

**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

PUBLIC VERSION

**ENERGY EFFICIENCY THIRD-PARTY SOLICITATION PROCESS SEMI-ANNUAL
INDEPENDENT EVALUATOR REPORT - SAN DIEGO GAS & ELECTRIC
COMPANY (U 902-M)**

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January 7, 2020

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OF THE STATE OF CALIFORNIA**

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**ENERGY EFFICIENCY THIRD-PARTY SOLICITATION PROCESS SEMI-ANNUAL
INDEPENDENT EVALUATORS' REPORT - SAN DIEGO GAS & ELECTRIC
COMPANY (U 902-M)**

Pursuant to Decision (D.) 18-01-004, Independent Evaluators have conducted a semi-annual assessment of the third-party Energy Efficiency (EE) program solicitation process and progress of San Diego Gas & Electric Company (SDG&E) for submittal to the California Public Utilities Commission (CPUC) in Rulemaking 13-11-005.¹

San Diego Gas & Electric Company hereby files this Semi-Annual Independent Evaluators' Report (Report) on behalf of the Independent Evaluators' for the reporting period May 2019 through October 2019. This Report was not prepared by SDG&E. SDG&E was provided the opportunity to review the Report, but provided limited input into the drafting of the Report. SDG&E reserves the right to object to the content of the Report elsewhere in this Rulemaking. The Report is attached hereto as Attachment A.

Dated in San Diego, California, this 7th day of January, 2020.

Respectfully submitted,

By: /s/ Erica L. Martin
Erica L. Martin

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¹ D.18-01-004 at Ordering Paragraph 5c.

ATTACHMENT A

SEMI-ANNUAL INDEPENDENT EVALUATORS' REPORT

Semi-Annual Independent Evaluators' Report

Energy Efficiency Third-Party Solicitation Process

San Diego Gas & Electric Company

Reporting Period: May 2019 through October 2019

Prepared by:

Barakat Consulting, Inc.

Don Arambula Consulting

MCR Corporate Services

The Mendota Group, LLC

December 31, 2019

Disclaimer: Certain portions of this report are redacted due to the sensitive nature of the information.

SEMI-ANNUAL INDEPENDENT EVALUATORS' REPORT – SAN DIEGO GAS & ELECTRIC

TABLE OF CONTENTS

I. Overview	3
A. Purpose	3
B. Background	3
C. Overview of Solicitations.....	4
D. IE Assessment of Solicitations.....	5
E. PRG Feedback on Solicitations	10
F. Stakeholder Feedback from CPUC Workshops	11
II. Attachments: Individual IE Semi-Annual Solicitation Reports.....	13
Local Small Commercial	15
Local Large Commercial	24
Local Multi-Family Residential	33
Statewide Plug Load and Appliance	46
Statewide Upstream/Midstream HVAC	59
Local Public Sector K-12.....	68
Local Public Sector Federal.....	78
Local Residential Single-Family	88

I. Overview

A. Purpose

The Semi-Annual Independent Evaluator Report (Report) provides an assessment of the San Diego Gas & Electric Company's (SDG&E or the Company) third-party energy efficiency (EE) program solicitation process and progress by SDG&E's assigned Independent Evaluators (IEs). The Report is intended to provide feedback to SDG&E and other stakeholders on the progress of the Company's energy efficiency program solicitations in compliance with the California Public Utilities Commission (CPUC) direction.¹

In compliance with Decision 18-01-004, IEs are ordered to provide assessments of the overall third-party EE program solicitation process and progress on at least a semi-annual basis to the CPUC via reports filed in the relevant EE rulemaking (currently Rulemaking 13-11-005).² This Semi-Annual Report is provided in response to this requirement and represents an assessment of the program solicitation activities conducted during the period from May 2019 through October 2019. These Reports will be filed periodically throughout SDG&E's entire third-party program solicitation process. This Report identifies areas for improvement and highlights best practices as noted by the IEs based on SDG&E's current program solicitations. The Report is not intended to replace the required Final IE Assessment Reports, which will be provided to SDG&E and its Energy Efficiency Procurement Group (EE PRG) by the assigned IE at the conclusion of each solicitation.

Due to the sensitive nature of the information contained in the IEs' assessments, the Report includes Public and Non-Public Sections. The Non-Public Sections include more detailed assessments of each solicitation. The Non-Public Sections are deemed to contain information that might disclose market sensitive information that could provide a competitive advantage to other businesses if this information was released, which could lead to a negative or detrimental impact on the bidders, the customers, and/or the Company.

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. In January 2018, the CPUC adopted Decision 18-01-004 directing the four California Investor-Owned Utilities (IOUs)—SDG&E, Pacific Gas and Electric Company (PG&E), Southern California Edison Company (SCE), and Southern California Gas Company (SoCalGas)—to ensure that their EE portfolios contain a minimum percentage of third-party designed and implemented programs by predetermined dates over the next three years. In October 2019, SDG&E sought an extension of time from the CPUC of this requirement. In November 2019, the CPUC granted the IOU an extension of time to meet the minimum percentage thresholds as shown below³:

- At least 25 percent by June 30, 2020 (revised)

¹ Decision 18-01-004, OPN 5.c.

² Id.

³ 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.

- At least 40 percent by December 31, 2020
- At least 60 percent by December 31, 2022

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.⁴

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

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

C. Overview of Solicitations

The Report represents a collection of individual IE assessments for each of SDG&E'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 SDG&E has yet to release an RFA.

⁴ Decision 18-01-004, p. 31.

Table C.1: Solicitations Overview (May 2019 thru October 2019)			
	Solicitations	Assigned IEs	Solicitation Status
1	Local Small Commercial	The Mendota Group	RFP
2	Local Large Commercial	The Mendota Group	RFP
3	Local Multi-family Residential	MCR Corporate Services	RFP
4	Statewide Plug Load and Appliance	Don Arambula Consulting	RFA
5	Statewide Upstream/Midstream HVAC	The Mendota Group	RFP
6	Local Public K-12	MCR Corporate Services	RFA
7	Local Public Sector Federal	MCR Corporate Services	RFA
8	Local Residential Single Family	Don Arambula Consulting	RFA

Legend:
Pre-RFA Stage: Activities conducted prior to RFA release
RFA: Includes bid preparation and evaluation period
Pre-RFP Stage: Activities conducted prior to RFP release
RFP: Includes bid preparation evaluation period
Contracting: Contract negotiations
Suspended: Solicitation held until a later date
Cancelled: Solicitation withdrawn, scope may be included as part of a future solicitation

D. IE Assessment of Solicitations

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

- **Reduce RFA and RFP requirements**—There are too many bidders’ questions, some of which appear duplicative, less relevant, or not appropriate for the solicitation stage. Further, limits should be placed on the length of the bidder response to reduce the burden on reviewers and, more importantly, to equalize the information provided by all bidders.
- **Shorten solicitation schedule**—The IOU should reduce the solicitation timeline. The PRG should support and facilitate more aggressive timelines, recommend reduced RFA/RFP bidder requirements, and encourage coordination among IOUs on multiple solicitation schedules.





Table D.1: Solicitations Overview

Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
IE Pool Input	IEs have found that IOUs benefit from drawing on the collective wisdom of their IE pool for insights about ongoing solicitations.	SDG&E should adopt a practice of meeting regularly with its pool of IEs to leverage IE insights and observations about solicitations	SDG&E has initiated monthly meetings with the IE pool, and it is proving beneficial to its solicitation processes.
Lessons Learned/ Continuous Improvement	The IOU has not formally instituted a “lessons learned” exercise into its overall solicitation process.	Each solicitation stage should include a lessons-learned review to incorporate into templates (and processes) any insights gained during the stage. This should involve all IEs so that these lessons are available for all to incorporate into future solicitations.	SDG&E stated they will start using a lessons-learned approach to develop a Q&A response template to enable more consistency in responses. The IOU is also working within its solicitation team to share and incorporate best practices.
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Proposal Template Form	“Offer Form” presented to bidders (and reviewers) as an Excel workbook was very difficult to review and likely challenging for bidders to input data.	SDG&E should modify its template to use Microsoft Word for responses that are primarily text and Excel for responses that are primarily numbers or are in tabular form.	SDG&E has not adopted this recommendation as the Company believes it helps their evaluators review the bidders’ responses.

Table D.1: Solicitations Overview			
Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
RFP Questions	The Offer Form requested that bidders provide responses to many questions, some of which duplicated information in other questions and some which were less relevant to the direct the evaluation of the program.	The Offer Form should be revisited to reduce the number of questions and focus on the important information that bidders need to provide.	SDG&E has worked to reduce the number of questions.
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Contract Template	Recreating contract documents is not an effective use of time. Suggest leveraging a standard document.	Leverage the IE pool to develop a contract template.	SDG&E is currently developing a contract process that will be shared with the PRG and IEs in 2020.
RFA Requirements	The RFA required additional information such as a bidder's proposed Program Logic Model (PLMs), proposed program ramp-up activities, and KPIs that were either redundant to other information already requested.	IEs recommended (and supported by the PRG) that such requirements should be moved to the RFP stage (i.e., KPIs) or after the implementer is under contract (i.e., PLM) or in contract negotiations (i.e., program ramp-up activities). Going forward, the IOU should reduce the RFA requirements and use Stage 1 of the solicitation as a filter to remove lower scoring abstracts with little chance of success for final selection.	The IOU did not accept the recommendation and required bidders to provide in the RFA stage. SDG&E believes such information helps inform the team during evaluation of the abstract.

Table D.1: Solicitations Overview			
Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Table D.1: Solicitations Overview			
Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
Shorten Solicitation Schedule	The IOU should revisit project schedule to reduce the time to complete solicitation. For example, IOU allows 13 weeks to evaluate and select abstracts. This timeframe could be reduced.	The IOU should strive to reduce the solicitation timeline. The PRG should support and facilitate more aggressive timelines, recommend reduced RFA/RFP bidder requirements, and encourage coordination among IOUs on solicitation schedules.	Pending. SDG&E is currently reviewing solicitation schedules to identify improvements to the overall timing and completion of the solicitations. The IOU notes that PRG availability also impacts the timelines.
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Table D.1: Solicitations Overview			
Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

E. PRG Feedback on Solicitations

Table E.1 captures the key recommendations provided by the PRG that were **not accepted** by the IOU and rationale for not adopting the recommendations. The table is intended to only highlight key recommendations not accepted by the IOU. For a complete list of other PRG recommendations and IE recommendations that were considered but not accepted by the IOU refer to the individual IE solicitation reports presented in Attachment II.

Table E.1: Key PRG Recommendations Not Adopted			
Solicitations	Topics	Recommendation	IOU Reason for Not Adopting
Local Commercial (Small and Large)	RFP Page Limits	Proposal templates do not include page limits, which complicates the review process because of the differential levels of detail provided by individual bidders and the challenges this poses to review team members.	Because the RFP form is Excel-based, page limits do not apply. The bidder can modify the cells to fit their response.

