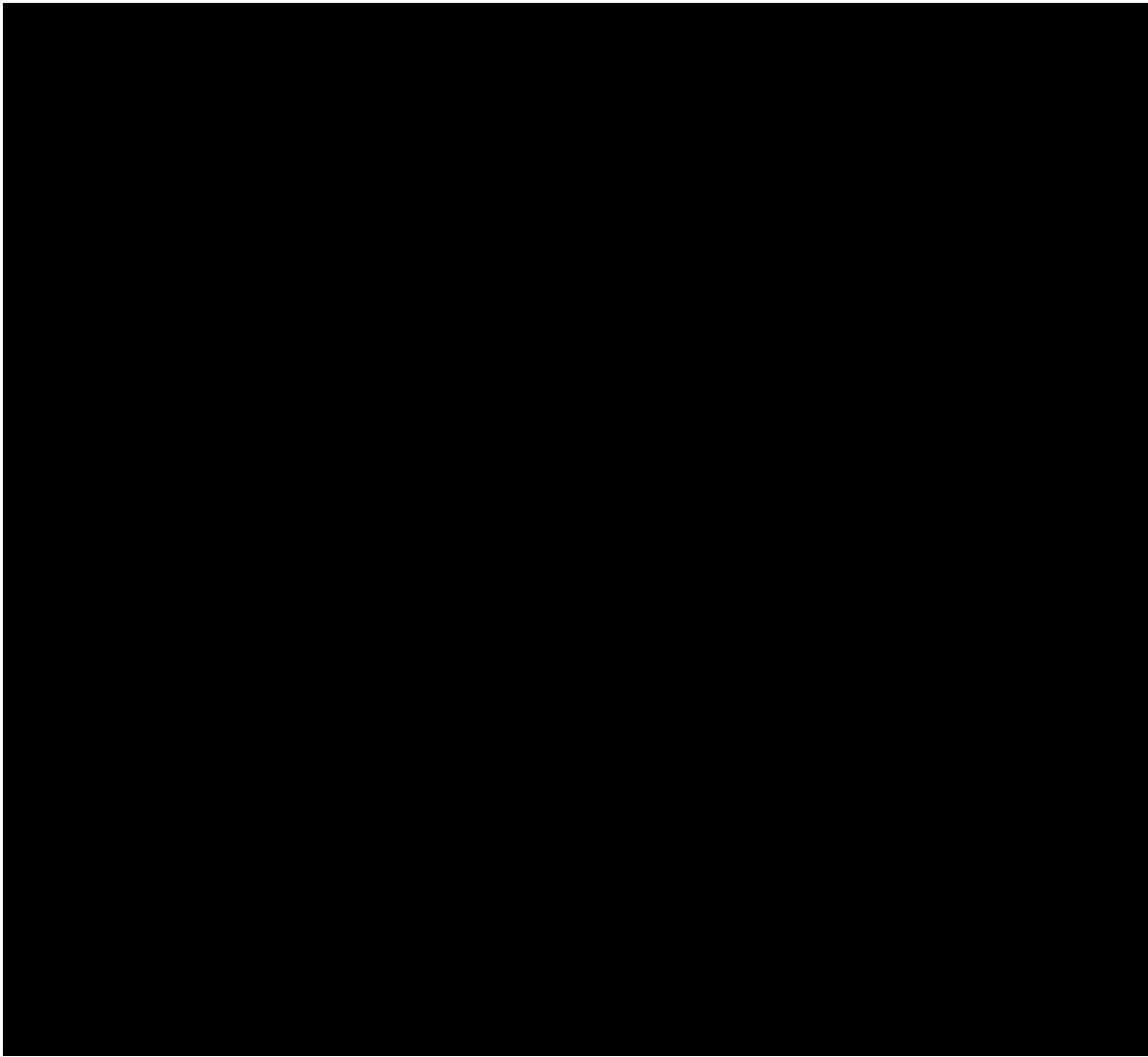
SCE provided the opportunity for both the PRG and the IE to review and comment on the RFA materials. SCE was also provided with the PRG Guidance document and a list of PRG recommended guidelines (aka, the PRG RFA Checklist). The IOUs response to the PRG and the IE feedback is discussed below.

a. Adherence to PRG Guidance

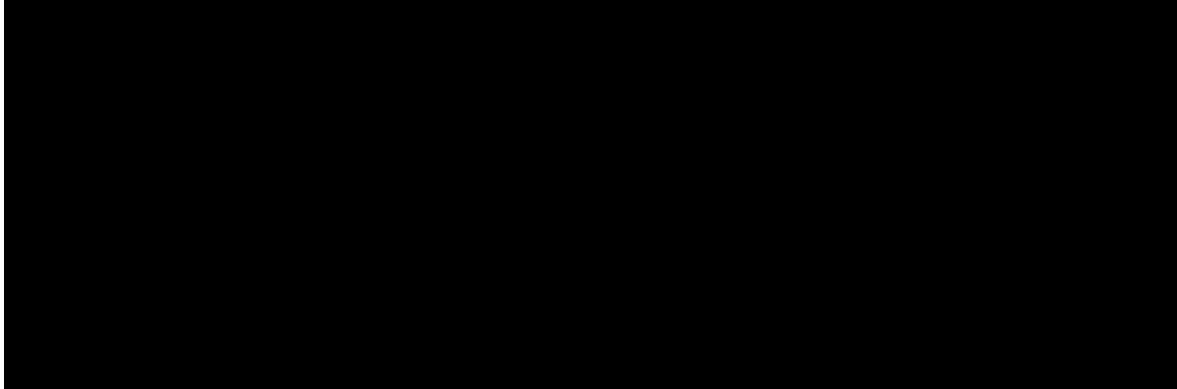
The RFA conformed to the PRG Guidance document.

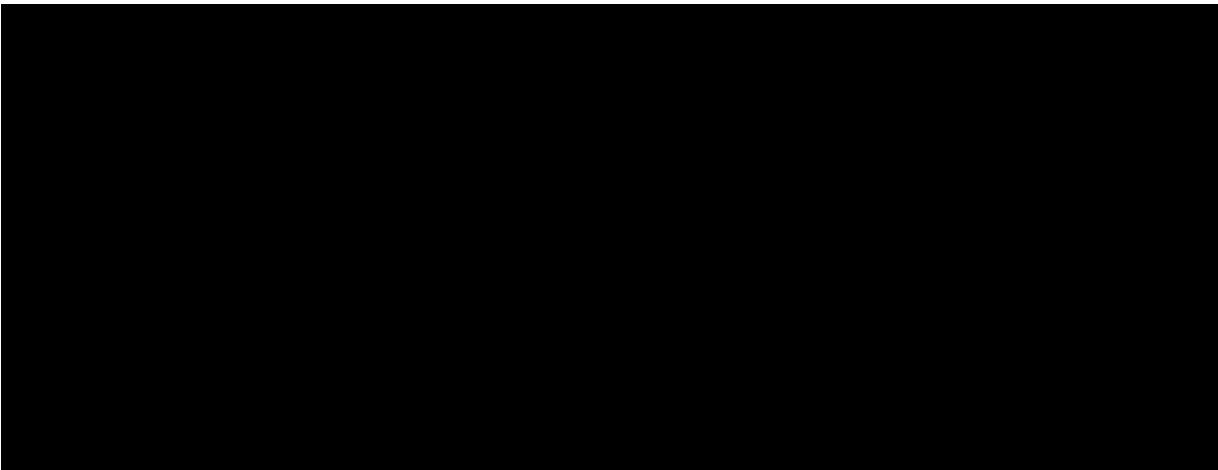
b. Response to IE Feedback

For greater efficiency, the IE reviewed SCE's Local Public Sector RFA along with its Local Agricultural Sector RFA that shares the same solicitation schedule. The IE provided 76 recommendations to SCE. [REDACTED]. Below is a summary of some recommendations considered by the IOU but not accepted:



The IE notes that the IOU did accept a number of significant recommendations including:





3. RFP Bidder Response and Selections

3.1 RFP Development

The RFP requirements were adequate to provide SCE sufficient information on the bidders' proposals. As discussed in Section 3.4, the IE had several recommendations on improving the RFP materials.

