# Southern California Edison Presents:

Statewide Lighting Program - Request for Abstract

## Bidders' Conference

Welcome and thank you for joining us today!

Our presentation begins at <u>9:00 a.m.</u> and ends no later than <u>11:00 a.m.</u>

July 10, 2019



## Introductions

Name	Entity
Linda White	SCE – Procurement Advisor
Pei-Chi Chou	SCE – Energy Efficiency & Conservation Advisor
Gerard Nesbitt	SCE – Energy Efficiency & Conservation Advisor

# Agenda: July 10, 2019

Topic	Presenter	Estimated Duration
Overview – Agenda, Ground Rules, and Solicitation Schedule	Linda White	5 min
Supply Management (Submissions, Ariba, etc.,)	Linda White	5 min
SCE Business Plan Portfolio Strategies and Objectives	Pei-Chi Chou	10 min
BREAK		5 min
Request for Abstract ("RFA" or "Solicitation") and Content	Gerard Nesbitt	30 min
Q&A Session	All Panelists	To end of questions or 11:00 am
Closing Remarks and Next Steps	Linda White	2 min

# A brief Safety moment!

### Disclaimer

- SCE is providing this bidder conference material as a courtesy for the benefit of potential RFA respondents.
- Please note that this conference will be recorded, and SCE reserves the right to post all recordings.
- All information contained herein is in draft form and may be modified.
- SCE assumes no liability for any errors or for any conflict between the information presented here and the final solicitation materials.
- The RFA is also subject to any applicable decisions and policies, which may change at any time.
- WHILE SCE STRIVES TO MAKE THE INFORMATION IN THIS PRESENTATION AS TIMELY AND ACCURATE AS POSSIBLE, SCE MAKES NO CLAIMS, PROMISES, OR GUARANTEES AND DOES NOT REPRESENT OR WARRANT THE ACCURACY, ADEQUACY, OR COMPLETENESS OF THE CONTENTS OF THIS PRESENTATION, AND EXPRESSLY DISCLAIMS ANY LIABILITY FOR ERRORS OR OMISSIONS IN CONTENTS OF THIS PRESENTATION.

### **Document Conflicts**

- This presentation is intended to be a summary level discussion of the information and requirements established in the Solicitation and does not include all of the detailed information in the Solicitation materials, which includes the Solicitation Instructions, the NDA, applicable Decisions, and the Offer Workbook (the "Solicitation Materials").
- To the extent that there are any inconsistencies between the information provided in this presentation and the requirements established in the Solicitation Materials, the Solicitation Materials will govern.
- Capitalized terms used but not defined in these slides are defined in the RFA Materials.

### SCE Contact

SCE's main contact for this Solicitation is as follows:

Prior to the obtaining access to the Solicitation Website, please direct questions to Linda White at <u>LindaValerie.White@sce.com</u>, with the Independent Evaluator copied.

After obtaining access to the Solicitation Website, please use the Ariba message board, which will automatically direct your questions to an SCE contact and the IE.

Offeror, and Offeror's employees, agents, contractors and representatives are each prohibited from discussing their Offer or this Solicitation with any SCE employee, other than those SCE employees that are expressly permitted to discuss Offeror's Offer and this Solicitation (such communication prohibition, the "SCE Communication Requirements"). Failure to comply with the SCE Communication Requirements may be grounds for disqualification.

## Independent Evaluator

- Barakat Consulting, Inc. will be the Independent Evaluator (IE) for this solicitation.
  - Elizabeth Lowe lead and key contact (<u>elowe@barakatconsulting.com</u>)
- IE is required pursuant to CPUC Decisions.
- IE monitors SCE's solicitation activities, communication between SCE and Offerors and is copied on all correspondence.
- IE performs an independent review of the Offers and a detailed review of the valuation methodology and selection processes.

If not yet Registered for the Solicitation, Offerors must include the IE on all correspondence with SCE.

Once Registered, Ariba message board will forward correspondence with SCE to the IE.

### Call-In Ground Rules

Upon entering this Webinar you should be <u>automatically be placed on mute</u>. If you are not muted - please mute your call and <u>remain on mute</u> during this presentation.