Table E.1: Key PRG Recommendations Not Adopted			
Solicitations	Topics	Recommendation	IOU Reason for Not Adopting
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Residential Single-Family, Local Public Sector K-12	RFA Requirements	The PRG did not support the bidder requirement to submit a Program Logic Model diagram at the RFA stage.	SDG&E prefers to retain the PLM diagram requirement because it helps evaluators understand the program design.

F. Stakeholder Feedback from CPUC Workshops

A public stakeholder meeting was held on July 11, 2019 to discuss feedback on the IOUs’ energy efficiency program solicitation activities from the bidder community and various other stakeholders. The main topics that were raised by stakeholders included the following:

- **Solicitation Complexity**—Some stakeholders suggested the IOU solicitation process favors larger firms because of the complexity of the solicitations and ability of these larger firms to meet the IOUs’ strict timelines and absorb contract risks.
- **Cost-Effectiveness**—Stakeholders indicated that there is insufficient training on the CPUC’s cost-effectiveness tool.

- **Program Innovation**—Stakeholders stated that increased innovation usually results in lower cost-effectiveness and wondered how the IOU’s are managing this.
- **Role of the Independent Evaluator**—Stakeholders inquired as to the role of IEs in the solicitation process. During the workshop, it was conveyed at the workshop that the IE role is to monitor the solicitation for fairness and equity. It was further clarified that the IEs also provides consultation to the PRGs.
- **Contract Terms**—Stakeholders wanted to understand the difference in contract terms. At the workshop, stakeholders were informed that the CPUC standard contract terms and conditions must be included in all contracts. The CPUC’s modifiable terms allow for more flexibility based on the type of solicitation and program (e.g., key performance indicators, etc.). D.18-10-008 and D.19-08-006 include the CPUC’s standard and modifiable contract terms and conditions.
- **Solicitation Improvements:** Stakeholders propose the following to improve the process:
 - Stagger RFPs and RFAs across IOUs.
 - Consider timing of workshops based on solicitation timelines.
 - Use a common response format for an RFP to scale across all IOUs.
 - Improve and add solicitation platforms (Proposal Evaluation and Proposal Management Application is a poor platform).
 - Allow more time in the RFP stage for bidders to prepare and submit a proposal (six weeks is too short given the RFP’s CET requirements).
 - Provide ongoing schedule updates.
 - Provide feedback to unsuccessful bidders.

Two main follow up items were allocated to Joint IOU/PRG/IE teams from the meeting to be addressed more specifically:

- Improved scheduling/timing of solicitations across the IOUs.
- Improved communications with bidders on outcomes of solicitations.

Responses to these two items, along with other stakeholder concerns, will be addressed at the next public workshop scheduled for February 2020.

II. Attachments: Individual IE Semi-Annual Solicitation Reports

Energy Efficiency Independent Evaluators' Semi-Annual Report on the

Local Small Commercial Solicitation

Reporting Period: May through October
2019

Prepared by:
The Mendota Group, LLC

December 31, 2019

Disclaimer: Certain portions of this report are redacted due to the sensitive nature of the information.

Local Small Commercial

1.1 Solicitation Overview

1.1.1 Overview

The Company's first set of solicitations focused on the commercial sector, which, according to the SDG&E Business Plan, accounts for approximately 43 percent of total electricity and 22 percent of total natural gas consumption among the Company's customer classes. Also, according to the Business Plan, the commercial sector is dominated by small commercial accounts. SDG&E's desired outcomes for its commercial EE programs are to help customers achieve Zero Net Energy (ZNE) by providing them greatly enhanced self-help tools, program options, and expert assistance.

During the period covered by this report, SDG&E was implementing the RFP stage of the Local Small Commercial solicitation. Therefore, unless specifically mentioned, all solicitation references in this report relate to the RFP stage. The RFA stage of the solicitation was covered in the June 2019 Semi-Annual Report. It should be noted that SDG&E ran its Small and Large Commercial solicitations in parallel, used similar template documents, and followed similar processes. Therefore, many of the items discussed in this report are similar to those discussed in the Large Commercial report.

Scope

As presented in the RFP, the IOU stated: SDG&E is seeking proposals from non-utility companies for energy efficiency programs to serve the Small Commercial Sector (non-residential customers under 20 kW⁵, excluding those in the Public Sector) for the 2020-2022 program years.

Objectives

The objective of the Solicitation is to implement third-party energy efficiency programs that reliably capture, and document cost effective energy (kWh, kW and/or therm) savings applicable to the Small Commercial Sector.

Table 1.1 provides a listing of the key milestones for the Large Commercial solicitation.

Table 1.1: Key Milestones	
Milestone	Completion Date
RFP Release	June 18, 2019
Proposals Submitted	August 27, 2019
Interviews	January 2020 (estimate)
Contract Negotiations	pending
Agreement(s) Signed	pending

⁵ Resolution E-4939, page 31 paragraph 1.

1.1.2 Timing

The Small Commercial solicitation is delayed.⁶ The RFP was released in June 2019 and interviews are currently scheduled for January 2020. The detailed timing of the Small Commercial solicitation is outlined in Table 1.1.

1.1.3 Key Observations

Table 1.2 Key Issues and Observations			
Topic	Observation	IE Recommendation(s)	Outcome (IOU Action /Response)
IE Pool Input	IEs have found that IOUs benefit from drawing on the collective wisdom of their IE pool for insights about ongoing solicitations.	SDG&E should adopt a practice of meeting regularly with its pool of IEs to leverage IE insights and observations about solicitations	SDG&E has adopted this practice since the last SAR and it is proving beneficial to its solicitation processes.
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
RFP Questions	The Offer Form requested that bidders provide responses to a large number of questions, some of which duplicated information in other questions and some which were less relevant to evaluation of the program.	The Offer Form should be revisited to reduce the number of questions and focus on the important information that bidders need to provide.	SDG&E has not adopted this recommendation.

⁶ Joint IOU Program Solicitations Schedule, dated December 2018. Subsequently, the IOUs updated the Joint IOU Program Solicitation Schedule to reflect changes to other solicitations. Solicitation schedules are updated periodically by the IOUs and the current schedule can be found at <https://www.caeccc.org>.

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

1.2 Solicitation Outreach and Bidder Response

1.1.1 Bidder Response to Solicitation

No outreach was conducted as the Small Commercial solicitation is in the RFP stage.

The solicitation outreach activities, communications, and solicitation design were originally addressed as part of the previous Semi-Annual Report and the IE continues to believe that they have resulted in a robust, competitive solicitation.

Table 2.1 displays solicitation responses for the RFP phase.

Table 2.1 Solicitation Response	
	Number
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]

There were no issues related to the bidder conference or bidder Q&A that arose during the RFP stage of the Small Commercial solicitation.

1.1.2 Bidder’s Conference and Q&A

SDG&E conducted a combined Large and Small Commercial RFP bidder conference using Skype for audio and visual and the Sli.do platform for bidders to ask questions in real-time. Sli.do allowed bidders to “up vote” questions in order to elevate questions in importance or indicate that more than one viewer had the same question.

SDG&E responded to bidders’ questions in a complete, accurate, and timely manner consistent with their solicitation schedule.

Table 2.2 Bidder Conferences	
	Information
Bidder Conference Date	July 2, 2019
No. of Attendees	Unknown, but 18 active Sli.do users in the joint Large and Small Commercial solicitation bidder conference
Number of Q&A Received	4

1.1.3 Solicitation Design Assessment

SDG&E’s solicitation design—to offer both Large and Small Commercial solicitations—is consistent with that proposed in its CPUC-approved Business Plan, Solicitation Plan, and ABAL.⁷

The Small Commercial solicitation has been conducted as a two-stage process, consistent with the CPUC’s Decision 18-01-004.

1.3 RFA and RFP Design and Materials Assessment

1.3.1 RFA Design Requirements and Materials

The RFA stage of the Small Commercial solicitation was addressed in the previous Semi-Annual Report.

1.3.2 RFP Design Requirements and Materials

For the RFP stage of the Small Commercial solicitation, SDG&E released a total of 10 documents to represent the RFP packet, including:

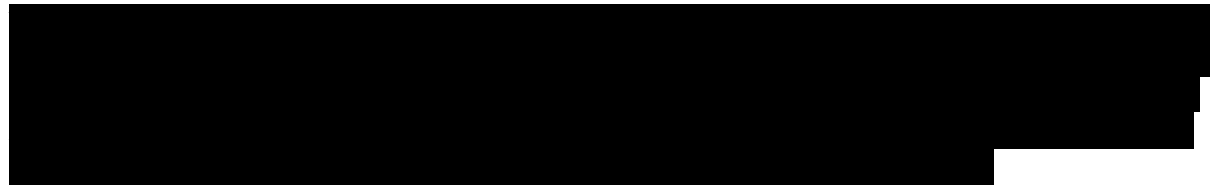
- Small Commercial RFP Instructions (information only)*
- Schedule A—SDG&E Additional Terms & Conditions (redlined)*
- Schedule A1—Standard (information only) and Modifiable (redlined) Terms & Conditions*
- Schedule B—RFP Form (template)*
- Schedule B1—RFP Logic Model (template – in PDF and Visio formats)
- Schedule C—RFP Submission Checklist (template)

⁷ D.18-05-041 adopted the IOU Business Plans.

- Schedule D1—CET input Sheet Measures (template)
- Schedule D2—CET Input Sheet Program Cost (template)
- Schedule E—Certificate of Insurance (example)
- Schedule F—DBE Goal Form (template)

The notation in parentheses indicates what the bidder needed to do with each document. After release, SDG&E provided amended versions of four of these documents, indicated above by an asterisk (*). The bidder was required to return each of the documents listed as a template. For Schedules D1 and D2, the bidder was required to submit a separate set of schedules for each program year represented in the proposal, as well as a CET Output file for each program year.

The IE believes that SDG&E provided as part of its RFP packet and requested back as part of the bidder proposal an appropriate number of documents, and thus that the solicitation was well-designed. During the RFP packet development, the IE provided extensive feedback that was well-addressed by SDG&E.



From the PRG, the Public Advocates Office (Cal Advocates or PAO), the Energy Division, and the Small Business Utility Advocates all provided comments on drafts of the RFP packet. SDG&E was very responsive to these comments overall and incorporated their recommendations accordingly.

1.3.3 Response to PRG and IE Advice

The following table describes the concerns raised by the IE and PRG regarding the design of the RFP packet and the IOU response to those concerns.