The RFP included SCE's proposed EE Agreement which represents the IOU's proposed additions to the CPUC modifiable terms and conditions. The IE supports the inclusion of SCE's proposed EE Agreement as it allows bidders an opportunity to prepare for potential contract negotiations. However, SCE did not provide a similar standard EE Agreement for LGIs.⁴⁴ Instead, the IOU instructed LGIs to reference various documents in order to review SCE's proposed additions to the CPUC modifiable terms and conditions. This places an additional burden on LGIs. Future solicitations should provide the same level of information, in the same format, for all participating bidders.

The RFP also indicates that SCE will not propose to assign financial performance assurance requirements to LGI contracts. The IE supports this decision. We also recommend that any financial performance assurance provision be limited to the estimated direct financial exposure (e.g., upfront payments, etc.) to the IOU and the ratepayer of non-performance caused by the implementer.

3.2 RFP Bidders' Conference

This solicitation activity has not yet occurred; future Semi-Annual Reports will address this topic.

⁴⁴ The CPUC directed the IOUs to use a different set of CPUC standard and modifiable terms and conditions for LGIs.

3.3 Proposal Selection Process

This solicitation activity has not yet occurred; future Semi-Annual Reports will address this topic.

3.4 PRG and IE Feedback to Proposal Process and Selections

SCE provided the opportunity for both the PRG and the IE to review and comment on the RFP materials. SCE was also provided with the PRG Guidance document and a list of PRG recommended guidelines (aka, the PRG RFP Checklist). The IOUs response to the PRG and the IE feedback is discussed below. The RFP selections are pending as of this reporting period. The following section will be updated with PRG and IE feedback on the selection process in the next semiannual report.

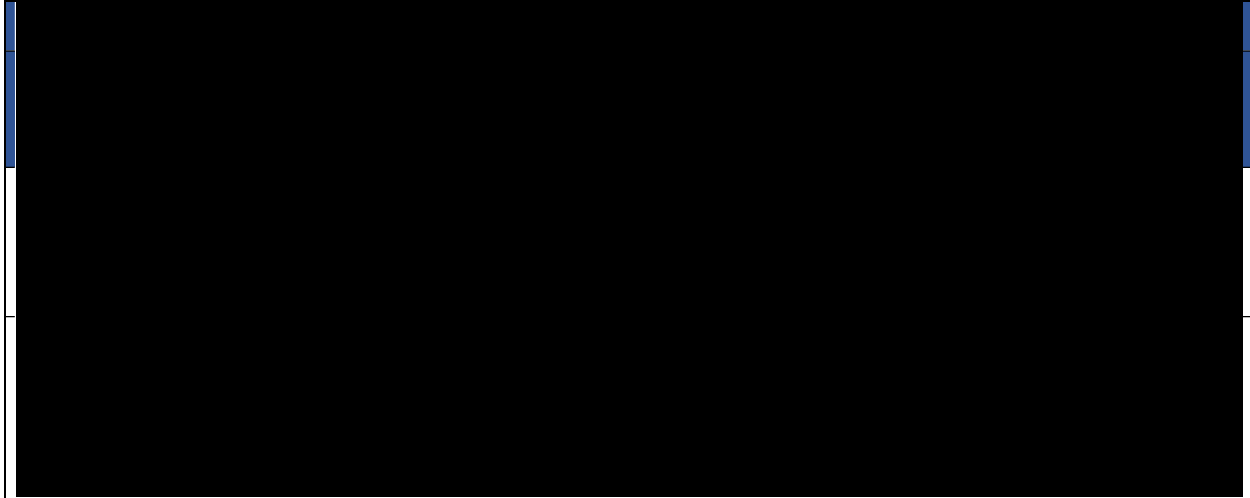
a. Adherence to PRG Guidance

The IE confirmed that the draft RFP conformed to all

[REDACTED]

[REDACTED]

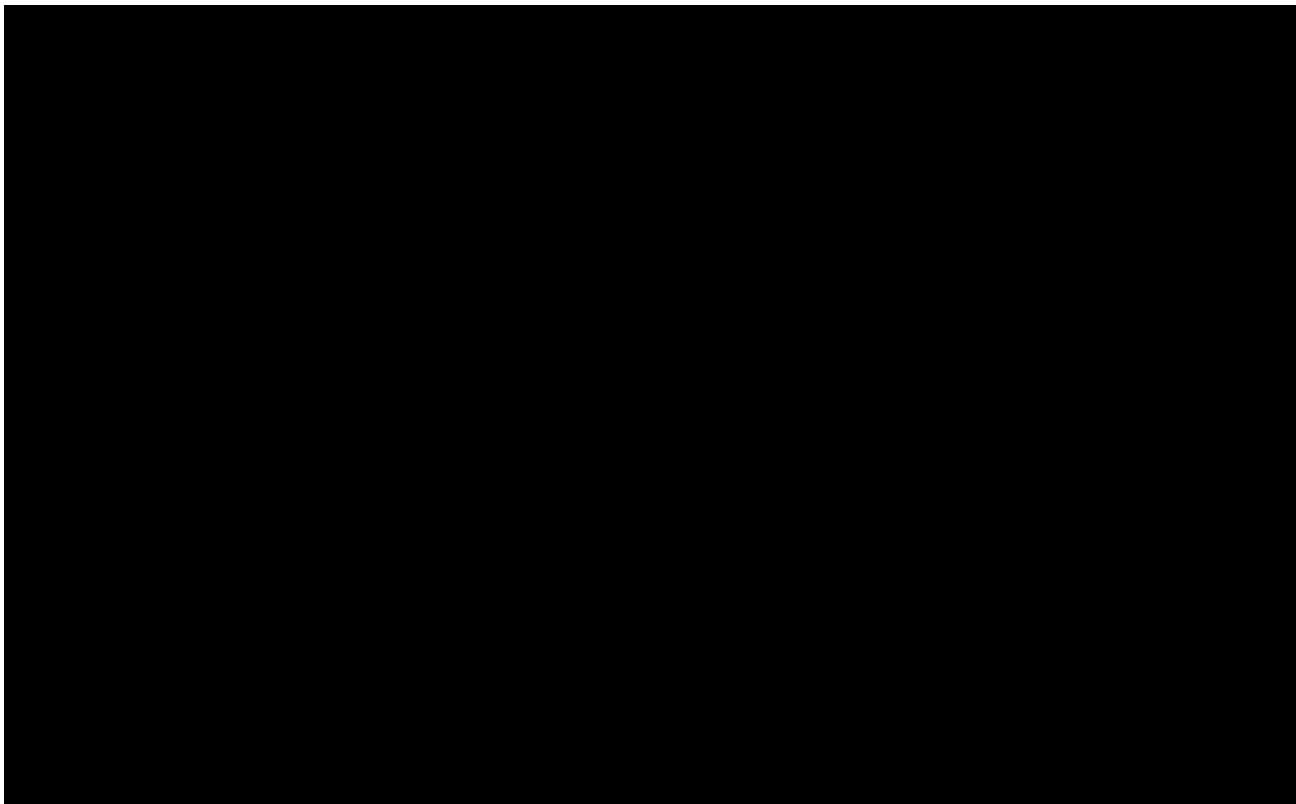
⁴⁵ PRG Solicitation Guidelines, Version 1.0, August 2020.