Questions concerning the RFP will only be responded to during the open questions and answers "Q&A" portions of this presentation.

Future viewing of this presentation:

 This presentation is being recorded and will be available in the next working day on the Proposal Evaluation Proposal Management Assessment (PEPMA) website at: <a href="https://www.pepma-ca.com/">https://www.pepma-ca.com/</a> on the 3<sup>rd</sup> Party Energy Efficiency Information & Resources page.

## Overview – Purpose

- The 2019 Statewide Lighting RFA is issued pursuant to California Public Utilities Commission ("CPUC") Decisions ("D.") 18-01-004, D.16-08-019, and D.18-05-041, among other Decisions.
- This Bidder's Conference will provide context regarding IOU overall Energy Efficiency portfolio planning, and the proposed Vision and Goals for Offers that arise from the Statewide Lighting RFA.
- This Bidder's Conference will Help Offerors understand how to successfully submit complete and conforming Offers for the Statewide Lighting RFA.

## Bidder Questions

#### **Questions and Answers:**

- You may ask questions during the Q&A period by typing the questions into the Skype Q&A screen in this presentation.
- Our subject matter experts on the panel will address the questions during the Q&A sessions in the agenda.
- Panelist may or may not provide answers to all questions at this time and answers to the Questions during the bidder's conference are **preliminary**.

#### **Final Answers to Questions:**

- Answers to questions presented during this presentation are being collected, and
- These Questions will be officially responded to with <u>final</u> answers and posted on the PEPMA website after the conference.

Website Overview, Document Requirements, and SCE Contact

Presenter:
Linda White
Southern California Edison –
Supply Management



## Solicitation Participation

### **Documents posted on The Website in the following manner:**

### **Registration Instructions**

In order to participate in this 2019 Statewide Lighting RFA, registration is required by following the steps below:

- 1. Register on SAP® Ariba® with SCE using the following link: <a href="http://sce.supplier.ariba.com/register">http://sce.supplier.ariba.com/register</a>
- 2. Reply to **launch email** and confirm the following SCE Ariba Account information:

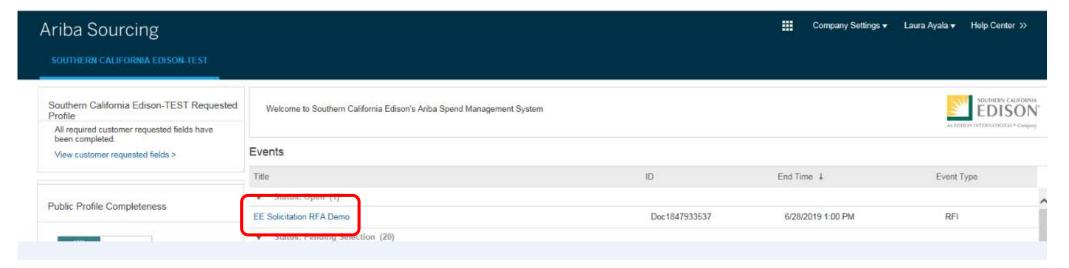
Organization Name (as registered in Ariba)
ANID - If known
Ariba registered email address
Ariba user name (only one contact name per company)

You will receive a confirmation that you have been added to the Solicitation.