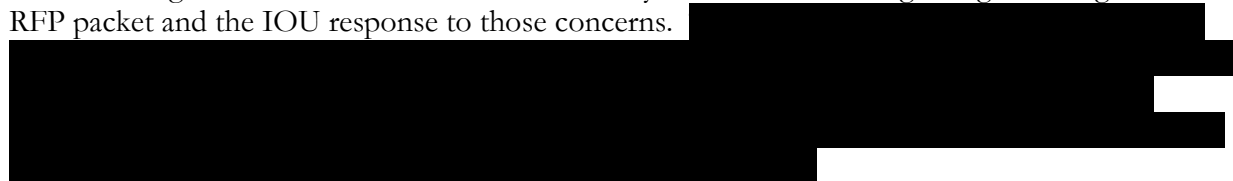


Table 3.3 Response to PRG Advice		
Issue	IOU Response	Raised By
Proposal Template Did Not Include Page Limits.	Because the RFP form is Excel-based, page limits do not apply. The bidder can modify the cells to fit their response.	PRG
[Redacted]	[Redacted]	[Redacted]

Table 3.3 Response to PRG Advice		
Issue	IOU Response	Raised By

1.4 Bid Evaluation Methodology Assessment

1.4.1 Bid Screening Process

[Redacted]

1.4.2 Scoring Rubric Design

Table 4.2 Scoring Rubric		
Category	Sub-Category	Weighting
[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]
	[Redacted]	[Redacted]
	[Redacted]	[Redacted]
	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]
	[Redacted]	[Redacted]
	[Redacted]	[Redacted]
	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]

[Redacted]

[Redacted]

[Redacted text block]

1.4.3 Evaluation Team Profile

[Redacted text block]

[Redacted text block]

[Redacted text block]

Table 4.3: IOU Evaluation Team		
Position Title	Position Role	Area(s) Scored
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]

Table 4.3: IOU Evaluation Team		
Position Title	Position Role	Area(s) Scored

1.5 Response to PRG and IE Advice

Not applicable to this reporting period.

1.6 Final Bid Selection Assessment

Not applicable to this reporting period.

1.6.1 Conformance with Established Evaluation Processes

The RFA stage of the Small Commercial solicitation was addressed in the previous Semi-Annual Report. For the RFP stage, SDG&E conducted its evaluation in conformance with the scoring criteria and the solicitation process presented to and approved by the PRG.

SDG&E did not receive any non-conforming bids in the RFP stage of the Small Commercial solicitation.

1.6.2 Management of Deficient Bids

SDG&E did not receive any deficient bids in the RFP stage of the Small Commercial solicitation.

1.6.3 Shortlist and Final Selections

Not applicable to this reporting period.

1.6.4 Affiliate Bids and Conflict of Interest

SDG&E required bidders to attest within Schedule C — RFP Proposal Checklist and Acknowledgement—that they are not an affiliate of another IOU and that the bidder has no affiliate relationships with SDG&E, either presently or within the previous six months. Further, SDG&E asked its proposal reviewers to self-attest that they had no conflict of interest with any of the bidders. None of the proposals received in the RFP stage were from an affiliate.

1.7 Assessment of Selected Bids

Not applicable for this reporting period.

1.8 Reasonableness of Contracting Process

Not applicable to this reporting period.

Energy Efficiency Independent Evaluators' Semi-Annual Report on the

Local Large Commercial Programs

San Diego Gas & Electric

Reporting Period: May through October 2019

Prepared by:

The Mendota Group, LLC

December 31, 2019

Disclaimer: Certain portions of this report are redacted due to the sensitive nature of the information.

Local Large Commercial

1.1. Solicitation Overview

1.1.1 Overview

The Company's first set of solicitations focused on the commercial sector, which, according to the SDG&E Business Plan, accounts for approximately 43 percent of total electricity and 22 percent of total natural gas consumption among the Company's customer classes. SDG&E's desired outcomes for its commercial EE programs are to help customers achieve ZNE by providing them greatly enhanced self-help tools, program options, and expert assistance.

During the period covered by this report, SDG&E was implementing the RFP stage of the Local Small Commercial solicitation. Therefore, unless specifically mentioned, all solicitation references in this report relate to the RFP stage. The RFA stage of the solicitation was covered in the June 2019 Semi-Annual Report. It should be noted that SDG&E ran its Small and Large Commercial solicitations in parallel, used similar template documents, and followed similar processes. Therefore, many of the items discussed in this report are similar to those discussed in the Small Commercial report.

Scope

As presented in the RFP, the IOU stated: Company is seeking proposals from non-utility companies for energy efficiency programs to serve the Large Commercial Sector (non-residential customers above 20 kW⁸, excluding those in the Public Sector) for the 2020-2022 program years.

Objectives

The objective of the Solicitation is to implement third-party energy efficiency programs that reliably capture and document cost effective energy (kWh, kW and/or therm) savings applicable to the Large Commercial Sector.

Table 1.1 provides a listing of the key milestones for the Large Commercial solicitation.

Table 1.1: Key Milestones	
Milestones	Completion Date
RFP Release	June 18, 2019
Proposals Submitted	August 27, 2019
Interviews	January 2020 (estimate)
Contract Negotiations	pending
Agreement(s) Signed	pending

⁸ Resolution E-4939, page 31 paragraph 1

1.1.2 Timing

The Large Commercial solicitation is delayed.⁹ The RFP was released in June 2019 and interviews are currently scheduled for January 2020. The detailed timing of the Small Commercial solicitation is outlined in Table 1.1.

1.1.3 Key Observations

Table 1.2 Key Issues and Observations			
Topic	Observation	IE Recommendation(s)	Outcome (IOU Action /Response)
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
RFP Questions	The Offer Form requested that bidders provide responses to a large number of questions, some of which duplicated information in other questions and some which was less relevant to evaluation of the program.	The Offer Form should be revisited to reduce the number of questions and focus on the important information that bidders need to provide.	SDG&E has worked to reduce the number of questions.
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

⁹ Joint IOU Program Solicitations Schedule, dated December 2018. Subsequently, the IOUs updated the Joint IOU Program Solicitation Schedule to reflect changes to other solicitations. Solicitation schedules are updated periodically by the IOUs and the current schedule can be found at <https://www.caeecc.org>.

1.2 Solicitation Outreach and Bidder Response

1.2.1 Bidder Response to Solicitation

No outreach was conducted as the Large Commercial solicitation is in the RFP stage.

The solicitation outreach activities, communications, and solicitation design were originally addressed as part of the previous Report and the IE continues to believe that they have resulted in a robust, competitive solicitation.

Table 2.1 displays solicitation responses for the RFP phase.

Table 2.1 Solicitation Response	
	Number
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]

There were no issues related to the bidder conference or bidder Q&A that arose during the RFP stage of the Large Commercial solicitation.

1.2.2 Bidder's Conference and Q&A

SDG&E conducted a combined Large and Small Commercial RFP bidder conference using Skype for audio and visual and the Sli.do platform for bidders to ask questions in real-time. Sli.do allowed bidders to “up vote” questions in order to elevate questions in importance or indicate that more than one viewer had the same question.

SDG&E responded to bidders’ questions in a complete, accurate, and timely manner consistent with their solicitation schedule.

Table 2.2 Bidder Conferences	
Bidder Conference Date	July 2, 2019
No. of Attendees	Unknown, but 18 active Sli.do users in the joint Large and Small Commercial solicitation Bidder Conference
No. of Q&A Received	20

1.2.3 Solicitation Design Assessment

SDG&E's solicitation design—to offer both Large and Small Commercial solicitations—is consistent with that proposed in its CPUC-approved Business Plan, Solicitation Plan, and ABAL.¹⁰

The Large Commercial solicitation has been conducted as a two-stage process, consistent with the Decision 18-01-004.

1.3 RFA and RFP Design and Materials Assessment

1.3.1 RFA Design Requirements and Materials

The RFA stage of the Large Commercial solicitation was addressed in the previous Semi-Annual Report.

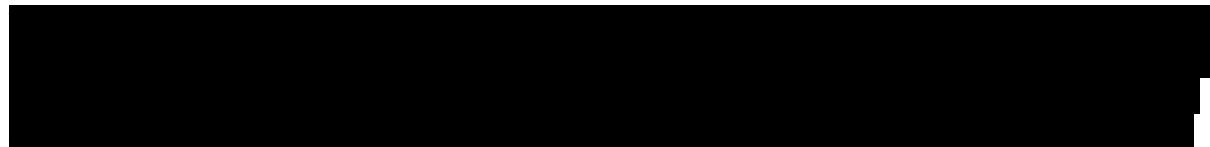
1.3.2 RFP Design Requirements and Materials

For the RFP stage of the Large Commercial solicitation, SDG&E released a total of 10 documents to represent the RFP packet, including:

- Large Commercial RFP Instructions (information only)*
- Schedule A—SDG&E Additional Terms & Conditions (redlined)*
- Schedule A1—Standard (information only) and Modifiable (redlined) Terms & Conditions*
- Schedule B—RFP Form (template)*
- Schedule B1—RFP Logic Model (template – in pdf and Visio formats)
- Schedule C—RFP Submission Checklist (template)
- Schedule D1—CET input Sheet Measures (template)
- Schedule D2—CET Input Sheet ProgramCost (template)
- Schedule E—Certificate of Insurance (example)
- Schedule F—DBE Goal Form (template)

The notation in parentheses indicates what the bidder needed to do with each document. After release, SDG&E provided amended versions of four of these documents, indicated above by an asterisk (*). The bidder was required to return each of the documents listed as a template. For Schedules D1 and D2, the bidder was required to submit a separate set of schedules for each program year represented in the proposal, as well as a CET Output file for each program year.

The IE believes that SDG&E provided as part of its RFP packet and requested back as part of the bidder proposal an appropriate number of documents, and thus that the solicitation was well-designed. During the RFP packet development, the IE provided extensive feedback that was well-addressed by SDG&E.



¹⁰ D.18-05-041 adopted the IOU Business Plans.

[REDACTED]

From the PRG, the Public Advocates Office (Cal Advocates), the Energy Division, and the Small Business Utility Advocates all provided comments on drafts of the RFP packet. SDG&E was very responsive to these comments overall and incorporated their recommendations accordingly.

1.3.3 Response to PRG and IE Advice

The following table describes the concerns raised by the IE and PRG regarding the design of the RFP packet and the IOU response to those concerns. [REDACTED]

Table 3.3 Response to PRG and IE Advice		
Issue	IOU Response	Raised By
Proposal Template Did Not Include Page Limits.	Because the RFP form is Excel-based, page limits do not apply. The bidder is able to modify the cells to fit their response.	PRG
[REDACTED]	[REDACTED]	[REDACTED]

1.4 Bid Evaluation Methodology Assessment

1.4.1 Bid Screening Process

[REDACTED]

1.4.2 Scoring Rubric Design

Table 4.2 Scoring Rubric		
Category	Sub-Category	Weighting
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]

Table 4.2 Scoring Rubric

Category	Sub-Category	Weighting
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]

100%

[Redacted]

[Redacted]

[Redacted]

[Redacted]

1.4.3 Evaluation Team Profile

[Redacted]

[Redacted]

[REDACTED]

Table 4.3: IOU Evaluation Team		
Position Title	Position Role	Area(s) Scored
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]

1.5 Response to PRG and IE Advice

Not applicable to this reporting period.

1.6 Final Bid Selection Assessment

1.6.1 Conformance with Established Evaluation Processes

The RFA stage of the Large Commercial solicitation was addressed in the previous Semi-Annual Report. [REDACTED]

[REDACTED]

[REDACTED]

1.6.2 Management of Deficient Bids

SDG&E did not receive any deficient bids in the RFP stage of the Large Commercial solicitation.

1.6.3 Shortlist and Final Selections

Not applicable to this reporting period.