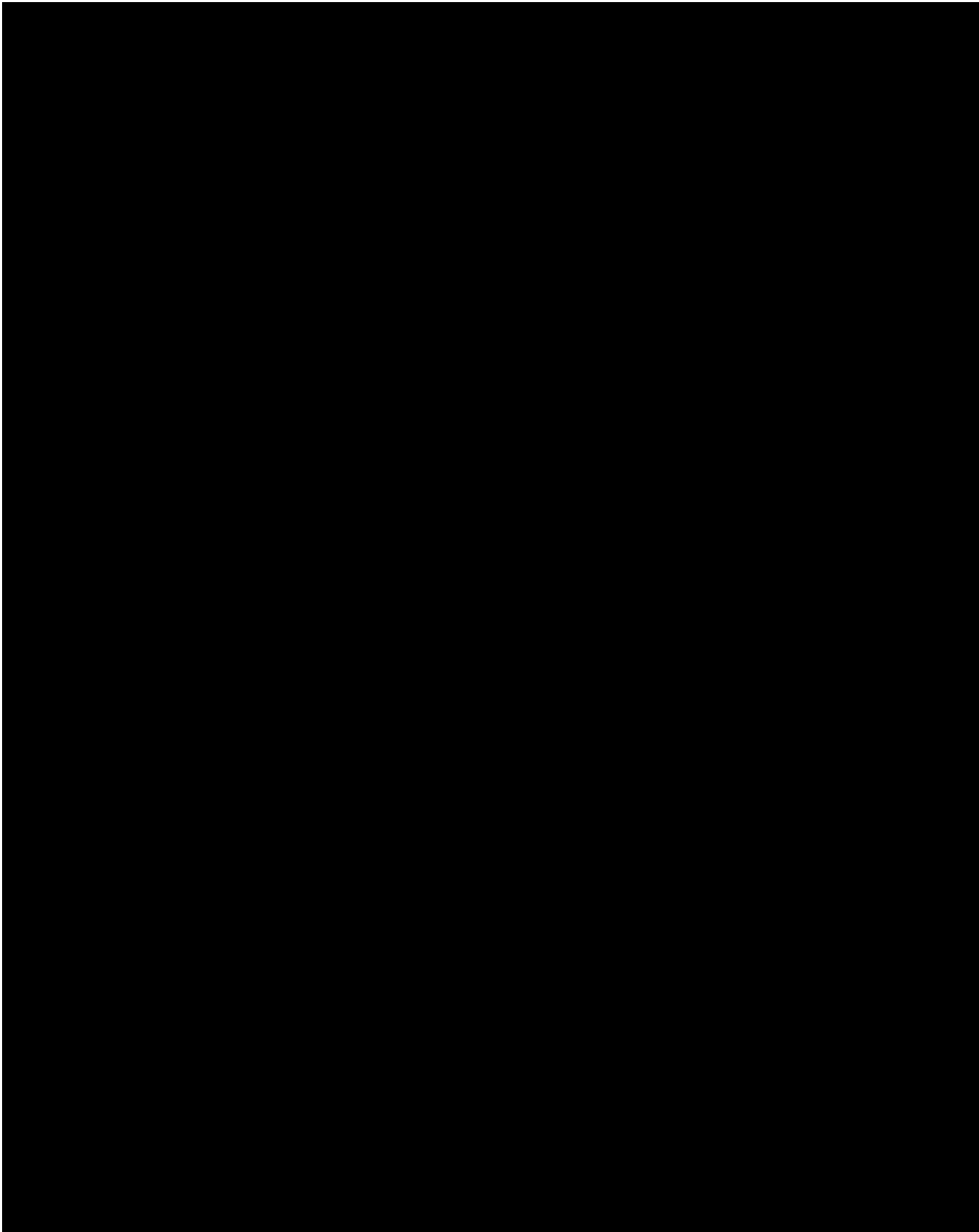
b. Response to IE Feedback

For greater efficiency, the IE reviewed SCE’s Local Public Sector RFP along with its Local Agricultural RFP. The IE provided 84 recommendations to SCE on the Public Sector RFP material including the corresponding scoring rubric. [REDACTED]

[REDACTED] Below is a summary of key recommendations considered by the IOU but not accepted:



⁴⁶ Energy Efficiency Policy Manual, Version 6.0, April 2020, Appendix C.



⁴⁷ Decision 19-08-006, Section 3.3 Pay for Performance, pp. 9-12.

⁴⁸ Id, COL 6, p. 19.

4. Contracting Process

This solicitation activity has not yet occurred; future Semi-Annual Reports will address this topic.

5. Assessment of Final Contract

This solicitation activity has not yet occurred; future Semi-Annual Reports will address this topic.

6. Overall Assessment of Solicitation

This solicitation activity has not yet occurred; future Semi-Annual Reports will address this topic.

7. Implementation Plan Assessment

This solicitation activity has not yet occurred; future Semi-Annual Reports will address this topic.

Energy Efficiency Independent Evaluator's Semi-Annual Report on the
Statewide Higher Education Program Solicitation

Reporting Period: October 2020 through March 2021

Prepared by:
MCR Corporate Services



Disclaimer: This report includes sensitive and confidential information.

Statewide Higher Education Program

1. Solicitation Overview

1.1 Overview

SCE – on behalf of itself, SDG&E, PG&E, and SoCalGas, (collectively the “IOUs”) – issued a solicitation for offers from developers of resource programs to serve statewide Public Higher Education Institutions in California. SCE’s Statewide Higher Education Program (SW Higher Ed) solicitation focused on providing innovative third-party program approaches to support and help modernize EE programs and program delivery and provide the best chance of achieving shared EE and State goals at the lowest cost to higher education customers and the economy.

a. Scope

Offers made in response to the SW Higher Ed solicitation must include resource programs that serve statewide Public Higher Education Institutions such as University of California (UC), California State University (CSU), and California Community Colleges (CCC) EE needs, that are designed and implemented uniformly throughout each of the IOU’s service territories and comply with the CPUC-established energy efficiency policies. As specified in the Participant Instructions for SCE’s 2021 Statewide Higher Education RFA Instructions,

SCE seeks Offers on behalf of all the IOUs for EE Resource Programs that provide EE including gas EE, or EE coupled with Integrated Demand Side Management (“IDSM”) savings solutions for the Statewide Higher Education customers in compliance with, and support of, the CPUC’s EE decisions and other relevant documents. The Offer may propose to address all or individually UC, CSU, and CCC customers or sub-group of these customers.⁴⁹

Offers may propose to address all or individually UC, CSU, and CCC customers or sub-group of these customers. Segments not included in this solicitation include private universities and colleges, trade schools, public or private K-12 schools, and hospitals, except those hospitals that are a part of the UC system.

b. Objectives

The RFA instructions include objectives for the SW Higher Ed solicitation. SCE seeks offers on behalf of all four IOUs for EE resource programs that provide EE including gas EE, or EE coupled

⁴⁹ 2021 Statewide Higher Education Energy Efficiency Program Request for Abstracts Instructions, Ver 1.0, February 4, 2021, at p. 12.

with IDSM savings solutions for the SW Higher Ed customers in compliance with, and support of, the CPUC’s EE decisions and other relevant documents.