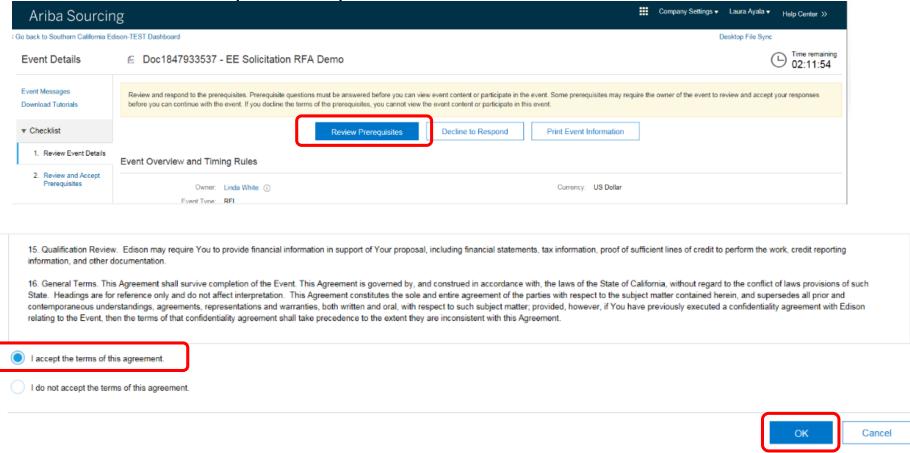
## Submission of Proposals

#### **Overview-Posting proposals to the Ariba (Platform) Website:**

- 1. Go to <a href="https://sce.supplier.ariba.com">https://sce.supplier.ariba.com</a> and log into your SCE Ariba account.
- Find the Event Screen and select event name.



3. Review and Accept Prerequisites



### 4. Download files in questions 2 and 3

**Question 2 - Solicitation Instructions** 

**Question 3 – Solicitation Attachment Files** 

#### 3.1 Reference Files

**SCE Service Territory** 

SCE Zip Code File

PG&E Service Territory

Safety Tier 1 Supplier Information

Safety Tier Classification

SCE Policy on Information Security, Cybersecurity and Privacy for Suppliers

#### 3.2 Response Files

Non-Disclosure Agreement (NDA)

Offer Workbook

To download, click on each file name and select "download file".

### 5. Provide response in questions 4 and 5

5.1.3 Attach your Offer Workbook here

▼ 4.1 Non-Disclosure Agreement

4.1.1 Attach your partially or fully signed Non-Disclosure Agreement here.

▼ 5 Technical Proposal

Use this question to upload the required files for technical elements of the offer. Attach all files noted herein and in the proper sections. Question 5 allows for 10 offers. If you have more than 10 offers, use question 6 to submit those files

▼ 5.1 Offer 1

5.1.1 Offer 1 program name

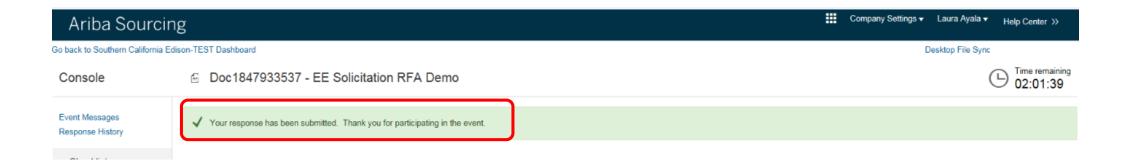
5.1.2 Attach your Offer Narrative here

Use question 6 <u>only if you have greater than 10 programs</u> in your bid submission

Use question 7 for additional files you may wish to add. Such files will not be part of evaluation.

6. When complete, click on "Submit Entire Responses", then click on "OK"

Your submission is complete if you see "Your response has been submitted"



## Required Documents

### Offeror Response Must Include the following items.

- 1) Partially Executed Non-Disclosure Agreement (NDA)
- 2) Offer Narrative (Created by Offeror)
- 3) Offer Workbook

- •Foot note on SCE's "Cure" process: In SCE's sole discretion, SCE may allow an Offeror to cure any non-conforming information or uploaded documents; **provided** that such Offer has been timely submitted. If cures are allowed, SCE will notify Offeror and will provide Offeror with the deadline to complete the cure.
- •Please note: Offers provided after the Offer Submittal Deadline will not be reviewed, even if the Offer submittal process had begun prior to the Offer Submittal Deadline. SCE encourages Offerors to allot sufficient time to complete the submittal process.

### **RFA Submissions**

- Each Offer should be uploaded to the Website as individual files.
- Ensure that file names for your Offer submittals do not contain any special characters, such as \*&#, and
- Ensure that file names for your Offer submittals use the following naming convention:
  - Technical Documents: OfferorName\_Offer#\_CustomerSegment\_ProjectName\_FileName
  - Commercial Documents: OfferorName\_FileName

#### For example:

- "ABCLighting\_Offer1\_Residential\_ ProjectRose\_OfferNarrative.docx."
- "ABCLighting\_Offer1\_Residential\_ ProjectRose\_OfferWorkbook.xlsx."
- "ABCLighting\_NDA.pdf"

All files must be submitted as Microsoft Word or Excel documents that are editable and unprotected (no protection and no encryption). Adobe Acrobat files are only acceptable when submitting signature pages.

