

Please note: In general, a 1-star rating represents a poor rating, while 5-stars represents an excellent rating (select n/a if the question is not applicable to your firm).

Section 1: Improvements Implementers Have Seen and Would Like to See

- The IOUs all have very different RFP requirements and documents. Would it be helpful for the IOUs to develop a standard RFP template?**

1-star if it is not very helpful, 5-stars it would be very helpful.

1★	2★	3★	4★	5★	n/a
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.

- Are your programs using On-Bill Financing? If not, why?**

Yes	No	n/a
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.

- Do you prefer the solicitation process to contain a single-stage (RFP only) or two-stages (RFA & RFP), assuming that the two-stage process provides a very simple RFA?**

1-stage	2-stage
<input checked="" type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.

- How would you rate the unsuccessful bidder's debriefing meetings?**

1-star they have not been very helpful, 5-stars very helpful.

1★	2★	3★	4★	5★	n/a
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.

This is very dependent on the utility and in some cases the person at the utility providing the feedback. One utility in particular has routinely not answered any questions posed.

- During contract negotiations have you seen some flexibility from the IOUs to include optional payment structures to help with start-up costs? Relaxation that you can propose something. Really hopeful based on some recent language in RFPs that risks can be shared between 3Ps and IOUs. Skin in the game by the IOUs.**

Yes	No	n/a
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.
Within the last year, yes.

6. A) Do you believe that the Q&A process provides clarity and direct answers to a bidder's questions? **Potential is more important than just reading the RFP requirements of the RFP. Some specific information need more segment information.**

1-star does not provide clarity/answers, 5-stars provides great clarity/answers.

1★	2★	3★	4★	5★	n/a
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.
Often not- and the reading aloud of power point slides during initial QA meetings is close to never helpful

- B) Would you like to see more information on segment-specific data? (For example, if you are bidding an Industrial program, would it be helpful to break out the Industrial segment NAICS codes, customer size and customer count)?

Yes	No	n/a
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.

7. If applicable, how have IOUs handled coordination on Statewide programs (e.g. customer data access, OBF policies/processing, custom review process consistency, etc.):

1-star is no coordination, 5-stars is great coordination.

1★	2★	3★	4★	5★	n/a
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.
The lack of direction from CPUC on establishing clear rules for the oversight of statewide programs and directing the utilities to perform this on their own has not resulted in meaningful coordination of effort. The treatment of custom review process remains inconsistent across utilities and is dependent upon the internal policies and capabilities of each utility.

8. IOU and Bidder's Asymmetry:

a. Do you believe information asymmetry exists in the bidding process between IOUs and bidders?

1-star does not exist, 5-stars very much exists.

1★	2★	3★	4★	5★	n/a
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.

b. Does this impact bidders negatively?

1-star not impactful, 5-stars very impactful.

1★	2★	3★	4★	5★	n/a
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 2: How are Implementers and IOUs Aligning with CPUC Policies in the New EE Business Cycle (e.g. TSB, paying on TSB, TRC for Resource Acquisition)?

9. Total System Benefit (TSB):

a. In recent RFPs, have you seen a shift from reporting results on TSB versus first year energy savings?

Yes	No	n/a
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.

b. Are you seeing a shift in RFPs to partial or full pay-for-performance (PFP payments) based on TSB?

Yes	No	n/a
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.

c. When designing your program, have you moved away from first year energy savings to TSB?

Yes	No	n/a
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.

10. Do you believe that both reporting on TSB and getting compensated for TSB, but still having a TRC greater than 1.0 is:

a. Working.

1-star is not working, 5-stars is working great.

1★	2★	3★	4★	5★	n/a
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.

Too early to tell. It certainly makes it more difficult to hit both TRC & TSB. The real challenge will come as TSB values flux with their inputs.

b. Limits your flexibility to design innovative programs.

Yes	No	n/a
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.

- c. Is there another method other than TRC (e.g. PAC) that could protect ratepayers from overspending on EE projects?

Yes	No	n/a
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

If yes, please suggest an alternative method here

11. Avoided Cost Calculator (ACC) Updates:

- a. While implementing your program, have you been negatively or positively impacted by an ACC update?

Pos.	Neg.	n/a
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.

In most cases ACC Updates have negatively impacted- this will become more true in the future as TSB values include ACC.

- b. If you were impacted, did this affect your program design?

Yes	No	n/a
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.

- c. If you were impacted, did this affect your IOU contract?

Yes	No	n/a
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.

12. Have you seen an improvement or streamlining of the Custom Review Process or attempts to work with the implementers?

1-star has not improved at all, 5-stars has greatly improved recently.

1★	2★	3★	4★	5★	n/a
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.

13. Net-to-Gross Ratios (NTG): Do you feel that your program's NTG ratio is appropriate for your program/segment?

Yes	No	n/a
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.
With the advent and use of TSB, NTG should be removed.

14. General Policy Observations:

a. Are policy issues affecting your company from effectively doing business in California and bringing innovative programs into the market?

1-star is greatly affecting our work in CA, 5-stars is not affecting our work in CA.

1★	2★	3★	4★	5★	n/a
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Enter an any additional comments here.

b. What policies or processes are most concerning to you or need improvement in CA?

Please enter your response here.