In addition to policy objectives, such as encouraging offerors to utilize DBE subcontractors, SCE stated its preferences for offers that result in claimable energy savings and are cost-effective, cost efficient, innovative, and that address customer sector objectives, such as:

- Offers with a TRC Ratio of at least 1.25.
- Offers that have a low cost per net kWh and/or cost per net therm.
- Offers that use pay-for-performance compensation.
- Offer designs that are consistent across all IOU territories.
- Offers that demonstrate innovation.
- Offers that are consistent with the CPUC incentive design guidelines.
- Offers that meet customer sector objectives, including: effective data tracking and monitoring; reducing or eliminating market barriers and free-ridership; maximize energy savings for campuses and facilities located in DAC; assisting the customer in leveraging financing opportunities, programs, and tools; enhancing and improving the customer experience from existing SCE offerings and improving customer satisfaction; and supporting customers’ greenhouse gas (GHG) emission reduction goals.

1.2 Timing

Table 1.1 presents a list of key solicitation milestones and expected completion dates.

Table 1.1: Key Milestones	
Milestones	Completion Date
RFA Stage	
Solicitation Launch	February 4, 2021
Bidders’ Conference	February 11, 2021
Offer Submittal Deadline	March 4, 2021
RFA Shortlist to PRG	April 20, 2021
Shortlisting Notification	April 29, 2021
RFP Stage	
Solicitation Launch	June 1, 2021
Bidders’ Conference	June 8, 2021
Offer Submittal Q&A Period	Through June 30, 2021
Offer Submittal Deadline	July 12, 2021

Table 1.1: Key Milestones	
Milestones	Completion Date
RFP Shortlist to PRG	August 17, 2021
Shortlisting Notification	August 27, 2021
Contracting Stage	
Contracting and Negotiations Period	August 30, 2021 – December 3, 2021
Contracts Presented to PRG	January 18, 2022
Contract Execution	February 9, 2022

1.3 Key Observations

Table 1.2 represents a collection of key IE issues, observations and outcomes, to date, for the SW Higher Ed solicitation.

Table 1.2: Key Issues and Observations			
Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
RFA Instructions	SCE included among the documents the bidder was required to submit an “Offer Narrative.” Of all the information requested of the bidder in this document, SCE intended to score only the Personnel Organizational Chart.	If the Offer Narrative is not scored, it should not be requested of the bidder per Section 4.1.11 of the PRG Solicitation Guidelines (Aug 2020).	SCE removed all references to the Offer Narrative and its requirements from the RFA instructions.

Table 1.2: Key Issues and Observations

Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
[Redacted content]			

2. RFA Bidder Response and Selections

2.1 RFA Development

The IE began its review of the RFA package with a focus [Redacted]
[Redacted]
[Redacted] SCE was receptive to the IE's suggestions overall.



The IE was impressed with SCE’s thoughtful approach and analysis of the options.

2.2 RFA Outreach

SCE devoted a section of its corporate website to listing third-party energy efficiency solicitations opportunities (“Energy Efficiency Program Solicitations: Resources for Third Parties”). SCE also utilized the websites for CAEECC and PEPMA (Proposal Evaluation and Proposal Management Application), which hosts the California Statewide IOU and Energy Efficiency Solicitation website, for notifying the market of the solicitations. As a result, over 2,500 unique companies had received notification of the SW Higher Ed RFA launch as of February 8, 2021.

An important component of SCE’s outreach was to ensure that DBEs are well represented among companies receiving notice of the solicitation. To that end, by February 8, 2021 SCE had provided notice to [REDACTED]. Of the [REDACTED] that had registered for the SW Higher Ed RFA on Ariba, [REDACTED]. Of the [REDACTED] that indicated they “intend to participate” in Ariba, [REDACTED].

2.3 RFA Bidders’ Conference

SCE conducted the SW Higher Ed RFA Bidder’s Conference on February 4, 2020. The SW Higher Ed Bidders’ Conference was scheduled for three hours, with the agenda calling for one hour to cover general solicitation topics, followed by one hour to cover the EE Form Agreement, and one hour for questions.

Participants submitted nine write-in questions during the live conference. [REDACTED] were answered live during the conference. A team of SCE SMEs discussed possible responses offline and came to a consensus response before the response was read aloud by the Conference moderator. “Official” written responses to [REDACTED] were reviewed by both SCE’s SMEs and the IE to ensure the written responses were accurate and reliable. The written responses were then provided to all registered attendees via Ariba two days after the Conference.

