

## **SCE Bidders' Webinar 04/15/21 Q&A**

1. Question: SCE has been unwilling to provide lists of attendees at Pre-Bid Conferences. Other utilities (e.g. LADWP) do this as a standard part of their major procurements--- whether by using the Planet Bid platform which shows prospective bidders, or sharing sign-in lists for Pre-Bid Conferences. This information facilitates value-added partnering. Is there a regulatory or legal reason why SCE does not provide the name of other bidders in specific procurements?

Answer: SCE understands the limitations of not meeting in person due to COVID restrictions. However, due to the confidential requirements of the solicitation process, SCE is not able to share the identity of bidders. We are investigating paths to create opportunities to facilitate partnerships in the solicitation process.

2. Question: I'm having problems with my Teams Meeting App this morning and was not able to see the chat earlier. Are we to put our names and contact information in the chat as a sign-in into this meeting?

Answer: Sign-in into the meeting was not required. SCE is not collecting this data.

3. Question: Can you convert the percentages on slide #7 into approximate dollar figures for SCE or any of the other utilities?

Answer: As budgets vary from year to year and the other budgetary considerations impact the approximate dollar amount, the percentages are the most prudent way to convey the targets to the marketplace. For previous budgets, please refer historical Annual Budget Advice Letters available on the CAEECC website.

4. Question: Pre-COVID, we were able to meet in person and see who is in the room to be able to network and partner on projects. Virtual meeting does not help small and diverse businesses at all especially during these challenging times. The small and diverse businesses would appreciate it if SCE changes your mind in letting us know who registered and attended this virtual meeting.

Answer: SCE understands the limitations of not meeting in person due to COVID restrictions. However, due to the confidential requirements of the solicitation process, SCE is not able to share the identity of bidders. We are investigating paths to create opportunities to facilitate partnerships in the solicitation process.

5. Question: A opportunity for consideration is providing feedback to bidders on WHY they weren't selected as a candidate to be moved forward in the final review. If the writer/submitter doesn't know what they aren't doing correctly, they will continue to spend tens of hours submitting docs to not be awarded. However, if guidance on: you were not selected due to: A) Incomplete docs submitted. B) Your offerings weren't the right fit for this project. C) Your bid was too high and out of range of the available budget. D) You did not grasp the total concept/need and subsequently didn't address/answer respectively to the actual need. Etc. Etc. Is this something that could be added?

Answer: At the conclusion of the RFA and RFP stage, SCE offers market participants high-level feedback, which includes the following:

- Incomplete Proposal – Missing Documents
- Non-Conforming Proposal - Proposal out of scope for RFA/RFP
- Violation of RFA/RFP Instructions
- Conflict of Interest identified

6. Question: There has been sensitivity around disclosing the number of bidders who submitted abstracts for a given program, and the subsequent number of bidders who submit Proposals for a given program. Why? Also, in some of the other IOU advice letters, this information is disclosed, albeit after the entire solicitation is complete. For example, PG&E Advice letter Advice 4284-G/5894-E pertaining to PG&E's local multi-sector RFP discloses # of abstract bidders (by program), # of RFP bidders (by program), and # of awarded bidders (by program). Does SCE provide this information in its Advice letters and if not, why not?

Answer: The number of bidders at each stage of the solicitation is market sensitive information which is protected from disclosure by CPUC decisions.

7. Question: How do you get on the list to be invited to the SCE Meet the Primes events?

Answer: SCE Supplier and Diversity and Development group does have Meet the Primes events. Please go to the <http://www.sce.com/sd> website for more information.

8. Question: What is SCE's resource goal for completing contract negotiations? Number of meetings and average amount of time per meetings?

Answer: SCE does not have a resource goal for completing contract negotiations. Negotiations between SCE and the market participant are intended to provide both

parties the opportunity to come to agreement on the final Terms and Conditions of the contract.

9. Question: What happens if the allocated 3P budgets are not spent at the required % levels specified in the contract? Does the utility become non-compliant from a 3P budget % allocation standpoint?

Answer: Decision D.18-01-004 defines the IOUs compliance obligations for meeting the 25%, 40%, and 60% contracting requirements. By 12/31/2022, SCE and the IOUs must meet and maintain 60% of budgets under contract with 3rd Party Implementers.

10. Question: SCE has had hesitation about providing a carve-out or preference for Small Businesses. Other utilities (e.g. LADWP) specifically have carve-outs for certified Small Businesses. The carve-out requires a minimum percentage spend (e.g. 25%) under a contract for certified small businesses. This carve-out is above and beyond and Diverse Business Enterprise carve-outs.

Answer: SCE is committed to providing opportunities for Diverse Business Enterprises to participate in our competitive solicitation processes. We are also committed to conducting our solicitation processes in a manner that treats all bidders equally.