# SCE Business Plan Portfolio Strategies and Objectives

Presenters: Pei-Chi Chou

Southern California Edison



## Statewide Program

A Program that is designed to be delivered consistently and uniformly throughout the Investor Owned Utilities (IOUs) service territories. Local or regional variations in incentive levels, measure eligibility, or program interface are not generally permissible.

Upstream (at the manufacturer level) and midstream (at the distributor or retailer level, but not the contractor or installer level) interventions are required to be delivered statewide. Some, but not all, downstream (at the customer level) approaches are also appropriate for statewide administration<sup>1</sup>.

<sup>1.</sup> Decision 16-08-019, *Decision Providing Guidance for Initial Energy Efficiency Rolling Portfolio Business Plan Filings* (Rulemaking 13-11-005), California Public Utilities Commission, p. 61

### Introduction: What do we need?

- Statewide Lighting program that is cost-effective and meets regulatory mandates.
- Simple and innovative program design that will effectively serve all IOU customers.

 High performing implementers that are able to navigate the everchanging landscape of the Demand Side Management (DSM)

world.



## Statewide Lighting Program Objectives

- Programs should be cost-effective (TRC > 1.25) and meet California legislation and IOU energy savings goals.
- Program should be mass market that allows all IOU customers to participate.
- Simplified process to maximize customer participation
- Support Integrated Demand Side Management (IDSM) of EE and DR where applicable.

### CPUC Screw-In LED Memo

Per a CPUC memorandum dated June 14th, 2019 the following update to screw-in lamps for 2020.

This California Public Utilities Commission Energy Division (ED) notifies the Program Administrators of an intent to propose revisions to **screw-in lamp baselines to 100% LED for normal replacements** in the upcoming database of energy efficiency resources (DEER) update Resolution scheduled for a Q3 2019 release. The draft DEER resolution issued by ED will need final approval by the full Commission.

- Please take note of this proposed change to lighting baselines when designing your programs for 2020 and beyond
- Historically the IOU Primary (Upstream) Lighting programs have been predominantly screw-in lamps
- Programs utilizing similar designs will have significant impacts based upon this guidance
- A copy of the CPUC Memo (uploaded to PEPMA)

# Break

and we are back in...



## Request for Abstract Overview

# Presenter: Gerard Nesbitt Southern California Edison



## Vision for Statewide Lighting Program

- Achieve Cost-Effectiveness and Cost-Efficiency
  - Simplify and streamline program offerings (products, services, etc.)
  - Increase use of Upstream and Midstream Delivery Channels
  - Encourage self-service solutions

### Advance Innovation

- Managed by Third-Party Implementers, not IOUs
- Inject new thoughts and ideas into the management process
- Leverage Third-Party offerings, designs, and implementation strategies

## Simplify Participation

- Reduce or eliminate Market Barriers
  - Ease of Access for Hard-to-Reach and/or Disadvantaged Communities
  - Offer solution(s) to alleviate landlord-tenant participation challenges
- Reduce Number of Touchpoints

## Offeror's Keys to Success

- Fully read, understand, and follow the Solicitation Instructions
- Start preparing your Offer(s) early.
- Keep track of the Offer Submittal Deadline.
- Adhere to the Document Naming Convention.
- Submit a Complete Offer (Use the Offer Workbook's Checklist!)
- Quickly cure any deficiencies (if SCE asks).
- If you have questions, do not hesitate to contact SCE via Ariba message board.

## RFA Offer Evaluation – Complete & Conforming

Offers will be evaluated on the following criteria to be considered for selection in this solicitation:

- Meet the eligibility criteria set forth in these Solicitation Instructions
- Adhere to the Solicitation Schedule and other submittal requirements set forth in Article Three of these Solicitation Instructions, and
- Adhere to, input and upload all information as required by or instructed per the Offer Workbook.