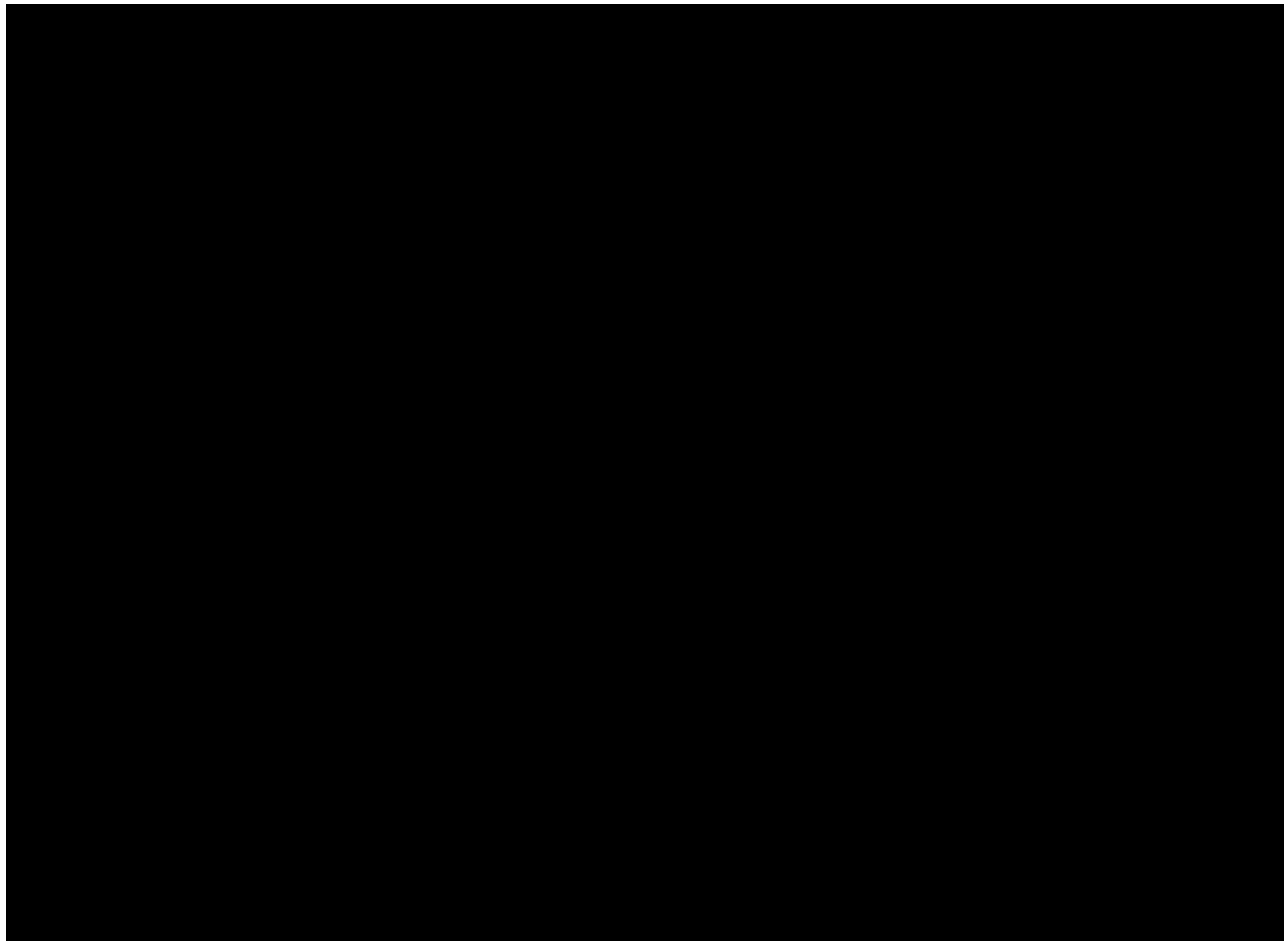
Attendees [REDACTED]. This does not include representatives of SCE, the PRG or the IE

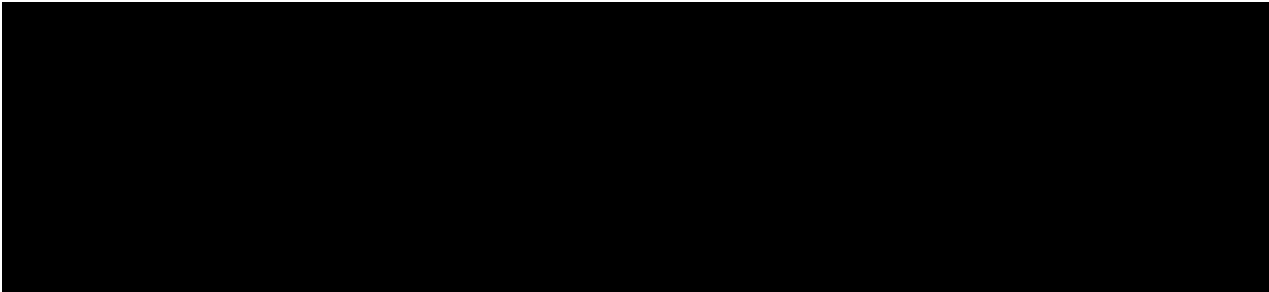
2.4 RFA Bidders' Response

Table 2.1 summarizes the bidder response to the SW Higher Ed RFA.

Table 2.1: Solicitation Abstract Response	
	No.
Abstracts Expected	[REDACTED]
Abstracts Received	[REDACTED]
Abstracts Disqualified	[REDACTED]
Abstracts Shortlisted	[REDACTED]

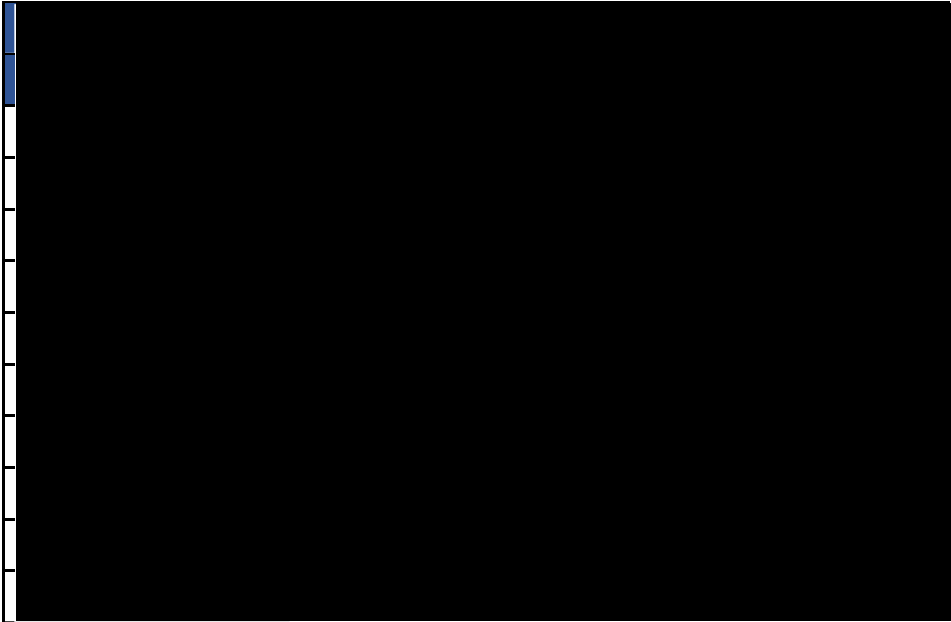
2.5 Abstract Selection Process





b. Evaluation Team Profile.

SCE’s SW Higher Ed evaluation team is listed in Table 2.3. SCE designated a back-up evaluator from each department that could step in in the event the primary evaluator was unable to perform their evaluation. None of the back-ups were needed.



