

Third Party Solicitations Update

Full Quarterly CA Energy Efficiency Coordinating Committee Meeting
December 6th, 2018



Presented by: Angela Taglinao (SCE)

Overview of 3P Solicitation Schedule

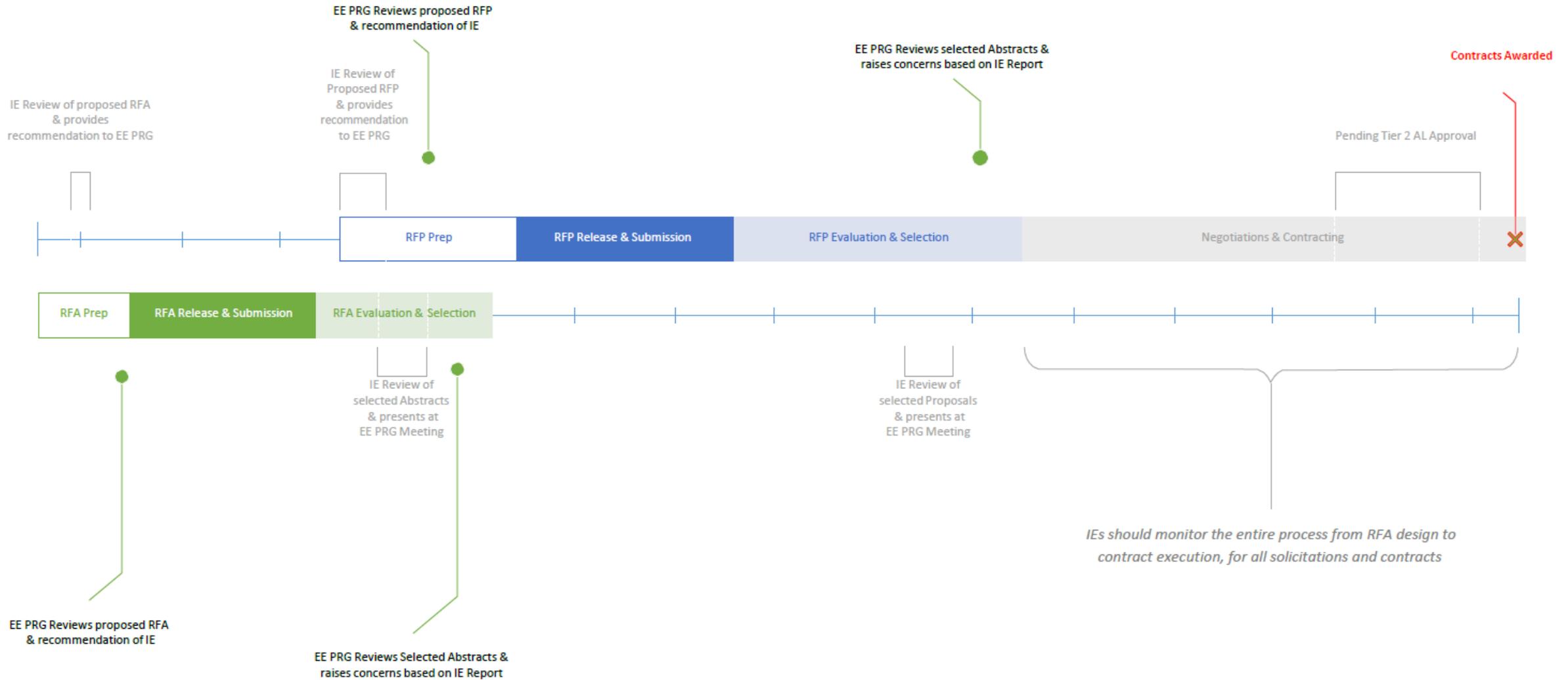
IOU	SW/Local	Sector	Description	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
PG&E	Local	Residential	Residential Sector RFA/RFP	RFA		RFP		Launch												
PG&E	Local	Commercial	Commercial Sector RFA/RFP	RFA		RFP		Launch												
PG&E	Local	Industrial	Industrial Sector RFA/RFP	RFA		RFP		Launch												
PG&E	Local	Agricultural	Agricultural Sector RFA/RFP	RFA		RFP		Launch												
PG&E	Local	Public	Public Sector RFA/RFP	RFA		RFP		Launch												
PG&E	SW	Residential	Residential New Construction		RFA		RFP			Launch										
PG&E	SW	Commercial	Non-Residential New Construction		RFA		RFP			Launch										
PG&E	SW	Cross-cutting	WE&T Career and Workforce Readiness			RFA		RFP				Launch								
PG&E	SW	Cross-cutting	WE&T K-12 Connections			RFA		RFP				Launch								
PG&E	SW	Public	State of CA / Dept. of Corrections				RFA			RFP										Launch
PG&E	SW	Cross-cutting	Codes & Standards - Appliance Standards				RFA			RFP										Launch
PG&E	Local	Residential	Residential RFP					RFA		RFP										Launch
PG&E	Local	Commercial	Commercial RFP					RFA		RFP										Launch
PG&E	Local	Industrial	Industrial RFP					RFA		RFP										Launch
PG&E	Local	Agricultural	Agricultural RFP					RFA		RFP										Launch
PG&E	Local	Public	Public Sector RFP					RFA		RFP										Launch
PG&E	Local	Residential	Residential RFP													RFA		RFP		Launch
PG&E	Local	Commercial	Commercial RFP													RFA		RFP		Launch
PG&E	Local	Industrial	Industrial RFP													RFA		RFP		Launch
PG&E	Local	Agricultural	Agricultural RFP													RFA		RFP		Launch
PG&E	Local	Public	Public Sector RFP													RFA		RFP		Launch
SCE	Local	Commercial	Commercial	RFA		RFP		Launch												
SCE	Local	Industrial	Industrial	RFA		RFP		Launch												
SCE	Local	Residential	Residential	RFA		RFP		Launch												
SCE	SW	Residential, Commercial, Industrial, Agricultural, Public	SW - Lighting Program	RFA		RFP		Launch												
SCE	Local	Public	Public Sector		RFA		RFP			Launch										
SCE	SW	Public	SW - Gov. & Inst. Partnerships and Water/Wastewater Pumping		RFA		RFP			Launch										
SCE	SW	Crosscutting	Electric Emerging Technologies		RFA		RFP			Launch										
SCE	Local	Agricultural	Agricultural				RFA			RFP										Launch
SCE	Local		Future Targeted RFPs as Needed (per RFA results)						RFA											
SDG&E	Local	Commercial	Small (<20kW)	RFA		RFP		Launch												