1.6.4 Affiliate Bids and Conflict of Interest

SDG&E required bidders to attest within Schedule C—the RFP Proposal Checklist and Acknowledgement that they are not an affiliate of another IOU and that bidder has no affiliate relationships with SDG&E, either presently or within the previous six months. Further, SDG&E asked its proposal reviewers to self-attest that they had no conflict of interest with any of the bidders. None of the proposals received in the RFP stage were from an affiliate.

1.7 Assessment of Selected Bids

1.7.1 Bid Selections Respond to Portfolio Needs

The RFA shortlist was addressed in the previous Semi-Annual Report. [REDACTED]

1.7.2 Bid Selections Provide Best Overall Value to Ratepayers

Not applicable to this reporting period.

1.8 Reasonableness of Contracting Process

Not applicable to this reporting period.

Energy Efficiency Independent Evaluators' Semi-Annual Report on the

Local Multi-Family Residential

Reporting Period: May through October 2019

Prepared by:
MCR Corporate Services

December 31, 2019

Disclaimer: Certain portions of this report are redacted due to the sensitive nature of the information.

Local Multi-Family Residential

1.1 Solicitation Overview

1.1.1 Overview

Scope

SDG&E is offering this solicitation to implement third-party energy efficiency programs that reliably capture and document deep, durable, comprehensive, and cost-effective energy (kWh, kW and/or therm) savings applicable to the Residential Multi-Family Sector.

Objectives

The purpose of this RFA is to identify a turn-key solution(s) to address the Residential Multi-Family market segment goals in SDG&E's Energy Efficiency Business Plan. In addition to providing a path to ZNE, SDG&E is seeking a comprehensive approach that may include but is not limited to the following elements:

- Benchmarking
- Audits
- Marketing, education, and outreach
- A common pathway for customers via a single point of contact
- Collection and utilization of renter feedback
- Development of bill neutral Energy Efficiency financing tool¹¹

Milestones	Expected Completion Date	Actual Completion Date	Comment
RFP Released	June 18, 2019	June 18, 2019	
Optional Bidder Conference	June 28, 2019	June 28, 2019	
Proposals Due in PowerAdvocate	August 28, 2019	August 28, 2019	
Bidder Interviews	November 20-26	pending	Delayed approximately to early January 2020
Notification of Selection	December 5, 2019	pending	Delayed
Contract Development	December 13, 2019– February 24, 2020	pending	Delayed
Advice Letter Filing to CPUC	April 2020	pending	Delayed

1.1.2 Timing

The Joint IOU solicitation timeline presented on the [California Energy Efficiency Coordinating Committee \(CAEECC\) site](#) indicates the timeline for SDG&E's Residential Multi-Family RFP is April 2019–June 2020. [REDACTED]

¹¹ RFA Schedule B.

[REDACTED] The bidder interviews, originally scheduled for late November 2019, are tentatively planned for early January 2020. As a result, it appears that the solicitation’s timeline might be pushed into at least July 2020.

1.1.3 Key Observations

Table 1.2 Key Issues and Observations			
Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Contract Template	Recreating contract documents is not an effective use of time. Suggest leveraging a standard document.	Leverage the IE pool to develop a contract template.	SDG&E has not adopted this practice.

Table 1.2 Key Issues and Observations

Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
Solicitation Schedule and PRG Feedback	The IOU schedule does not always consider overlaps with other IOU's PRGs and PRG may become a bottleneck to provide feedback. Consequently, PRG comments that are received after the expected review time can cause challenges for IOU attempting to maintain solicitation schedules.	IOU should continue to update its solicitation schedule that allocates time for PRG feedback. If comments will not be provided according to the current timelines, reviewer should inform IOU and IE that comments are coming and provide expected date of delivery. Late comments may result from EE PRG members having to review too many solicitations in limited amount of time.	The IOU has strived to develop an updated schedule. PRG members have notified SDG&E for late feedback. Additional communication has taken place to discuss expectations during PRG meetings and schedules have been adjusted.
PRG Should Adhere to Review Timelines or Revise Process	PRG comments that are received after the expected review time can cause challenges for IOUs/IEs attempting to maintain solicitation schedules.	If comments will not be provided according to the current timelines, reviewer should inform IOU and IE that comments are coming and provide expected date of delivery. Late comments may result from EE PRG members having to review too many solicitations in limited amount of time.	Not adopted by the PRG. Review times are a moving target.
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

1.2 Solicitation Outreach and Bidder Response

1.2.1 Bidder Response to Solicitation

[REDACTED]

[REDACTED]



Table 2.1 Solicitation Response	
	No.
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]



1.2.2 Bidder’s Conference and Q&A

SDG&E held a proposal bidders’ conference on June 28, 2019, after releasing its RFP on June 18, 2019. The conference went smoothly, with no technical issues. Due to the nature of the conference’s technical arrangements, it was not necessary for attendees to sign into the conference with personal information (e.g., email address). As a result, it was impossible to ascertain exactly how many bidders were in attendance.

There were two rounds of bidder questions associated with the bidders’ conference:

- Twenty-one questions were received during the bidders’ conference on June 28, 2019. SDG&E responded to those questions on time on July 18, 2019 via PowerAdvocate.
- Ten additional questions were received between July 15, 2019 and August 5, 2019. SDG&E responded to those questions on time on August 9, 2019 via PowerAdvocate.

The IE reviewed all SDG&E’s responses to bidder questions for accuracy, clarity, and impartiality prior to being sent back to the bidders. The IE recommended revisions to the responses to a few questions to ensure clarity.

Table 2.2 Bidder Conferences	
	Date / No.
Bidder Conference	June 28, 2019
No. of Attendees	Unknown
No. of Q&A Received	31

1.2.3 Solicitation Design Assessment

SDG&E specifically identified the multi-family residential sector as a major focus for its residential energy efficiency efforts. SDG&E’s Energy Efficiency Business Plan 2018-2025 (January 2017) identifies on page 52, Residential Goal #2 as “increase energy efficiency participation multi-family sector.” Further, SDG&E identified several barriers to this goal in its Business Plan, which the bidders were asked to address as part of their RFA and RFP responses. SDG&E’s Business Plan

also specified residential sector metrics that the bidders were encouraged to use in their submittals.



1.3 RFA and RFP Design and Materials Assessment

1.3.1 RFA Design Requirements and Materials

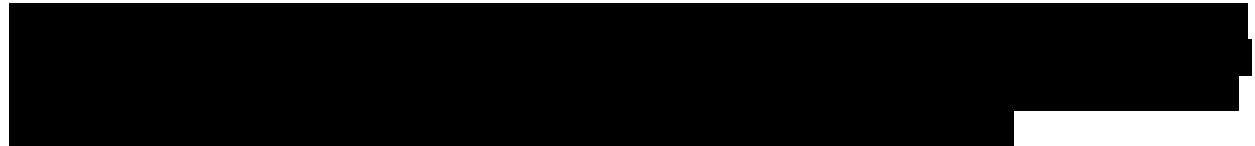
The RFA design requirements for this solicitation fall in the previous reporting period and include a brief background here. Despite being early in the process, the RFA documents for the Multi-Family solicitation were generally in good shape from the beginning. The following sections highlight the IE’s document review findings and recommendations for the three major RFA documents: Request for Abstract, Scope of Work, and Evaluator Scoring Workbook.

Request for Abstract

The RFA was brief and generally very clear, and the IE believes these characteristics served to encourage, rather than discourage, responses from bidders. They also potentially reduced questions from bidders later in the process. Further, SDG&E added references to external documents (SDG&E’s Business Plan, CPUC Decisions, and Legislative Acts) included in many cases the specific pages/sections where the relevant information could be found and was very helpful and served to encourage responses.

Scope of Work

The information requested by the Statement of Work (SOW) was appropriate for the RFA stage with regards to level of detail and qualitative vs. quantitative information. The SOW was developed keeping the business plan in mind and described the solicitation’s need for bidders to respond.



[Redacted]

[Redacted]

[Redacted]

[Redacted]

1.3.2 RFP Design Requirements and Materials

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

1.3.3 Response to PRG and IE Advice

[Redacted]

Source of Recommendation	Number of Recommendations	Recommendations Accepted	Recommendations Not Accepted	Other*
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

1.4 Bid Evaluation Methodology Assessment



1.4.1 Bid Screening Process

SDG&E disseminates and receives all bid-specific information through PowerAdvocate. With PowerAdvocate, SDG&E can determine whether the bidder has met its pass/fail criteria, which were clearly stated in at least two of the RFA documents:

- Did the bidder submit materials on-time via PowerAdvocate?
- Did the bidder follow RFA instructions by:
 - Complying with page limits
 - Submitting mandatory attachments
 - Completing key tables
 - Providing a proposal that could be reasonably scored
 - Submitting no password-protected documents

SDG&E used the same pass/fail criteria in the proposal phase as in the abstract phase.

1.4.2 Scoring Rubric Design



Table 5.2 Scoring Rubric			
Category	Sub-Category	Number of Questions	Weighting
[Redacted]	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	[Redacted]	[Redacted]
			100%

[Redacted]

[Redacted]

[Redacted]

[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

Table 4.3: IOU Evaluation Team		
Position Title	Position Role	Areas Scored
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]

1.5 Response to PRG and IE Advice

[Redacted]

[Redacted]

[Redacted]

1.6 Final Bid Selection Assessment

1.6.1 Conformance with Established Evaluation Processes

[Redacted]

[Redacted]

[Redacted]

[Redacted]

1.6.2 Management of Deficient Bids

Not applicable for this reporting period.

1.6.3 Shortlist and Final Selections

Not applicable for this reporting period.

1.6.4 Affiliate Bids and Conflict of Interest

SDG&E specifically asks bidders in both the abstract and proposal phases to declare if they are an affiliate. Using bidder-provided information, SDG&E also researches the bidder's corporate connections. SDG&E's evaluators are also screened to ensure that they have no potential conflicts

[Redacted]

of interest with any of the known bidders.

For the Multi-Family solicitation SDG&E neither received any bids either during the abstract or proposal phases from affiliated bidders nor identified any conflicts of interest with any employees associated with the solicitation.

1.7 Assessment of Selected Bids

Not applicable for this reporting period.

1.8 Reasonableness of Contracting Process

Not applicable for this reporting period.

Energy Efficiency Independent Evaluators' Semi-Annual Report on the

Statewide Plug Load and Appliance Solicitation

Reporting Period: May through October 2019

Prepared by:
Don Arambula Consulting

December 31, 2019

Disclaimer: Certain portions of this report are redacted due to the sensitive nature of the information.

Statewide Plug Load and Appliance

1.1 Solicitation Overview

1.1.1 Overview

Scope

SDG&E is seeking abstracts from third-party program implementers who wish to offer a comprehensive, innovative, and cost-effective turn-key Statewide Plug Load and Appliance (PLA) energy efficiency resource program for residential applications.