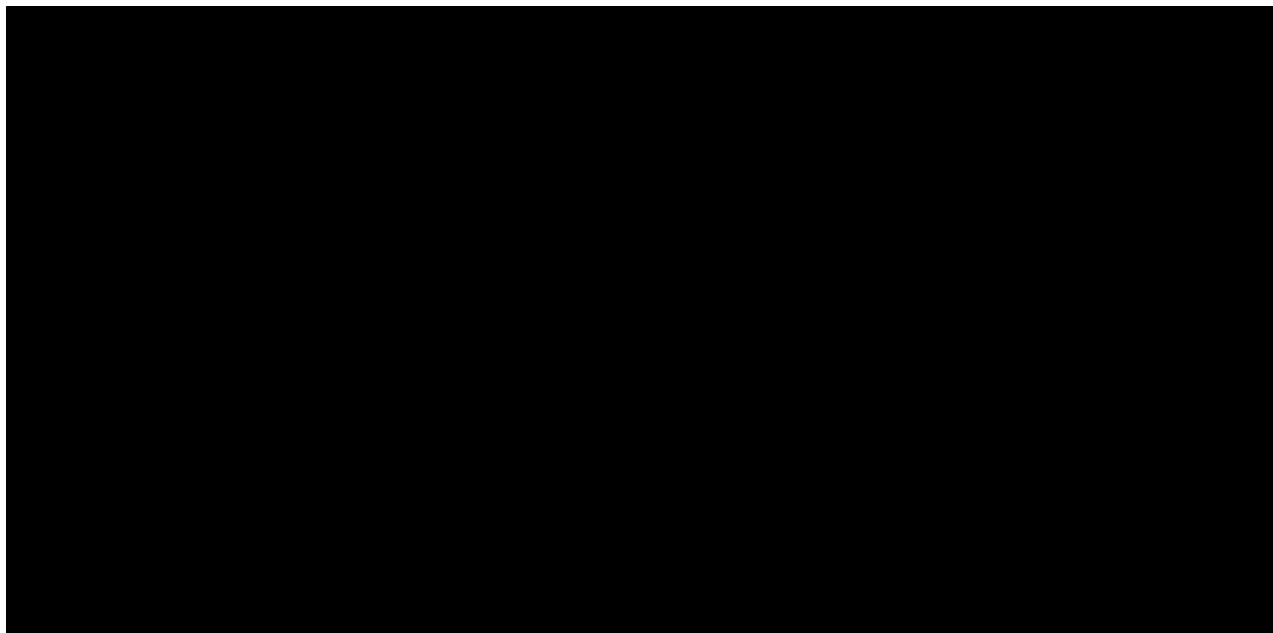
c. Scoring Rubric Design

Table 2.4 details the scoring rubric for SCE’s SW Higher Ed abstracts. The categories and sub-categories and their associated weighting follow guidance in Appendix K of the EE PRG Solicitation Guidelines (Ver 1.1, August 2020).

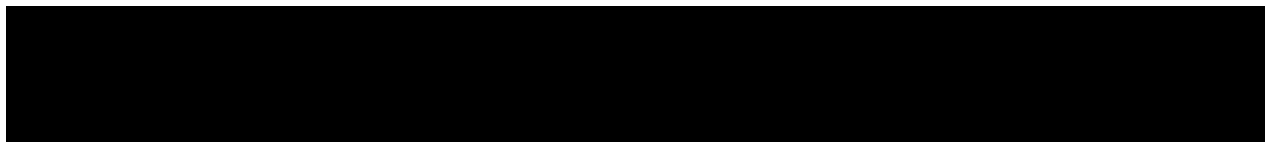
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d. Evaluation Processes and Scoring Calibration

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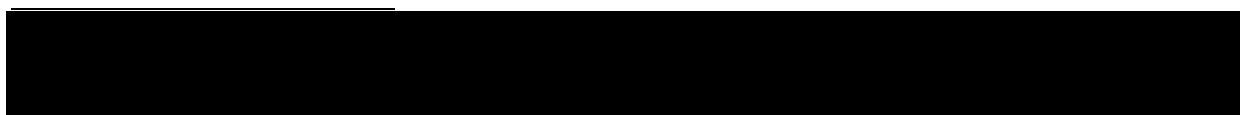
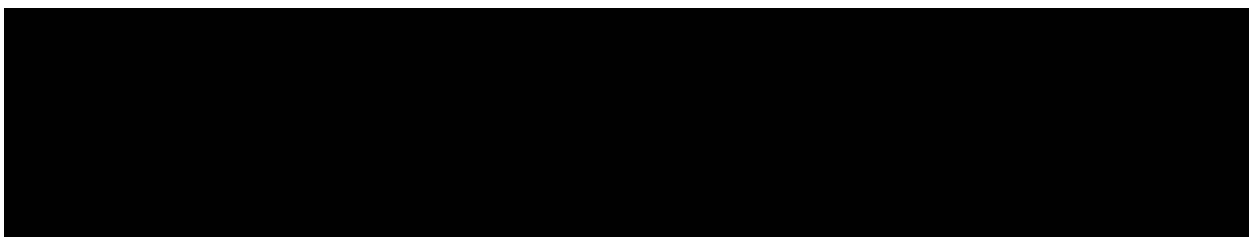


e. Abstract Selections



2.6 PRG and IE Feedback to Abstract Process and Selections

a. Adherence to PRG Guidance and Feedback





b. Response to IE Feedback



3. RFP Bidder Response and Selections

Not applicable at this Stage.

4. Contracting Process

Not applicable at this Stage.

5. Assessment of Final Contract

Not applicable at this Stage.

6. Overall Assessment of Solicitation

Not applicable at this Stage.

7. Implementation Plan Assessment

Not applicable at this Stage.

Energy Efficiency Independent Evaluator's Semi-Annual Report on the
Statewide Water/Wastewater Pumping Program Solicitation

Reporting Period: October 2020 through March 2021

Prepared by:
MCR Corporate Services



Disclaimer: This report includes sensitive and confidential information.

Statewide Water/Wastewater Pumping Program

1. Solicitation Overview

1.1 Overview

SCE – on behalf of itself, SDG&E, PG&E, and SoCalGas, (collectively the “IOUs”) – issued a solicitation for offers from developers of resource programs to serve Water/Wastewater Pumping facilities’ energy efficiency needs across California. SCE’s Statewide Water/Wastewater Pumping Program (SW WWP) solicitation focused on providing innovative third-party program approaches to support and help modernize EE programs and program delivery and provide the best chance of achieving shared EE and State goals at the lowest cost to California’s water/wastewater pumping customers.

a. Scope

Offers made in response to the SW WWP solicitation must include resource programs that serve water/wastewater pumping facilities’ EE needs, that are designed and implemented uniformly throughout each of the IOU’s service territories and comply with the CPUC-established energy efficiency policies. As specified in the Participant Instructions for SCE’s 2021 Statewide Water/Wastewater Pumping RFA Instructions,

SCE seeks Offers on behalf of all the IOUs for EE Resource Programs that provide EE including gas EE, or EE coupled with Integrated Demand Side Management (“IDSM”) savings solutions for the Statewide Water/Wastewater Pumping customers in compliance with, and support of, the CPUC’s EE decisions and other relevant documents.⁵²

Statewide water/wastewater pumping customers are defined as:

...customers that use energy in water production, conveyance, water treatment, oil field clear water pumping, distribution and wastewater treatment activities (Source Water Pumping, Water Treatment, Water Distribution, Waste-Water Treatment). Eligible customers may include water district, irrigation district, municipal utilities, city and county departments, as well as investor-owned water utilities.⁵³

⁵² 2021 Statewide Water/Wastewater Pumping Energy Efficiency Program Request for Abstracts Instructions, Ver 1.0, March 4, 2021, at p. 11.

⁵³ Id., at p. 13.

Finally, eligible customers must pay Public Purpose Program (PPP) charges on fuels supplied by SCE, SCG, SDG&E or PG&E.

b. Objectives

The RFA Instructions include objectives for the SW WWP solicitation. SCE seeks offers on behalf of all four IOUs for EE resource programs that provide EE including gas EE, or EE coupled with IDSM savings solutions for the SW WWP customers in compliance with, and support of, the CPUC’s EE decisions and other relevant documents.