SDG&E	Local	Commercial	Large (>20kW)	RFA		RFP		Launch												
SDG&E	Local	Residential	Multi-Family	RFA		RFP		Launch												
SDG&E	SW	Commercial/Residential	Commercial/Residential HVAC		RFA		RFP													Launch
SDG&E	SW	Residential	PLA		RFA		RFP													Launch
SDG&E	Local	Residential	Single Family		RFA		RFP													Launch
SDG&E	Local	Public	Local Governments			RFA		RFP												Launch
SDG&E	Local	Agricultural	Agriculture Growers			RFA		RFP												Launch
SDG&E	Local	Public	K-12				RFA			RFP										Launch
SDG&E	Local	Public	Federal				RFA			RFP										Launch
SDG&E	Local	Commercial	Concierge					RFA												Launch
SDG&E	Local	Industrial	Port Tenants						RFA											Launch
SDG&E	Local	Industrial	Other						RFA											Launch
SDG&E	Local	Industrial	SEM							RFA										Launch
SDG&E	SW	Residential	SW Downstream Residential HVAC Pilot							RFA										Launch
SoCalGas	Local	Residential	Whole Building	RFA		RFP		Launch												
SoCalGas	Local	Residential	Residential Direct Install (SF, MF, Manuf. Home)	RFA		RFP		Launch												
SoCalGas	Local	Industrial	Small Industrial		RFA		RFP													Launch
SoCalGas	Local	Agricultural	Small Agricultural		RFA		RFP													Launch
SoCalGas	Local	Commercial	Small Commercial		RFA		RFP													Launch
SoCalGas	Local	Public	Small Public		RFA		RFP													Launch
SoCalGas	Local	Commercial	Segment Solution: Office, Retail, Mixed Use		RFA		RFP													Launch
SoCalGas	Local	Commercial	Segment Solutions: Lodging Efficiency		RFA		RFP													Launch
SoCalGas	Local	Public	K-12 Public Performance		RFA		RFP													Launch
SoCalGas	SW	Cross-Cutting	SW - Gas Emerging Technologies		RFA		RFP													Launch
SoCalGas	SW	Commercial	SW - Foodservice POS					RFA		RFP										Launch
SoCalGas	SW	Commercial	SW - Midstream Water Heating					RFA		RFP										Launch
SoCalGas	Local	Residential	Efficient Home Rating					RFA		RFP										Launch
SoCalGas	Local	Agricultural	Urban Ag & Small Green Houses					RFA		RFP										Launch
SoCalGas	Local	Cross-Cutting	DA Community Outreach: Comm'l, Residential, Agricultural, and Pubic					RFA		RFP										Launch
SoCalGas	Local	Industrial	Medium & Large Food Beverage Facility Upgrade					RFA		RFP										Launch
SoCalGas	Local	Industrial	Small Industrial Facility Upgrades					RFA		RFP										Launch
SoCalGas	Local	Residential	Residential 2021 Q1													RFA		RFP		Launch
SoCalGas	Local	Commercial	Commercial 2021 Q1													RFA		RFP		Launch
SoCalGas	Local	Agricultural	Agricultural 2021 Q1													RFA		RFP		Launch
SoCalGas	Local	Industrial	Industrial 2021 Q1													RFA		RFP		Launch