Objectives

Cost effectiveness is an important element of all programs in the California IOU's EE program portfolios. The proposed program should help the IOUs achieve related portfolio goals and metrics. The proposed program should provide energy savings for electric and/or natural gas (therm) for Program Years 2021 through 2023. The targeted annual budget for this program will not exceed \$29,000,000, which may be divided among multiple winning Implementers. bidders may submit abstracts proposing subprograms. However, the solicitation will not award overlapping program designs delivered in the same geographical area. Bidder may submit multiple bids to this solicitation, however, each bid must be unique.

1.1.2 Timing

The Residential Plug Load and Appliance program solicitation was initially scheduled for release in Quarter 1 of 2019 as shown in the IOU Joint Solicitation Schedule presented to the bidder community on the [CAEECC site](#) in December 2018. The solicitation schedule was later revised by SDG&E in 2019. The RFA was released in May 2019. The IOU did not provide a reason as to why the solicitation was delayed. The Joint IOU Solicitation Schedule has been subsequently updated to reflect the revised RFA release date. The solicitation timing of other major milestones is consistent with the revised Joint IOU Solicitation Schedule. Below is a list of key solicitation milestones and expected completion dates. Unless otherwise noted, all milestone dates as of this reporting period were met or on schedule.

Table 1.1 Key Milestones	
Milestones	Expected Completion Date
RFA Stage	
1. RFA Released by Company	May 10, 2019
2. Bidder Conference	May 20, 2019
3. Bidder Questions Due	May 31, 2019
4. Responses to Bidder Questions	June 7, 2019
5. Bidder Submittal Due Date	June 21, 2019
6. Evaluation of Submittals	June 24 - September 20, 2019
7. Calibration Meeting Held	July 20 - July 21, 2019
8. Shortlist Meeting Held	August 22, 2019
9. Shortlist Presented to PRG	September 9, 2019
7. Selected Bidders are notified of advancement to RFP, Stage 2	September 9, 2019
RFP Stage (Schedule is pending revisions)	

Table 1.1 Key Milestones	
Milestones	Expected Completion Date
1. RFP Released	December 13, 2019
2. Bidder Conference (Skype)	January 10, 2020
3. Bidder Questions Due Round 1	January 7, 2020
4. Responses to Bidder Questions Provided by Company Round 1	January 14, 2020
4. Bidder Questions Due Round 2	February 5, 2020
5. Responses to Bidder Questions Provided by Company Round 2	February 12, 2020
6. Bidder's Proposal Due in PowerAdvocate	April 4, 2020
6. Proposal Review and Bid Clarification Discussions	April 6, 2020–July 17, 2020
7. Proposal Review Period Ends - Bidders Notified	August 17, 2020
Selections & Contracting Stage (Pending)	
1. Notification of Proposal Selection (Subject to Negotiations)	August 17, 2020
2. Contract Development, Contract Negotiation	August 18– September 14, 2020
3. PRG Review	September 24–30, 2020
4. Company's Advice Letter Filing to CPUC	October 2020
5. Contract Issued (subject to CPUC approval, if applicable)	November 2020
6. Program Ramp-Up Begins	Quarter 4 2020
7. Full Program Roll Out	Quarter 1 2021

1.1.3 Key Observations

Table 1.2 Key Issues and Observations			
Topic	Observations	IE Recommendations	Outcomes (IOU Action/Response)
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Table 1.2 Key Issues and Observations			
Topic	Observations	IE Recommendations	Outcomes (IOU Action/Response)
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Table 1.2 Key Issues and Observations			
Topic	Observations	IE Recommendations	Outcomes (IOU Action/Response)
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Continuous Improvement	The IOU should hold a debriefing session with its scoring team to identify what worked well and what did not in the bid evaluation process. For future solicitations, the team should identify areas of improvement with the RFA/RFP evaluation process including the team's calibration meeting.	Debriefing sessions help to identify and address issues which support an environment of continuous improvement. Debriefing sessions should be held soon after the completion of the selection process.	SDG&E does not hold debriefing sessions. No reason provided.

Table 1.2 Key Issues and Observations			
Topic	Observations	IE Recommendations	Outcomes (IOU Action/Response)
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Table 1.2 Key Issues and Observations			
Topic	Observations	IE Recommendations	Outcomes (IOU Action/Response)
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Reduce Solicitation Timelines	The IOU should revisit its solicitation schedule and reduce the timelines associated with various schedule milestones. For example, the IOU allowed 13 weeks to evaluate and select abstracts. [REDACTED]	The IOU should strive to reduce the solicitation timeline. The PRG should also provide timely review and input that supports more aggressive timelines.	The IOU is currently reviewing solicitation schedules to identify improvements to the overall timing and completion of the solicitations. To date, no significant reductions to the timeline have been made to this solicitation.

1.2 Solicitation Outreach and Bidder Response

1.2.1 Bidder Response to Solicitation

The solicitation outreach relied on general awareness of SDG&E’s program solicitations to the bidder community through several announcements and IOU-specific workshops regarding SDG&E’s upcoming energy efficiency program solicitations. SDG&E also posted information onto its [Energy Efficiency Third Party Solicitations site](#) and the [CAEECC site](#).

Bidder response to the RFA is consistent with SDG&E’s expected response rate. The following are the results of SDG&E’s program solicitation thus far:

Table 2.1: Solicitation Response	
	No.

1.2.2 Bidder's Conference and Q&A

RFA

SDG&E held a Bidders' Conference on May 20, 2019. Potential bidders had ample time during the conference to ask questions. Bidders were also provided an opportunity after the Bidders' Conference to provide written questions. These written questions were due to SDG&E by May 31, 2019. SDG&E received eight questions covering an array of topics including: program coverage, program measure mix, marketplace, and branding. SDG&E provided responses to all bidder questions by June 7, 2019, which is within the acceptable parameters recommended by the PRG.

Table 2.2: Bidder Conferences	
Bidder Conference Date	May 20, 2019
No. of Attendees	unknown
No. of Q&A Received	8

RFP

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

1.2.3 Solicitation Design Assessment

The solicitation design met SDG&E's intended need to procure a resource-based program(s) targeted at the plug load and appliance energy efficiency end-users across all California investor-owned utilities. SDG&E's vision is to select comprehensive and innovative initiatives that reduce energy usage across technologies with high savings potential to meet this growing demand. The proposed Program must target residential plug load and appliance end-use technologies and should be generally offered uniformly Statewide. Consistent with CPUC Decision 16-08-019, "Local or regional variations in incentive levels, measure eligibility or program interface are not generally permissible (except for measures that are weather dependent or when the program administrator has provided evidence that the default Statewide customer interface is not successful in a particular location)."

The scoring rubric and corresponding scorecard directly supports SDG&E's intended need of the Statewide PLA program. The evaluation scorecard is designed to evaluate program design that can offer PLA solutions.

SDG&E's program solicitation conforms to the CPUC requirements for a competitive, two-stage solicitation with oversight from its PRG and active monitoring of all solicitation activities by the IE.

1.3 RFA and RFP Design and Materials Assessment

1.3.1 RFA Design Requirements and Materials

[REDACTED]

[REDACTED]

1.3.2 RFP Design Requirements and Materials

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

1.3.3 Response to PRG and IE Advice

RFA

[REDACTED]

[REDACTED]

¹³ D.15-10-028 (Appendix 4, p. 2)

[Redacted]

RFP

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

1.4 Bid Evaluation Methodology Assessment

1.4.1 Bid Screening Process

RFA

[Redacted]

RFP

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

1.4.2 Scoring Rubric Design

RFA

[Redacted]

Table 4.2 Scoring Rubric	
Category	Weighting
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
[Redacted]	[Redacted]
100%	

[Redacted]

[Redacted]

[Redacted]

RFP

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

1.4.3 Evaluation Team Profile

RFA

[Redacted]

[Redacted]

[Redacted]

Table 4.3: IOU Evaluation Team			
Team Number	Position Title	Position Responsibilities	Area Scored
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]

RFP

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

1.5 Response to PRG and IE Advice

RFP

[REDACTED]

RFP

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

1.6 Final Bid Selection Assessment

1.6.1 Conformance with Established Evaluation Processes

RFA

[REDACTED]

RFP

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

1.6.2 Management of Deficient Bids

RFA

Consistent with the RFA instructions, the IOU did not take any actions to rectify any deficiencies associated with bids during the evaluation process. SDG&E management of deficient bids was fair and reasonable.

RFP

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

1.6.3 Shortlist and Final Selections

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

1.6.1 Affiliate Bids and Conflict of Interest

RFA

The IOU did not receive a bid from an affiliate nor identified a conflict of interest (COI) with a member of the evaluation team. The IOU conducts a review as part of its bid screening process to confirm there are no COI occurrences nor affiliate submissions. SDG&E properly conducted this screening process.

RFP

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

1.7 Assessment of Selected Bids

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

1.8 Reasonableness of Contracting Process

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

Energy Efficiency Independent Evaluators'
Semi-Annual Report on the

Statewide Upstream/Midstream HVAC Solicitation

Reporting Period: May through October
2019

Prepared by:
The Mendota Group, LLC

December 31, 2019

Disclaimer: Certain portions of this report are redacted due to the sensitive nature of the information.

Statewide Upstream/Midstream HVAC

1.1 Solicitation Overview

SDG&E's first Statewide solicitation is the Statewide Upstream and Midstream Heating, Ventilation and Cooling (HVAC) Program. During the period covered by this report, SDG&E was implementing the RFP stage of the Statewide HVAC solicitation. Therefore, unless specifically mentioned, all solicitation references in this report relate to the RFP stage. The RFA stage of the solicitation was covered in the June 2019 Semi-Annual Report.

1.1.1 Overview

Pursuant to CPUC Decision 18-05-041, SDG&E, on behalf of the Statewide IOUs¹⁴, is seeking bids from Third-Party EE Implementers to design, propose, and implement Statewide¹⁵ upstream Heating, Ventilation and Air Conditioning (HVAC) program(s).

Scope

The scope of the Statewide HVAC program includes one or more programs that primarily use upstream and midstream delivery channels (a limited amount of downstream is permitted) to deliver reliable, cost effective heating, ventilation and air conditioning energy (kWh, kW, and therm) savings in the residential and commercial sectors. The program does not include designs that address HVAC needs of the Industrial and Agricultural sectors for process heating or cooling. The annual budget for the three-year contract is designated not to exceed \$23,000,000, which may be divided among multiple winning bidders.

Objectives

The solicitation's objective is to select one or more bidders to implement Statewide third-party energy efficiency programs that, on behalf of the Statewide IOUs, reliably capture and document cost effective energy (kWh, kW and/or therm) savings for heating, ventilation, and air conditioning end uses in residential and commercial applications.

Table 1.1 provides a listing of the key milestones for the Statewide HVAC solicitation.

Milestone	Completion Date
RFP Release	September 4, 2019
Proposals Submitted	October 14, 2019
Scoring	October 17 to December 30, 2019
Shortlisting	pending
Interviews	pending
Contract Negotiations	pending
Agreement(s) Signed	pending

¹⁴ Statewide IOUs and service territories include PG&E, SCE, SDG&E & SoCalGas also referenced in this report as "Program Administrators" or "PAs."

¹⁵ The CPUC defines the term "Statewide" in Ordering Paragraph 5 of D.16-08-019.