In addition to policy objectives, such as encouraging offerors to utilize diverse business enterprise (DBE) subcontractors, SCE stated its preferences for offers that result in claimable energy savings and are cost-effective, cost efficient, innovative, and that address customer sector objectives, such as:

- Offers with a TRC Ratio of at least 1.25.
- Offers that have a low cost per net kWh and/or cost per net therm.
- Offers that use pay-for-performance compensation.
- Offer designs that are consistent across all IOU territories.
- Offers that demonstrate innovation.
- Offers that are consistent with the CPUC incentive design guidelines.
- Offers that meet customer sector objectives, including effective data tracking and monitoring; reducing or eliminating market barriers and free-ridership; maximize energy savings for campuses and facilities located in DAC; assisting the customer in leveraging financing opportunities, programs, and tools; enhancing and improving the customer experience from existing SCE offerings and improving customer satisfaction; and supporting customers’ greenhouse gas (GHG) emission reduction goals.

1.2 Timing

Table 1.1 presents a list of key solicitation milestones and expected completion dates. It should be noted that SCE released the SW WWP RFA one week earlier than planned because IE and PRG review were completed early. This change to the schedule will not impact the dates of any subsequent milestones.

Table 1.1: Key Milestones	
Milestones	Completion Date
RFA Stage	
Solicitation Launch	February 25, 2021
Bidders’ Conference	March 11, 2021

Table 1.1: Key Milestones	
Milestones	Completion Date
Offer Submittal Deadline	April 13, 2021
RFA Shortlist to PRG	May 18, 2021
Shortlisting Notification	May 27, 2021
RFP Stage	
Solicitation Launch	July 1, 2021
Bidders' Conference	July 8, 2021
Offer Submittal Q&A Period	Through July 26, 2021
Offer Submittal Deadline	August 5, 2021
RFP Shortlist to PRG	September 21, 2021
Shortlisting Notification	September 27, 2021
Contracting Stage	
Contracting and Negotiations Period	September 28, 2021 – January 3, 2022
Contracts Presented to PRG	February 15, 2022
Contract Execution	March 22, 2022

1.3 Key Observations

Table 1.2 represents a collection of key IE issues, observations and outcomes, to date, for the SW WWP solicitation.

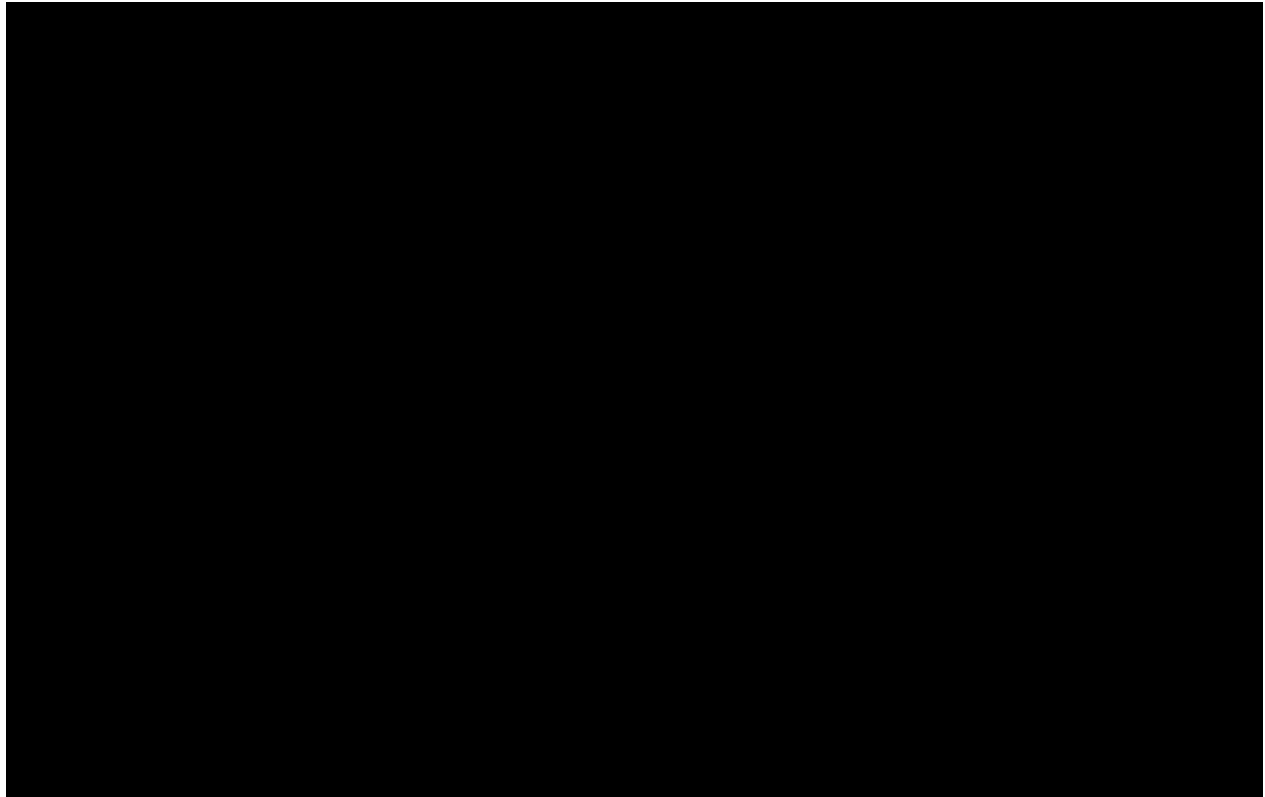
Table 1.2: Key Issues and Observations			
Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
RFA Instructions	The RFA Instructions provides examples of Water /Wastewater Pumping facilities, but scope of solicitation is still vague.	Provide NAICS codes or some other means of specifying what types of facilities are eligible to be served by this program.	SCE adopted this recommendation and provided a list of applicable facility types by NAICS codes.
[Redacted Content]			

Table 1.2: Key Issues and Observations

Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
[Redacted content]			

2. RFA Bidder Response and Selections

2.1 RFA Development



2.2 RFA Outreach

SCE has devoted a section of its corporate website to listing third-party energy efficiency solicitations opportunities (“Energy Efficiency Program Solicitations: Resources for Third Parties”). SCE also utilized the websites for CAEECC and PEPMA, which hosts the California Statewide IOU and Energy Efficiency Solicitation website, for notifying the market of the solicitations. As a result, over 2,300 unique companies had received notification of the SW WWP RFA launch as of March 16, 2021.

An important component of SCE’s outreach was to ensure that Diverse Business Enterprises (DBE) are well represented among companies receiving notice of the solicitation. To that end, by March 16, 2021 SCE had provided notice to [REDACTED]. Of the [REDACTED] that had registered for the SW WWP RFA on Ariba, [REDACTED]. Of the [REDACTED] that indicated they “intend to participate” in Ariba, [REDACTED].

2.3 RFA Bidders' Conference

SCE conducted the SW WWP RFA Bidder's Conference on March 10, 2021. The SW WWP Bidders' Conference was scheduled for 2-1/2 hours, with the agenda calling for one hour to cover general solicitation topics, followed by 1/2 hour to cover the EE Form Agreement, and one hour for questions.

Participants submitted [REDACTED] during the live conference. [REDACTED] were answered live during the conference. A team of SCE SMEs discussed possible responses off-line and came to a consensus response before the response was read aloud by the Conference moderator. "Official" written responses to the [REDACTED] were reviewed by both SCE's SMEs and the IE to ensure the written responses were accurate and reliable. The written responses were then provided to all registered attendees via Ariba two days after the Conference.