SCE will screen Offers on a "pass-fail" basis against these complete and conforming criteria and requirements.

After the Offer Submittal Deadline, SCE reviews all Offers received for completeness and conformity. This review includes an initial screen for required submission criteria, including, but not limited to, conforming location, customer sector, and the submission of a complete submittal package. Offerors lacking any of these items may be allowed a reasonable cure period to remedy any deficiencies.

## Statewide Lighting RFA Solicitation Schedule

Milestones	Estimated
RFA issued to Bidders (via Ariba)	Tuesday, July 2, 2019
Bidders Conference (via Skype)	Wednesday, July 10, 2019, 9:00 a.m. Pacific Prevailing Time ("PPT")
Bidder Offer Due ["Offer Submittal Deadline"] (electronic via Ariba)	Tuesday, July 30, 2019 by 4:00 p.m. PPT
Notify Offerors of RFA Shortlist Selection	Monday, August 26, 2019

SCE reserves the right to revise any Solicitation Event Date or any Submittal Requirement.

## RFA Response Items

Offeror is required to download, fill out and upload several documents, all of which are accessible via the Website. Below is a list of required documents that must be uploaded to the Website no later than the Offer Submittal Deadline:

- 1) Partially Executed Non-Disclosure Agreement ("NDA")
- 2) Offer Narrative (~ 2-3 pages): one Offer Narrative for each Offer, which must include the following:
  - Scope: describe the Offer's scope and objective including the Customer Sectors and sub-segment(s) served, Delivery Channels, electric end-uses, and geographic areas that the Offer will cover within the IOU territories;
  - > <u>Strategy</u>: describe how the proposed Offer strategy delivers on the vision and goals for an IOU program as laid out in the Business Plans. Include Innovative aspects of the Program, how the Program expects to meet cost effectiveness requirements, and assists EE portfolios with capturing Spillover effects if applicable.
  - ➤ <u>End-to-End Process</u>: describe the end-to-end process (including program planning through design, savings verification and inspection of the work to be completed) and implementation activities.

SCE may request additional information (not included in these Solicitation Instructions or on the Website) from Offerors at any time during the Solicitation.

## RFA Response Items (Continued)

**Offer Workbook:** one Offer Workbook per Offer, in Excel format that contains pricing information. Offeror must answer each question in the Offer Workbook. Section 3.07 contains certain fields from the Offer Workbook that require additional explanation.

### **Important!** Offeror Collaboration (Partnering/Subcontracting)

While collaboration is permissible to the extent that such collaboration would lead to a more comprehensive and integrated Offer, Offerors must also take precautions to avoid anti-competitive behavior and to comply with all California and federal antitrust laws.

Accordingly, Offerors should engage in communicating only with a limited number of potential partners and such communications should occur as early in the bid formulation process as reasonably possible, and Offeror should not communicate the specific content of its Offer either directly or indirectly to any competitor or any other person engaged in the same line of business during the procurement process for this Solicitation unless and until such other person or entity becomes a partner or joint Offeror. An Offeror must disclose whether or not it has collaborated with any third party and provide a list of such third parties in Offeror's Offer Workbook.

SCE may request additional information (not included in these Solicitation Instructions or on the Website) from Offerors at any time during the Solicitation.

## Offeror Eligibility

- IOU Affiliates Barred from participation.
  - Neither Offeror nor its Contractors, Subcontractors or Affiliates are an IOU Affiliate.
- CPUC Evaluators Firewalls required, pursuant to D. 05-01-055.
  - Offerors, Affiliates, and contractors/subcontractors who:
    - Perform impact evaluation studies on California EE Programs
    - Are an evaluation contractor or subcontractor for a California EE Program
- Contractor's State License Board Situational.
  - If a license is required for the program Offered, Offerors and their subcontractors must:
    - Hold valid contractor's licenses prior to executing a Final Agreement with SCE [RFP shortlist]
    - Maintain the validity of the licenses throughout the duration of the program.