1.1.2 Timing

The Statewide HVAC solicitation is on track.¹⁶ The RFP was released in September 2019 and interviews are anticipated in Q1 2020. The detailed timing of the Statewide HVAC solicitation is outlined in Table 1.1.

1.1.3 Key Observations

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

¹⁶ Joint IOU Program Solicitations Schedule, dated December 2018. Subsequently, the IOUs updated the Joint IOU Program Solicitation Schedule to reflect changes to other solicitations. Solicitation schedules are updated periodically by the IOUs and the current schedule can be found at www.caeecc.org.

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

1.2 Solicitation Outreach and Bidder Response

1.2.1 Bidder Response to Solicitation

No outreach was conducted because the Statewide HVAC solicitation is in the RFP stage.

The solicitation outreach activities, communications, and solicitation design were originally addressed as part of the previous Semi-Annual Report and the IE continues to believe that they have resulted in a robust, competitive solicitation.

Table 2.1 displays solicitation responses for the RFP phase.

Table 2.1 Solicitation Response	
Solicitation Stage	Number
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]

[REDACTED]



1.2.2 Bidder's Conference and Q&A

SDG&E conducted a Statewide HVAC bidder conference using Sli.do platform both for broadcasting the presentation and for bidders to ask questions in real-time. Bidders were invited to attend in person or to participate through the platform. Sli.do allows bidders to “up vote” questions in order to elevate questions in importance or indicate that more than one viewer had the same question. Bidders posed a number of questions, related to budgets, file format, and cost effectiveness targets. SDG&E was able to answer these questions during the conference. All bidders had representatives in attendance.

SDG&E provided bidders two rounds of questions and responded to bidders’ questions in a complete, accurate, and timely manner. Altogether, bidders submitted approximately 37 questions on a broad range of topics.

Table 2.2 Bidder Conference	
	Information
Bidder Conference Date	September 16, 2019
No. of Attendees	Two in-person participants and, at peak, 42 active Sli.do participants
Number of Q&A	Bidders posed 13 questions during bidder Conference

1.2.3 Solicitation Design Assessment



1.3 RFA and RFP Design and Materials Assessment

1.3.1 RFA Design Requirements and Materials

The RFA stage of the Small Commercial solicitation was addressed in the previous Semi-Annual Report.

1.3.2 RFP Design Requirements and Materials

For the RFP stage of the Statewide HVAC solicitation, SDG&E included 10 documents in its RFP packet, including:

- Statewide HVAC RFP Instructions (information only)*
- Schedule A—Redline of SDG&E Additional Terms and Conditions (requests redlines)
- Schedule A1— Standard Contract Terms (information only) and Redline of Required Modifiable Contract Terms and Conditions (requests redlines);
- Schedule B—RFP Proposal Form (template)*
- Schedule B1—RFP Final Logic Model (template—in pdf and Visio formats)
- Schedule C—RFP Submission Checklist (template)
- Schedule D1—CET input Sheet Measures (template)
- Schedule D2—CET Input Sheet Program Cost (template)
- Schedule E—Certificate of Insurance (example)
- Schedule F—DBE Goal Form (template)

The information in parentheses indicates what the bidder needed to do with each document. After release, SDG&E provided amended versions of two of these documents, indicated above by an asterisk (*). Bidders were required to return each of the documents listed as a template. For Schedules D1 and D2, the bidder was required to submit a separate set of schedules for each program year represented in the proposal, as well as a CET output file for each program year.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

1.4 Bid Evaluation Methodology Assessment

1.4.1 Bid Screening Process

SDG&E performed a Threshold Assessment in which the company evaluated proposal responsiveness, including whether bidder followed RFP instructions, submitted mandatory schedules, provided all required information as requested and in PowerAdvocate, and provided a

proposal that could be reasonably scored. The RFP clearly presented this information to bidders.

1.4.2 Scoring Rubric Design

Table 4.2 Scoring Rubric		
Category	Sub-Category	Weighting
[REDACTED]	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]
	[REDACTED]	[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

1.4.3 Evaluation Team Profile

[Redacted text block]

[Redacted text block]

[Redacted text block]

Table 4.3: IOU Evaluation Team		
Position Title	Position Role	Area(s) Scored
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]

[Redacted text block]

1.5 Response to PRG and IE Advice

Not applicable for this reporting period.

1.6 Final Bid Selection Assessment

Not applicable for this reporting period.

1.6.1 Conformance with Established Evaluation Processes

The RFA stage of the Statewide HVAC solicitation was addressed in the previous Semi-Annual Report. SDG&E is still in the process of reviewing proposals submitted in response to the RFP.

SDG&E did not receive any non-conforming bids in the RFP stage of the Statewide HVAC solicitation.

1.6.2 Management of Deficient Bids

SDG&E did not receive any deficient bids in the RFP stage of the Statewide HVAC solicitation.

1.6.3 Shortlist and Final Selections

Not applicable for this reporting period.

1.6.4 Affiliate Bids and Conflict of Interest

SDG&E required bidders to attest within Schedule C—the RFP Proposal Checklist and Acknowledgement that they are not an affiliate of another IOU and that bidder has no affiliate relationships with SDG&E, either presently or within the previous six months. Further, SDG&E asked its proposal reviewers to self-attest that they had no conflict of interest with any of the bidders. None of the proposals received in the RFP stage were from an affiliate of the IOU.

1.7 Assessment of Selected Bids

SDG&E did not select any bids in the Statewide HVAC solicitation during the period covered by this Semi-Annual Report.

1.7.1 Bid Selections Respond to Portfolio Needs

The RFA shortlist was addressed in the previous Semi-Annual Report. SDG&E has not yet completed the scoring process for the RFP stage of the Statewide HVAC solicitation.

1.7.2 Bid Selections Provide Best Overall Value to Ratepayers

Not applicable for this reporting period.

1.8 Reasonableness of Contracting Process

Not applicable for this reporting period.

Energy Efficiency Independent Evaluators'
Semi-Annual Report on the

**Local Public Sector K-12 Programs
Solicitation**

Reporting Period: May 2019 through
October 2019

Prepared by:
MCR Corporate Services

December 31, 2019

Disclaimer: Certain portions of this report are redacted due to the sensitive nature of the information.

Local Public Sector K-12

1.1. Solicitation Overview

1.1.1 Overview

Scope

SDG&E is looking for a comprehensive solution that provides a path to ZNE for public sector customers. In addition to providing a path to ZNE, SDG&E is seeking a comprehensive program approach that may include but is not limited to the following elements:

- Benchmarking
- Audits
- Measure Implementation
- Marketing Education & Outreach
- Financing
- Workforce Education & Training

Furthermore, SDG&E is searching for a turn-key solution to address the Public Sector goals. The Public Sector goals are stated on page 96 of SDG&E's Business Plan, and then discussed in further detail throughout the Public chapter. These goals are designed to directly address the needs of most SDG&E's public customers.

The Public Sector includes the K-12 Public Schools sub-sector consisting of 46 school districts across SDG&E's territory that represent 12 percent of billed electric consumption and four percent of billed therm consumption. While these statistics are meaningful, the public sector has high visibility and influence within the customer base.

Because the K-12 Public Schools sector has never been broken out separately before, it is important to understand how it is not only unique from other sectors but also has unique challenges. Examples of existing challenges include (but are not limited to) the following:

- Long approval processes including Division of the State Architect (DSA) and board approvals
- Complex funding mechanisms and budgetary constraints
- Timing interventions with school breaks
- Security within school campuses
- Peak hour usage within K-12 facilities

Objectives

SDG&E is seeking comprehensive and innovative EE Program Abstracts from non-utility companies for the Public Sector serving K-12 customers. The K-12 sub-sector is comprised of public schools and public charter schools that service grades K-12. The objective of the solicitation is to implement third-party EE programs that reliably capture, and document cost effective energy (kWh, kW and/or therm) savings applicable to the Public Sector K-12 customers. Cost

effectiveness is an important element of all programs in the California IOU portfolios. The proposed Program should help the IOUs achieve related portfolio goals and metrics.

The proposed Program should provide energy savings for electric (kWh, kW) and/or natural gas (therm) for Program Years 2021 through 2025 (the last two years are potential contract extension years). Annual budget range proposed should be between \$2.2 million and \$3.2 million, which may be divided among multiple winning Implementers.

Table 1.1: Key Milestones			
Milestones	Expected Completion Date	Actual Completion Date	Comment
RFA Released	October 14, 2019	October 16, 2019	Provided PRG additional time to review final RFA package
Optional Bidder Web Conference	October 29, 2019	October 29, 2019	On time
Questions Due from Bidders	November 13, 2019	Pending as of October 31, 2019	
Responses Provided by SDG&E	November 20, 2019	Pending as of October 31, 2019	
Bidder Abstracts Due	November 27, 2019	Pending as of October 31, 2019	
Selected Bidders Notified of Advancement to Stage 2	February 21, 2020	N/A	
RFP Released	April 29, 2020	N/A	
Optional Bidder Conference	May 22, 2020	N/A	
Bidder's Proposal Due	July 16, 2020	N/A	
Selected Bidder Interviews	September 2020	N/A	
Proposal Review Period Ends – Bidders Notified	October 19, 2020	N/A	

1.1.2 Timing

The Joint IOU solicitation timeline presented on the CAEECC website indicates SDG&E's Public K-12 RFA prep would occur in July-September 2019 and RFA process in October 2019-January 2020. SDG&E's solicitation timing is consistent with the Joint IOU schedule. See Table 1.1 above.

1.1.3 Key Observations

Table 1.2 Key Issues and Observations			
Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
Program Overview	Bidders would benefit from having helpful references included in the RFA itself.	Add references from the Business Plan and CPUC Decisions for easy reference.	SDG&E included sector barriers and goals from Business Plan as well as links to all CPUC.

Table 1.2 Key Issues and Observations			
Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
			decisions
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

1.2 Solicitation Outreach and Bidder Response

1.2.1 Bidder Response to Solicitation

As of this reporting period, SDG&E launched its RFA on October 16, 2019 and held its Bidder Conference (see below), but the results of the solicitation are not known at this time. [REDACTED]

Table 2.1 Solicitation Response	
	No.
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]

1.2.2 Bidder's Conference and Q&A

SDG&E held a Bidder's Conference on October 29, 2019. There were 50 participants from 26 organizations, and 58 potential bidders registered for the solicitation in PowerAdvocate.

¹⁸ 55 potential bidders registered in PowerAdvocate; abstracts due November 27, 2019.

The Bidder’s Conference went smoothly, and SDG&E had several members of the organization present various pieces of information, which was very helpful. The only technical issue was a challenge with the sound at the beginning of the webinar, but it was quickly corrected by SDG&E.

SDG&E provided solicitation background, described the road to 60 percent, introduced the solicitation team, shared an overview of the public sector, discussed goals and items for bidders to consider. SDG&E also presented both its RFA and RFP solicitation timelines. Team members walked bidders through PowerAdvocate, introduced the documents in the RFA package, discussed the proposal structure and offer form, and indicated what SDG&E is looking for from this solicitation. Finally, SDG&E shared resources for bidders and provided tips for bidders to be successful. SDG&E closed with a question and answer period.