11. Question: Could Jay expand upon what he means about lack of clarity around custom measures? What would be an example?

Answer: Summarize vs providing specific examples. For your consideration (update for accuracy):

CET that are developed and submitted in the RFP by the market participants should include the appropriate savings calculations for custom measures and ensure the CET measures are included in the CET Assumptions document to justify the savings calculation.

12. Question: A consideration factor is that not all people who are writing/submitting come from an Energy background. Therefore, providing glossaries is helpful, but also remembering not all words or phrases have the same meaning, I've asked a question before and the response was "it's pretty obvious" but to me, it wasn't at all b/c this is not my background.

Answer: In the RFA/RFP Instructions and the EE Form Agreement there are appendices that define the terms used. Bidders are encouraged and have opportunities to ask questions directly to SCE throughout the solicitation process.

13. Question: I understand the need for participant anonymity. But considering that getting a list of participants is ALWAYS a question/desire. Can you have a check box for participants to make their contact information publicly available? By not doing this, you are biasing participation in favor of large, vertically integrated incumbents and disenfranchising small and minority owned business that the state is committed to leveling the playing field for.

Answer: Due to the confidential requirements of the solicitation process, SCE is not able to share the identity of bidders. We are investigating paths to create opportunities to facilitate partnerships in the solicitation process.

14. Question: Information provided in the debriefing sessions has been very thin and opaque. Why? Isn't this an opportunity to provide bidders with valuable information for future solicitations?

Answer: At the conclusion of the RFA and RFP stage, SCE offers market participants high-level feedback, which includes the following:

- Incomplete Proposal – Missing Documents
- Non-Conforming Proposal - Proposal out of scope for RFA/RFP
- Violation of RFA/RFP Instructions
- Conflict of Interest identified

15. Question: For those that were not able to join the 9a session is there a way to view the presentation given at that time?

Answer: Due to the number of requests that we received, SCE has decided to post pdf version of the presentation along with this Q&A on PEPMA.

16. Question: How will small businesses and/or 2nd Tier/3rd Tier businesses who are new to the program and want to participate in the program know who the Prime Suppliers are? Can a list of Prime Suppliers be provided so that they can be contacted and be able to join teams? Thank you.

Answer: SCE Supplier and Diversity and Development group does have Meet the Primes events. Please go to the <http://www.sce.com/sd> website for more information.

17. Question: Could you provide the basis for the Statewide Lighting Program being "deemed only" and wouldn't proposing a hybrid approach be an innovation?

Answer: The Statewide Lighting Solicitation was not a deemed only solicitation. Deemed was a primary focus of the solicitation due to the mid/upstream nature solicitation. However, calculated proposals were considered with innovation in mind. SCE did remove the inaccurate example on our presentation to eliminate the confusion.

18. Question: When a Bidder proceeds beyond the RFP stage and onto the Contract Negotiation stage is it SCE's intention to move to an executed contract with all bidders who reach this stage? Or is it SCE's intention to continue to "narrow the field" with the full expectation that they will not retain all bidders who have achieved the Contract Negotiation stage.

Answer: SCE's solicitation objective is to contract with the bidder(s) that provides the most cost-effective/competitive program(s) that best fit the Portfolio and customer needs.

19. Question: Can negotiations be split up between program issues and contract issues? Having an attorney sit through ALL of the negotiation sessions is neither cost effective for SCE or the Bidder.

Answer: SCE is taking into account lessons learned from previous negotiations to optimize resource time.

20. Question: Will the IE also be evaluating the M&V of the programs selected or will that be conducted by another set of companies?

Answer: Within the solicitation process, the IE will have visibility of the M&V design of offers to ensure fairness of the solicitation process. SCE will have a team of SME's evaluate the technical rigor of M&V design for selection purposes.

21. Question: Is there a place to see what the scope of the completed and active solicitations are?

Answer: Please refer to the California Energy Efficiency Coordinating Committee (CAEECC) website for more information at: <https://www.caeec.org/third-party-solicitation-process>.

22. Question: I always struggle with the innovation component of the RFA/RFP. I understand the question, but do you have any real-world examples of innovation in current programs?

Answer: Please refer to RFA/RFP Instructions and EE Form Agreement define innovation and refer to the implementation plans on CEDARS for examples.

23. Question: Will the list of attendees be available alongside the slides you will be sending to us?

Answer: No, SCE will not be publishing a list of attendees.

24. Question: Is a third party or subcontractor required to contribute cost match?

Answer: Cost match is not a requirement for SCE's EE solicitations.

25. Question: For Jay, to what degree is the ETRM database relevant for go-forward solicitations.

Answer: Current deerresources.net is still the main resource until eTRM is adopted in the future. eTRM will have some information, however, it will not be the official data source of record until designated by the CPUC - until then <http://www.deerresources.net/> website should be used to locate approved workpapers.