## Offer Eligibility

- Statewide Offers must be statewide in scope.
  - Programs offered uniformly throughout IOU territories
  - Local or regional variations in incentive levels, measure eligibility, or program interface are not generally permissible
- Delivery Channels Offers must be predominantly for Upstream and/or Midstream Delivery Channels.
  - Upstream: influences costs to manufacturers, reducing wholesale cost of equipment
  - Midstream: influences cost to distributors, reducing retail customers' purchase and/or installation costs
- Resource Programs Offers must be for a Resource program and propose Energy Efficiency savings.

### Additional Preferences

- Cost Effective (TRC >= 1.25),
- Cost Efficient (\$/Net kWh comparable),
- Innovative
  - Advances Technology
  - Marketing Strategy
  - Delivery Approach
- Exhibits Pay-For-Performance (payment structure tied directly to energy savings delivered and claimed),
- Administrative Costs at or below 10% total program costs,
- 3-to 5-year Implementation Period,

- Assist IOUs with meeting Customer Sector Requirements (list is not all-inclusive)
  - Embedded M&V
  - Reduce/eliminate Market Barriers, Free Ridership
  - Serve Hard-to-Reach or Disadvantaged Communities
- Offeror has Proven Experience...
  - Serving the Customer Sectors proposed in their Abstract
  - Working with lighting channel partners including Manufacturers, Distributors, and Retailers
- Advancing IDSM opportunities

## Additional Preferences: Supplier Diversity

- SCE encourages Women-Owned, Minority-Owned, and Disabled Veteran-Owned Business Enterprises and Lesbian, Gay, Bisexual and/or Transgender Business Enterprises ("Diverse Business Enterprises" or "DBE") to participate in the Statewide Lighting Solicitation
- CPUC General Order (GO) 156 (<a href="http://www.cpuc.ca.gov/generalorders/">http://www.cpuc.ca.gov/generalorders/</a>) sets the rules governing the development of programs to increase participation of Diverse Business Enterprises in procurement of contracts from utilities as required by CPUC Code
- Information on SCE's Supplier Diversity Program can be found on the following SCE website: <a href="http://www.sce.com/sd">http://www.sce.com/sd</a>

Offerors can help SCE achieve its GO 156 goals in the following ways:

- Participate as a qualified DBE Bidder
- Participate as a qualified DBE subcontractor(s) to a Bidder (Tier 2 subcontractor)
- To be qualified, DBE owned companies (Bidders or Subcontractors) must register with the CPUC Supplier Clearinghouse at (<a href="http://www.thesupplierclearinghouse.com">http://www.thesupplierclearinghouse.com</a>)
- View Article 2 of the Solicitation Instructions for more information

## Program Budget Guidance

### Current Situation

- All IOUs jointly filed proposed EE Statewide Program budgets for 2020
- CPUC Memo from June 14, 2019 prepares IOUs (and Market) for new LED baseline on screw-in lamps
- 2020 Market Potential Study expected in July 2019

### Guidance

- IOUs have not been able to discuss scope impacts from the Memo
- Lighting opportunities expected to be reduced
- Advise Offerors to research past few years of IOU Upstream/Midstream lighting program performance on CEDARS

## Ineligible Offers

- Offers where Lighting EE savings acquisition is NOT the primary focus of the program design
  - Non-resource Programs
  - Market Transformation Programs
  - Other non-lighting DSM Technology is the focus
- Direct end-user service delivery, such as a Downstream-only Delivery Channel
- Offers that are better suited to other Statewide or Local Solicitations
- Offers containing Compact Fluorescent Lighting
- Offers for new and unproven technology, tool development, or completion of product

### RFA Offer Workbook Overview

Offer Workbook - Below is a list of sections in the Excel workbook required as part of Offeror's submittal (also see FAQ in the Workbook):

- Checklist Tab
- Offeror Information Tab
- Offer Summary Tab
- Qualitative Questions

The "Offer Checklist" (Tab) screen shot:

Offer C	Offer Checklist			
Offer Checklist				
Offer Narrative	TRUE	FALSE		
Complete Workbook	TRUE	FALSE		
Offeror Information Complete	TRUE	FALSE		
Offer Summary	TRUE	FALSE		
Qualitative Questions	TRUE			
Partially Executed NDA	TRUE			