SDG&E received 20 questions during the Bidder’s Conference. The questions were primarily process questions. Bidders also asked about match making opportunities, SDG&E’s definition of ZNE, whether fuel substitution measures will be accepted, and whether SDG&E would be providing a deemed measure workbook that gives energy savings values for specific measures. In addition, SDG&E received two questions in PowerAdvocate. The IE reviewed SDG&E’s responses to bidder questions for accuracy, clarity and impartiality and suggested some revisions to ensure clarity prior to SDG&E posting the responses to PowerAdvocate.

Table 2.2 Bidder Conferences	
	No.
Bidder Conference	October 29
No. of Attendees	50 ¹⁹
No. of Q&A Received	20 ²⁰

1.2.3 Solicitation Design Assessment

SDG&E devoted a chapter of its Energy Efficiency Business Plan 2018-2025 (January 2017) to defining the opportunities and challenges of the Public Sector. One of SDG&E’s stated goals is to “eliminate barriers to public sector participation by developing tailored solutions and financing options.”²¹ The RFA asks bidders to address the barriers as part of their RFA responses.

The Business Plan’s three goals for this sector are:

- Education—Empower Leaders by equipping them with knowledge and tools to make informed EE decisions.
- Penetration—Eliminate Barriers to Public Sector Participation by developing tailored solutions and financing options.
- Savings—Influence Private Sector EE Activities through reach codes and engagement.

SDG&E is conducting this public sector solicitation using the two-stage process, consistent with the CPUC’s Decision D.18-05-041. The first stage (“Stage 1”) is an RFA, which was issued on October

²⁰ The deadline for bidders’ questions had not closed as of the drafting of this report.

²¹ SDG&E Energy Efficiency Business Plan 2018-2025, January 2017, at pp. 6-7.

16, 2019. If the Bidder is successful in Stage 1 RFA, Bidder will be asked to submit and participate in Stage 2 RFP, where SDG&E will request additional and specific details regarding the information provided in Stage 1 RFA.²²

1.3 RFA and RFP Design and Materials Assessment

1.3.1 RFA Design Requirements and Materials

SDG&E developed the RFA based on previous solicitations and incorporated lessons learned from prior solicitations. [REDACTED]

Program Overview

[REDACTED]

Program Design

The Program Design section of the RFA includes language from Decision18-05-041 on Design of Incentives to Customer and Implementers to allow bidders to describe how their incentive design aligns with CPUC decision language.

Compliance

The Compliance section includes specific questions on legislative drivers, workforce standards, hard-to-reach and disadvantaged communities, and IDSMS.

Innovation

[REDACTED]

1.3.2 RFP Design Requirements and Materials

Not Applicable for this reporting period.

1.3.3 Response to PRG and IE Advice

SDG&E has been very responsive to recommendations by the IE and PRG regarding RFA design. [REDACTED]

²² SDG&E Public Sector K-12 Request for Abstract, at p. 3.

[Redacted]

[Redacted]

1.4 Bid Evaluation Methodology Assessment

1.4.1 Bid Screening Process

[Redacted]

1.4.2 Scoring Rubric Design

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

²³ SDG&E language in PRG tab of Comment Tracker

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[REDACTED]

[REDACTED]

[REDACTED]

Table 4.2 Scoring Rubric			
Category	Sub-Category	Number of Questions	Weighting
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

1.4.3 Evaluation Team Profile

Not applicable for this reporting period.

1.5 Response to PRG and IE Advice

See Section 1.4.2 above which describes IE, PRG and IOU discussions regarding bid evaluation

methodology.

Not applicable for this reporting period.

1.6 Final Bid Selection Assessment

Not applicable for this reporting period.

1.7 Assessment of Selected Bids

Not applicable for this reporting period.

1.8 Reasonableness of Contracting Process

Not applicable for this reporting period.

Energy Efficiency Independent Evaluators'
Semi-Annual Report on the

Local Public Sector Federal Programs Solicitation

Reporting Period: May through October
2019

Prepared by:
MCR Corporate Services

December 31, 2019

Disclaimer: Certain portions of this report are redacted due to the sensitive nature of the information.

Local Public Sector Federal

1.1. Solicitation Overview

1.1.1 Overview

Scope

San Diego Gas and Electric (SDG&E) is looking for a comprehensive solution that provides a path to ZNE for customers in the public sector. The Public Sector is defined as a group of customers that are tax-payer-funded, have political mandates, and that must go through a public budgeting and decision-making process.

The Public Sector makes up twelve percent of electric consumption with 70 percent of accounts under 20 kW within SDG&E's service territory. In 2013-2015, SDGE's natural gas savings almost all came from the Commercial and Public sectors with Public comprising 48 percent of average consumption and only 18 percent energy efficiency portfolio spending for the same timeframe. The Public Sector includes the Federal sub-sector that represent 47 percent of billed electric consumption and 22 percent of billed therm consumption.

The public sector has high visibility and influence within the customer base and poses unique challenges as these entities are expected to lead by example within their own facilities, responsible for developing and enforcing code, as well as creating policies and enforcing mandates throughout the state. This sub-sector is often underfunded, understaffed and entails complex funding mechanisms and approval processes.

In addition to providing a path to ZNE, SDG&E is seeking a comprehensive Program approach that may include but is not limited to the following elements:

- Benchmarking
- Audits
- Measure Implementation
- Marketing Education and Outreach (ME&O)
- Financing
- Workforce Education & Training

Furthermore, SDG&E is searching for a turn-key solution to address the Public Sector goals.²⁴ SDG&E is seeking comprehensive and innovative EE Program abstracts from non-utility companies for the Public Sector serving federal customers. The Federal sub-sector is comprised of federal Buildings, US Postal Service, hospitals (only those owned and/or operated by the federal government), military bases and tribal nations.

Objectives

The objectives of the solicitation are to solicit innovative approaches to augment the federal government's own energy and sustainability programs and to implement third-party EE programs

²⁴ SDG&E Business Plan at p. 96 and in Public Sector chapter.

(“Programs”) that reliably capture, and document cost effective energy (kWh, kW and/or therm) savings applicable to the Public Sector-Federal customers. Cost effectiveness is an important element of all programs in the California IOU portfolios. The proposed Program should help the IOUs achieve related portfolio goals and metrics.

The proposed Program should provide energy savings for electric (kWh, kW) and/or natural gas (therm) for Program Years 2021 through 2025 (the last two years are potential contract extension years). The targeted annual budget for this program should be between \$3.7 million and \$5.5 million, which may be divided among multiple winning Implementers.

Table 1.1: Key Milestones			
Milestones	Expected Completion Date	Actual Completion Date	Comment
RFA Released	October 14, 2019	October 16, 2019	Provided PRG additional time to review final RFA package
Optional Bidder Web Conference	October 29, 2019	October 29, 2019	All went as planned
Questions Due from Bidders	November 13, 2019	pending	
Responses Provided by SDG&E	November 20, 2019	pending	
Bidder Abstracts Due	November 27, 2019	pending	
Selected Bidders Notified of Advancement to Stage 2	February 21, 2020	pending	
RFP Released	April 29, 2020	pending	
Optional Bidder Conference	May 22, 2020	pending	
Bidder’s Proposal Due	July 16, 2020	pending	
Selected Bidder Interviews	September 2020	pending	
Proposal Review Period Ends – Bidders Notified	October 19, 2020	pending	

1.1.2 Timing

The Joint IOU solicitation timeline presented on the CAEECC website indicates SDG&E’s Public Federal RFA Prep would occur in July-September 2019 and RFA process in October 2019-January 2020. SDG&E’s solicitation timing is consistent with the Joint IOU schedule. See Table 1.1 above.

1.1.3 Key Observations

Table 1.2 Key Issues and Observations			
Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
Program Overview	Bidders would benefit from having helpful references included in the RFA itself.	Add references from the Business Plan and CPUC Decisions for easy reference.	SDG&E Included sector barriers and goals from Business Plan as well as links to all CPUC decisions.
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

1.2 Solicitation Outreach and Bidder Response

1.2.1 Bidder Response to Solicitation

As of this reporting period, SDG&E launched its RFA and held its Bidder Conference (see below), but the results of the solicitation are not known at this time. However, 55 potential bidders have registered for the solicitation in PowerAdvocate.

Table 2.1 Solicitation Response	
	No.
Abstracts Expected	7-15 ²⁵
Abstracts Received	Abstracts due November 13, 2019
Abstracts Disqualified	0
Proposals Expected	N/A
Proposals Received	N/A
Proposals Disqualified	N/A

1.2.2 Bidder's Conference and Q&A

SDG&E held a Bidder's Conference on October 29, 2019. There were 50 participants from 26 organizations, and 55 potential bidders have registered for the solicitation in PowerAdvocate.

The Bidder's Conference went smoothly, and SDG&E had several members of the organization present various pieces of the information, which was very helpful. The only technical issue was a challenge with the sound at the beginning of the webinar, but it was quickly corrected by SDG&E.

SDG&E provided solicitation background, described the road to 60 percent, introduced the solicitation team, shared an overview of the public sector, discussed goals and items for bidders to consider. SDG&E also presented both its RFA and RFP solicitation timelines. Team members walked bidders through PowerAdvocate, introduced the documents in the RFA package, discussed the proposal structure and offer form, and indicated what SDG&E is looking for from this solicitation. Finally, SDG&E shared resources for bidders and provided tips for bidders to be successful. SDG&E closed with a question and answer period.

SDG&E received 20 questions during the Bidder's Conference. The questions were primarily process questions. Bidders also asked about match making opportunities, SDG&E's definition of ZNE, whether fuel substitution measures will be accepted, and whether SDG&E would be providing a deemed measure workbook that gives energy savings values for specific measures. In addition, SDG&E received two questions in PowerAdvocate. The IE reviewed SDG&E's responses to bidder questions for accuracy, clarity and impartiality and suggested some revisions to ensure clarity prior to SDG&E posting the responses to PowerAdvocate on November 1. Bidders have until November 13 to request additional information.

Table 2.2 Bidder Conferences	
Bidder Conference	October 29, 2019
No. of Attendees	50 ²⁶
No. of Q&A Received	20 ²⁷

1.2.3 Solicitation Design Assessment

²⁵ 55 potential bidders registered in PowerAdvocate; abstracts due November 27, 2019.

²⁷ The deadline for bidders' questions had not closed as of the drafting of this report.

SDG&E devoted a chapter of its Energy Efficiency Business Plan 2018-2025 (January 2017) to defining the opportunities and challenges of the Public Sector. One of SDG&E's stated goals is to "eliminate barriers to public sector participation by developing tailored solutions and financing options."²⁸ The RFA asks bidders to address the barriers as part of their RFA responses.

The Business Plan's three goals for this sector are:

- Education—Empower leaders by equipping them with knowledge and tools to make informed EE decisions.
- Penetration—Eliminate barriers to Public Sector participation by developing tailored solutions and financing options.
- Savings—Influence private sector EE Activities through reach codes and engagement.