26. Question: In future solicitations, will SCE consider providing a measure picklist for deemed measures. PG&E provided this, and it was quite helpful. This was a list of all inputs for the CET for the deemed measures.

Answer: We will take this under consideration for future solicitations.

27. Question: We are new to SCE. How do we find out about active solicitations and future solicitations?

Answer: <https://www.sce.com/partners/Energy-Efficiency-Solicitations>

28. Question: Will all the Qs and As be either distributed after the meeting or posted on a web site somewhere?

Answer: Yes. They will be posted on PEPMA.

29. Question: Can you please post the URL for the cedars web site?

Answer: <https://cedars.sound-data.com/accounts/login/>

30. Question: Will solicitations that convert natural gas to elect energy be accepted?

Answer: Fuel substitution is allowed in certain circumstances, please refer to the specific solicitation instructions on how fuel substitution is addressed within that solicitation.

31. Question: I had heard that the utility companies were going to start merging their RFA's, RFPs, RFO's in 2022. Is this the case?

Answer: Currently there are no changes in our solicitations plans. CPUC Decision 18-01-004 defines the two-stage solicitation process.

32. Question: Can you talk about the rationale behind focusing almost exclusively on kwh and very little on kw?

Answer: This is the result of the impact of the calculations behind the Cost Effectiveness Tool (CET), the impacts of kWh are much more substantive on the Total Resource Cost Ratio (TRC) than kW impacts.

33. Question: The Independent Evaluator has a role in overseeing all key stakeholders in the procurement process. In particular, what is the Independent Evaluator looking at with respect to bidders?

Answer: Please refer to Decision 18-01-004.

34. Question: If Slides aren't being sent out, will they be viewable on a web site somewhere in the future?

Answer: SCE has decided to post pdf version of the presentation on PEPMA.

35. Question: Where can we go to see who has been awarded previous bids?

Answer: Please refer to the CAEECC website for more information at:  
<https://www.caecc.org/third-party-solicitation-process>.

36. Question: How does an entity apply to be an Independent Evaluator?

Answer: SCE released an RFP for IE services where Interested entities were invited to submit a proposal.

At this point, all of SCEs solicitations have IEs assigned, and any new potential IE opportunities will be pursued via an RFP.

37. Question: Where are solicitation results and awarded programs posted?

Answer: Please refer to the CAEECC website for more information at:

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

38. Question: How can diverse suppliers know who the Prime Suppliers are?

Answer: SCE Supplier and Diversity and Development group does have Meet the Primes events. Please go to the <http://www.sce.com/sd> website for more information.

39. Question: Can renewables and storage be included in the programs or the focus is mainly on kW and kWh savings?

Answer: Although renewables and storage have been allowed in program design, they are not counted toward the goals of the current portfolio which is focused on cost effective kW and kWh savings. EE funds can be used to inform customers about such offerings and the benefits of DSM activities only.

40. Question: Will the PowerPoint be emailed to attendees after this meeting?

Answer: Yes. SCE has decided to post pdf version of the presentation on PEPMA.

41. Question: When is the next cycle to apply for becoming an Independent Evaluator?

Answer: At this point, all of SCEs solicitations have IEs assigned and any new potential IE opportunities will be pursued via an RFP.

42. Question: Please elaborate on the role of utility under a scenario that >60% of program design and implementation is performed by the 3rd party.

Answer: Activities that SCE must perform include but not limited to: Portfolio management, Contract Performance Management, QA/QC Activities, CPUC/Regulatory Compliance Activities.

43. Question: Can you state what the Statewide Higher Education solicitation will be?

Answer: The Statewide Higher Education solicitation is currently underway. It is a statewide solicitation covering the UC, CSU, and CCC to be implemented uniformly throughout all the IOUs' service territory.

44. Question: Will there be an RFP for contractors interested in your Energy Savings Assistance Program?



Answer: Yes. The CPUC is expected to provide a final decision in 2021 on the Energy Savings Assistance (ESA) Application as part of the proceeding A.19-11-003. SCE will conduct competitive solicitations for the ESA Program once the Commission issues a decision on the Income Qualified Program application scheduled to be released on or before 12/31/21.

45. Question: Does the 3rd party min % really step up from 25% to 40% in 3 months from Sept to Dec 2020?

Answer: Yes, SCE was required to meet the 25% contracted with 3rd Parties by 9/30/2020 and 40% by 12/31/2020.

46. Question: Do all SCE procurements have up-front financial performance assurance requirements as do the EE solicitations?

Answer: Performance Assurance requirements are standard in SCE's competitive solicitations.

47. Question: Please provide the link to the Nov 4, 2020 CET Input Guide that Jay mentioned.

Answer: [https://cedars.sound-data.com/cet\\_ui/cet-user-guide](https://cedars.sound-data.com/cet_ui/cet-user-guide). The link will require that you have a login already established.