Attendees included [REDACTED] representing [REDACTED]. These figures do not include the 17 attendees representing SCE, the PRG or the IE.

2.4 RFA Bidders' Response

Bidder responses to the SW WWP RFA were not due until after the end of the reporting period for this Semi-Annual Report. Activities covered by most of the remaining sections of this report will be reported in future Semi-Annual Reports.

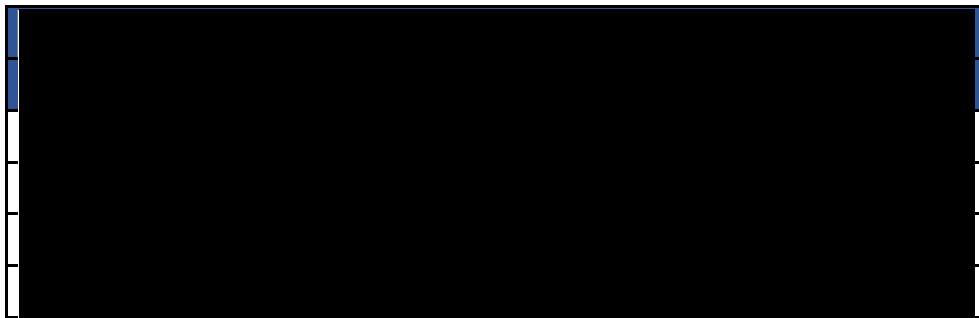
2.5 Abstract Selection Process

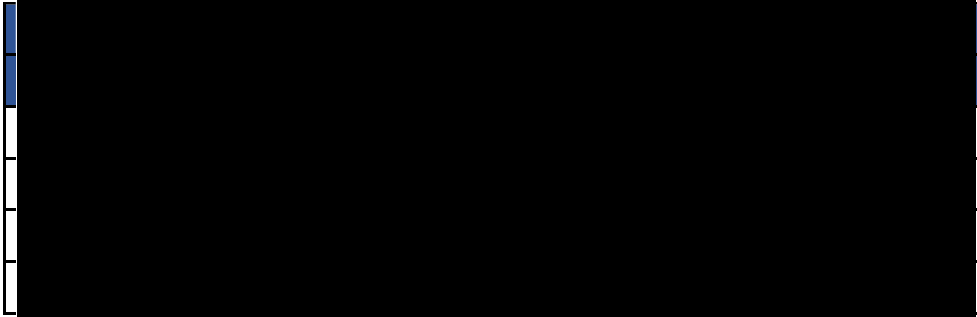
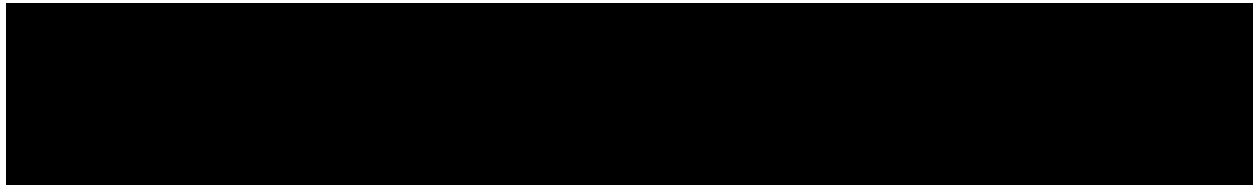
a. Bid Screening Process and Management of Deficient Bids

Not applicable at this Stage.



b. Evaluation Team Profile.

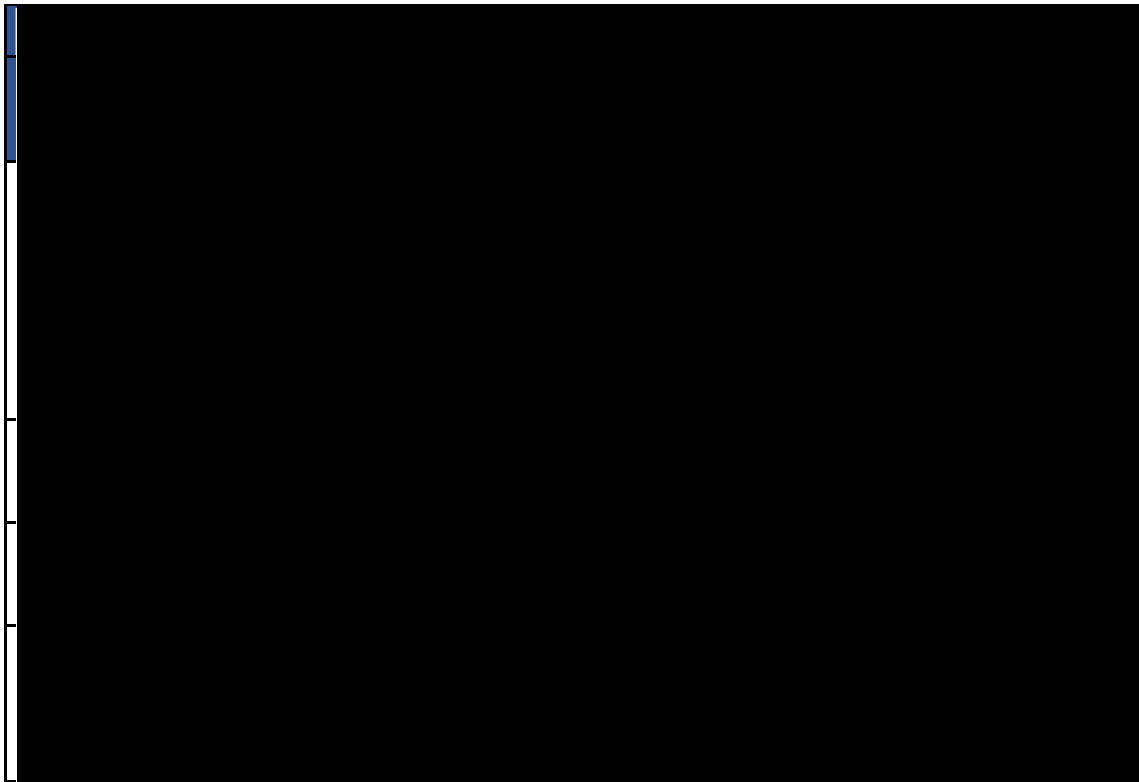
SCE's SW WWP evaluation team is listed in Table 2.1. SCE designated a back-up evaluator from each department that could step in in the even the primary evaluator was unable to perform their evaluation. None of the back-up were needed.



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c. Scoring Rubric Design

Table 2.2 details the scoring rubric for SCE’s SW WWP abstracts. 
 of the EE PRG Solicitation
Guidelines (Ver 1.1, August 2020).

A large table that has been completely redacted with a black box. Only the left-hand side grid lines are visible, showing a single column with four rows.

d. Evaluation Processes and Scoring Calibration

Not applicable at this Stage.

e. Abstract Selections

Not applicable at this Stage.

2.6 PRG and IE Feedback to Abstract Process and Selections

Not applicable at this Stage.

3. RFP Bidder Response and Selections

Not applicable at this Stage.

4. Contracting Process

Not applicable at this Stage.

5. Assessment of Final Contract

Not applicable at this Stage.

6. Overall Assessment of Solicitation

Not applicable at this Stage.

7. Implementation Plan Assessment

Not applicable at this Stage.