SDG&E is conducting this public sector solicitation using the two-stage process, consistent with the CPUC's Decision D.18-05-041. The first stage ("Stage 1") is an RFA, which was issued on October 16, 2019. If the Bidder is successful in Stage 1 RFA, Bidder will be asked to submit and participate in Stage 2 RFP, where SDG&E will request additional and specific details regarding the information provided in Stage 1 RFA.²⁹

1.3 RFA and RFP Design and Materials Assessment

1.3.1 RFA Design Requirements and Materials

SDG&E developed the RFA based on previous solicitations and incorporated lessons learned from prior solicitations. [REDACTED]

Program Overview

Based on IE feedback, SDG&E incorporated references in the Program Overview section of its RFA to SDG&E's Business Plan, a list of specific Barriers identified in the Business Plan and specific goals from the Business Plan. This is a significant improvement.

Program Design:

The Program Design section of the RFA includes language from Decision 18-05-041 on Design of Incentives to Customer and Implementers to allow bidders to describe how their incentive design aligns with CPUC decision language.

Compliance

The Compliance section includes specific questions on legislative drivers, workforce standards, hard-to-reach and disadvantaged communities, and IDSMS.

Innovation

²⁸ SDG&E Energy Efficiency Business Plan 2018-2025, January 2017, at pp. 6-7.

²⁹ SDG&E Public Sector Federal Request for Abstract, at p. 3.

[Redacted]

1.3.2 RFP Design Requirements and Materials

Not applicable for this reporting period.

1.3.3 Response to PRG and IE Advice

[Redacted]

[Redacted]

1.4 Bid Evaluation Methodology Assessment

1.4.1 Bid Screening Process

[Redacted]

1.4.2 Scoring Rubric Design

[Redacted]

[Redacted]

³⁰ SDG&E language in PRG tab of Comment Tracker.

[REDACTED]

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Table 4.2 Scoring Rubric			
Category	Sub-Category	Number of Questions	Weighting

1.4.3 Evaluation Team Profile

Not applicable for this reporting period.

1.5 Response to PRG and IE Advice

Not applicable for this reporting period.

1.6 Final Bid Selection Assessment

Not Applicable for this reporting period.

1.7 Assessment of Selected Bids

Not Applicable for this reporting period.

1.8 Reasonableness of Contracting Process

Not applicable for this reporting period.

Energy Efficiency Independent Evaluators'
Semi-Annual Report on the

Local Residential Single-Family Solicitation

Reporting Period: May through October
2019

Prepared by:
Don Arambula Consulting

December 31, 2019

Disclaimer: Certain portions of this report are redacted due to the sensitive nature of the information.

Local Residential Single-Family

1.1. Solicitation Overview

1.1.1 Overview

Scope

The Local Residential Single-Family program solicitation is seeking comprehensive and innovative EE Programs targeted at SDG&E's Residential Single-Family customers. The SDG&E Residential Single-Family market segment is defined as residential customers who own or rent a single-family detached home or a residential building with two to four units.

Objectives

The objective of the Local Residential Single-Family solicitation is to fund a third-party energy efficiency program(s) that can reliably capture energy savings from SDG&E's Residential Single-Family customers. The proposed Program should provide electric and/or natural gas energy savings. The contract will be a three-year agreement with the opportunity for two one-year extensions, not to exceed a five-year agreement. The annual budget will have a not-to-exceed amount of \$1.9 million per year and may be divided among multiple program implementers.

Milestones	Expected Completion Date	Actual Completion Date
RFA Stage		
1. RFA Released	October 18, 2019	October 18, 2019
2. Optional Bidder Conference	November 4, 2019	pending
3. Bidder Questions Due	November 19, 2019	pending
4. Responses to Bidder Questions Due	November 26, 2019	pending
5. Bidder Abstract Submission Due	December 5, 2019	pending
6. Submittal Review	December 6, 2019–February 7, 2020	pending
7. Calibration Meeting	pending	pending
8. Shortlist Meeting	pending	pending
9. Selection Presentation to PRG	pending	pending
10. Bidders Notified - Advancement to RFP Stage	February 27, 2020	pending
RFP Stage		
1. RFP Released	May 5, 2020	pending
2. Optional Bidder Conference	May 29, 2020	pending
3. Bidder Questions Due - Round 1	June 12, 2020	pending
4. Responses to Bidder Questions - Round 1	June 19, 2020	pending
3. Bidder Questions Due - Round 2	July 6, 2020	pending
4. Responses to Bidder Questions - Round 2	July 13, 2020	pending
5. Bidder's Proposal Due Date in PowerAdvocate	July 22, 2020	pending
6. Proposal Review, Bid Clarification Discussions	July 17, 2020–August 18, 2020	pending
7. Selected Bidder Interviews	September 29, 2020–October 5, 2020	pending
8. Calibration Meeting	pending	pending
9. Shortlist Meeting	pending	Pending
10. Selection Presentation to PRG	pending	pending

Milestones	Expected Completion Date	Actual Completion Date
11. Proposal Review Period Ends, Bidders Notified	October 19, 2020	pending
Selection & Contracting Stage		
1. Notification Selection (Subject to Negotiations)	October 19, 2020	pending
2. Contract Development and Negotiation	Q4 2020	pending
3. PRG/IE Review of Contract	Q1 2021	pending
4. Company's Advice Letter Filing to CPUC	Q1 2021	pending
5. Contract Issued (CPUC approval, if applicable)	Q2 2021	pending
6. Program Ramp-Up Begins	Q2 2021	pending
7. Full Program Roll Out	Q3 2021	pending

1.1.2 Timing

The Local Residential Single-Family program solicitation was initially scheduled for release in Quarter 1 of 2019 as shown in the IOU Joint Solicitation Schedule presented to the Bidder community on the [CAEECC site](#) in December 2018. The solicitation schedule was later revised, and the RFA was released in October 2019. The Joint IOU Solicitation Schedule has been subsequently updated to reflect the revised RFA release date. The solicitation timing of other major milestones is consistent with the revised Joint IOU Solicitation Schedule.

1.1.3 Key Observations

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

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

Table 1.2 Key Issues and Observations			
Topic	Observation	IE Recommendation(s)	Outcome (IOU Action/Response)
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Reduce Solicitation Timelines	The IOU should revisit its solicitation schedule and reduce the timelines associated with various schedule milestones.	The IOU should strive to reduce the solicitation timeline. The PRG should also provide timely review and input that supports more aggressive timelines.	The IOU is currently reviewing solicitation schedules to identify improvements to the overall timing and completion of the solicitations. To date, no significant reductions to the timeline have been made to this solicitation.

1.2 Solicitation Outreach and Bidder Response

1.2.1 Bidder Response to Solicitation

The solicitation outreach relied on general awareness of SDG&E’s program solicitations to the bidder community through several announcements and IOU-specific workshops regarding SDG&E’s upcoming energy efficiency program solicitations. SDG&E also posted information onto its [Energy Efficiency Third Party Solicitations site](#) and the [CAEECC site](#).



Table 2.1: Solicitation Response		No.
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]

Table 2.1: Solicitation Response	
	No.

1.2.2 Bidder's Conference and Q&A

RFA and RFP

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

1.2.3 Solicitation Design Assessment

RFA

The solicitation design met SDG&E's need to procure a resource-based program(s) targeted at the residential single-family customer segment in SDG&E's service territory. As presented in SDG&E's Energy Efficiency Business Plan³¹ and reflected in the solicitation RFA³², SDG&E's Residential Single-Family market segment (owners & renters) accounts make up 65 percent of the 1.3 million accounts within SDG&E's service territory, represents 76 percent of residential electric consumption and 77 percent of residential gas consumption. Within the single-family segment, approximately 20 percent are rental properties. Based on these percentages, along with associated data showing that the single-family owners participate at a higher rate in programs, it is critical to continue to engage this segment with highly targeted offerings; specifically, when considering being ZNE-ready within the Residential Sector. SDG&E's RFA also provided Bidders to several reference documents to help inform them of the existing market, legislative drivers, and regulatory policies and compliance requirements.³³

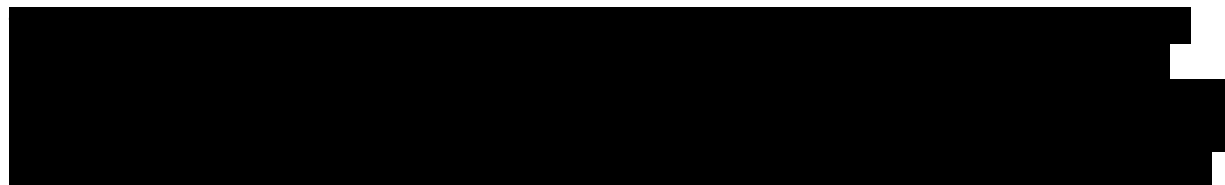
SDG&E's program solicitation conforms to the CPUC requirements for a competitive, two-stage solicitation with oversight from its PRG and active monitoring of all solicitation activities by the IE.

RFP

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

1.3 RFA and RFP Design and Materials Assessment

1.3.1 RFA Design Requirements and Materials



³¹ SDG&E's Energy Efficiency Business Plan (2018-2025), January 2017, pp. 41-42.

³² Residential Single Family – Request for Abstract, issued October 18, 2019, Section 2, Introduction, pp. 4-5.

³³ Id, Appendices – Resources & References.

[Redacted]

[Redacted]

1.3.2 RFP Design Requirements and Materials

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

1.3.3 Response to PRG and IE Advice

RFA

[Redacted]

[Redacted]

[Redacted]

RFP

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

1.4 Bid Evaluation Methodology Assessment

³⁴ D.15-10-028 (Appendix 4, p.2)

1.4.1 Bid Screening Process

RFA and RFP

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

1.4.2 Scoring Rubric Design

RFA



Category		Weighting

RFP

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

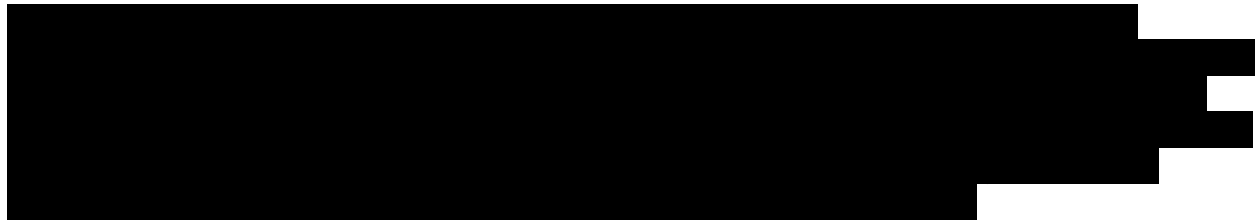
1.4.3 Evaluation Team Profile

RFA and RFP

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

1.5 Response to PRG and IE Advice

RFA



³⁵ D.18-05-041, Attachment A.



RFP

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

1.6 Final Bid Selection Assessment

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

1.7 Assessment of Selected Bids

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

1.8 Reasonableness of Contracting Process

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