## RFA Offer Workbook Overview (Continued)

# Cells formatted with a pink background denote required fields that have not been completed.

- Checklist tab tracks the completeness of the Offer.
  - Cells update automatically as Offeror completes required fields.
  - Offeror must update 'Offer Narrative' and 'Partially Executed NDA' fields manually.
- Offeror Information tab collects general information about the Offeror and Offeror's proposed team, if applicable.
- Offer Summary tab provides information about the Offer itself, including but not limited to Delivery Channels, Proposed Budget, and Proposed Savings.
- Qualitative Questions tab presents the questions that SCE will use to score all Complete and Conforming Offers. The data provided in the other Workbook tabs should support Offeror's written responses.

## RFA Offer Inclusivity and Exclusivity

An Offeror can submit single or multiple Offers.

- Offers can be "mutually inclusive" of other Offers. Offers can be "mutually exclusive" of each other (i.e., a group of Offers where SCE can only select one from the set; common when submitting multiple Offers from a single program).
- To designate Offers as either <u>mutually inclusive</u> or <u>mutually exclusive</u>, Offeror must first submit each individual Offer. Offeror must indicate if Offers are mutually inclusive, mutually exclusive, or neither, in their Offer Workbook(s) on the Offer Summary tab.

## Bidder's Conference Recap

- How to use Ariba
- Provided background on IOU portfolios
- Provided Vision for Statewide Lighting Program(s)
- Provided how to submit a complete response
- Reviewed Solicitation Requirements and Preferences

If you have questions, do not hesitate to contact SCE via Ariba message board.

## Other: Important References

- SCE.com
  - www.sce.com/eesolicitation
- PEPMA
  - https://pepma-ca.com/
  - https://www.pepma-ca.com/Public/PublicEvents.aspx?type=1
- CEDARS
  - https://cedars.sound-data.com/programs/list/
- Market Potential Study
  - http://www.cpuc.ca.gov/general.aspx?id=6442452619

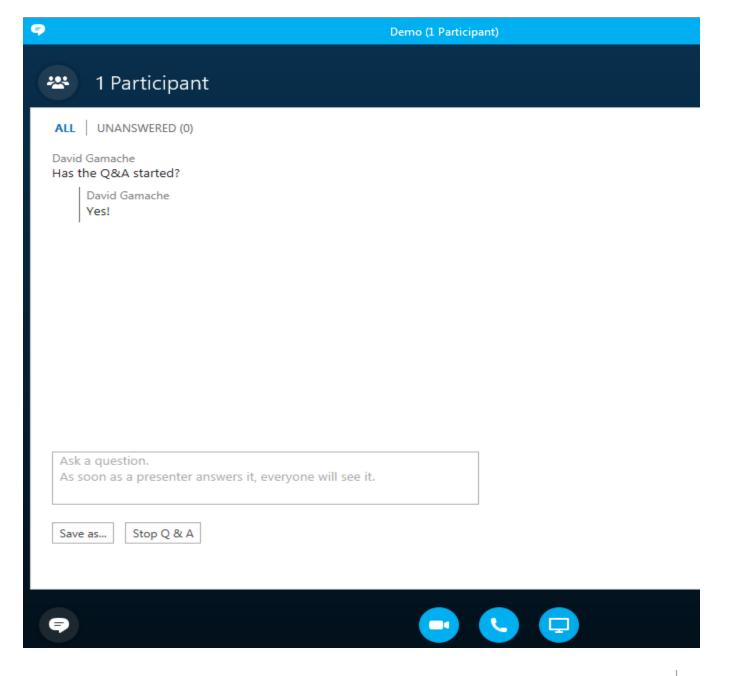
# **Q&A Session**

## **Q&A** Session

#### **SAMPLE:**

You should now be viewing the Skype Q&A screen and no longer viewing the presentation slides, such as this page:

- If you do not see the screen as shown \*\*\*
- Change Tabs at the bottom of your screen from "Content Stage" (Slide presentation view) to the "Q&A."



## Closing and Next Steps

SCE appreciates your participation in today's webinar.

Thank You!