Lead PA for Statewide (SW) Upcoming Solicitations

SW Program Category	Lead IOU	Tentative RFA Release Date
Statewide Lighting	SCE	Q4 2018
Water/Wastewater Pumping		Q1 2019
Institutional Partnerships, UC/CSU/CCC		Q1 2019
Emerging Technologies, Electric		Q1 2019
Upstream & Midstream HVAC (Comm + Res)	SDG&E	Q1 2019
Plug Load and Appliance		Q1 2019
Downstream Residential HVAC Pilot		Q2 2020
Codes and Standards Advocacy	PG&E	Q1 2019
Residential New Construction		Q1 2019
Non-Residential New Construction		Q1 2019
WE&T Career and Workforce Readiness		Q2 2019
WE&T K-12 Connections		Q2 2019
Institutional Partnerships, DGS & Dept of Corrections		Q3 2019
Emerging Technologies, Gas	SCG	Q1 2019
Food Service POS		Q4 2019
Midstream Commercial Water Heating		Q4 2019

Sample EEPRG and IE Milestones

Energy Efficiency Third Party Solicitations



Accomplishments, Activities, & Updates

- EE PRG & IE Handbook
- SW Coordination on Workpaper Development Training
- IOUs have conducted at least one EE PRG meeting
 - EE PRG, IE, & IOU mid-December Meeting
- SW Coordination on CET UI Training
- IOU Communication Plan

Workpaper Development Training

Nov 27. and Nov. 29

- The California investor-owned utilities (PG&E, SCE, SCG,SDG&E) and the CPUC hosted a training on the process and requirements for developing workpapers for new deemed measures and deemed measure updates. Two training sessions were held on the dates below where the same content was presented at each training.
 - Tuesday, November 27, 2018 at PG&E's Pacific Energy Center, San Francisco
 - Thursday, November 29, 2018 at SDG&E's Energy Innovation Center, San Diego



IOU Communication Plan



Communication Type	Audience	Distribution & Location	Objective of Communication	Frequency	Owner
IOU solicitation-related materials include but is not limited to: <ul style="list-style-type: none"> Workshop Presentations Bidder Conference Information Training Material 	Potential EE Third Party Bidders, EE PRGs, IEs, ED, EE Stakeholders	Proposal Evaluation & Proposal Management Application (PEPMA)	To provide IOU-specific solicitation material and information on centralized public forum.	Updated by IOUs on an as needed basis	Each IOU
SW IOU 3P Solicitation Quarterly Schedule	Potential EE Third Party Bidders, EE PRGs, IEs, ED, EE Stakeholders	Posting on PEPMA Website & IOU-individual Website	To provide solicitation schedule updates at the statewide level.	Quarterly	Lead responsible for collecting SW Schedules SCE responsible for posting on PEPMA
EE PRG Meeting Notices	EE PRGs & IEs	Designated location where IOU-specific Confidential information is posted	To inform EE PRG members & IEs about upcoming meetings that need to take place	Updated by IOUs on as needed basis	Each IOU
EE PRG – IE Handbook	EE PRGs, IEs, IOU	Posted on PEPMA & other IOU sites	Final Version to be dated & PDF'd	On an as needed basis	Tentative SDG&E
IOU Specific Rfx Release & Bid Submission Process	Potential EE Third Party Bidders	IOU Specific	To inform potential bidders about IOU-specific 3P EE solicitations; it is also the centralized location where IOU receives bid submissions.	By IOU Solicitation Schedule	IOU Specific
IOU Specific Confidential Information - EE PRG Members	EE PRG Members with Non-Disclosure Agreement (NDA)	IOU Specific	To provide & distribute solicitation related materials to EE PRG members prior and post EE PRG Meeting	Provided by IOU on an as needed basis	IOU Specific
IOU Specific Confidential Information - EE PRG Members (without NDA)	EE PRG members without NDA	IOU Specific	To provide & distribute solicitation related materials to EE PRG members prior and post EE PRG Meeting	Provided by IOU on an as needed basis	IOU Specific

IOU Solicitation Information

- **Proposal Evaluation & Proposal Management Application**
 - <https://pepma-ca.com/Public/Default.aspx>
- **The California Energy Efficiency Coordinating Committee**
 - <https://www.caeec.org/third-party-solicitation-process>

Investor-Owned Utility (IOU)	Solicitation Application & Submittal	IOU 3P Solicitation Website	PEPMA Contact
Pacific Gas & Electric Company (PG&E)	PEPMA https://pepma-ca.com/Public/Default.aspx	https://www.pge.com/eesolicitations	Michelle Cheng 415-973-6984 michelle.cheng@pge.com
San Diego Gas & Electric (SDG&E)	Power Advocate http://marketing.poweradvocate.com/	http://webarchive.sdge.com/regulatory-filing/914/energy-efficiency-filings	Jenny Hindmarsh 858-654-8323 jhindmarsh@semprautilities.com Laura Frazee 858-650-4167 lfrazee@semprautilities.com
SoCalGas (SCG)	Power Advocate http://marketing.poweradvocate.com/	www.socalgas.com/regulatory/efficiency/index.shtml	Jessica Ying 213-231-6177 JYing@semprautilities.com Laura Frazee 858-650-4167 lfrazee@semprautilities.com
Southern California Edison (SCE)	PEPMA https://pepma-ca.com/Public/Default.aspx	www.sce.com/eesolicitation	David Gamache 626-302-0680 david.gamache@sce.com