

Energy Efficiency



SoCALGAS ENERGY EFFICIENCY SOLICITATIONS WEBINAR

August 29, 2018
10:00 a.m. to 12:00 p.m.

AGENDA

1. Welcome
2. Webinar Objective
3. Solicitations Update
4. Solicitations Schedule
5. RFA, RFP, Scoring/Evaluation
6. Business Goals
7. Q&A

WELCOME

PRESENTERS

Ganesh Venkat	Portfolio Management
Karen Mar	Solicitations Lead
Carlo Gavina	Portfolio Optimization Advisor
James Ward	Finance Product Lead
Joe Frausto	Finance Marketing, Education, and Outreach Lead
Yolanda Padilla	Supplier Diversity Project Manager

SOLICITATION OBJECTIVES

PHASE 1

- 2018-2019
- 25% by '19
- Local programs
- ~ \$25 mil.

PHASE 2

- 2019-20
- 40% by '20
- Statewide programs
- + ~ \$15 mil.

PHASE 3

- 2020-2022
- 60% by '22
- TBD
- + ~ \$20 mil.

SOLICITATION OBJECTIVES

- Collaborative approach, resulting in “win-win” for the utility, vendors, and the customer
- Coordination with IOUs, RENS & Municipalities
- Meeting regulatory mandates: Savings goals, TRC
- Fairness ensured by regulatory oversight: EEIE and PRG

SOLICITATION UPDATES

INDEPENDENT EVALUATORS (IE)

- Four selected and approved by Director of Energy Division
- Contracts completed

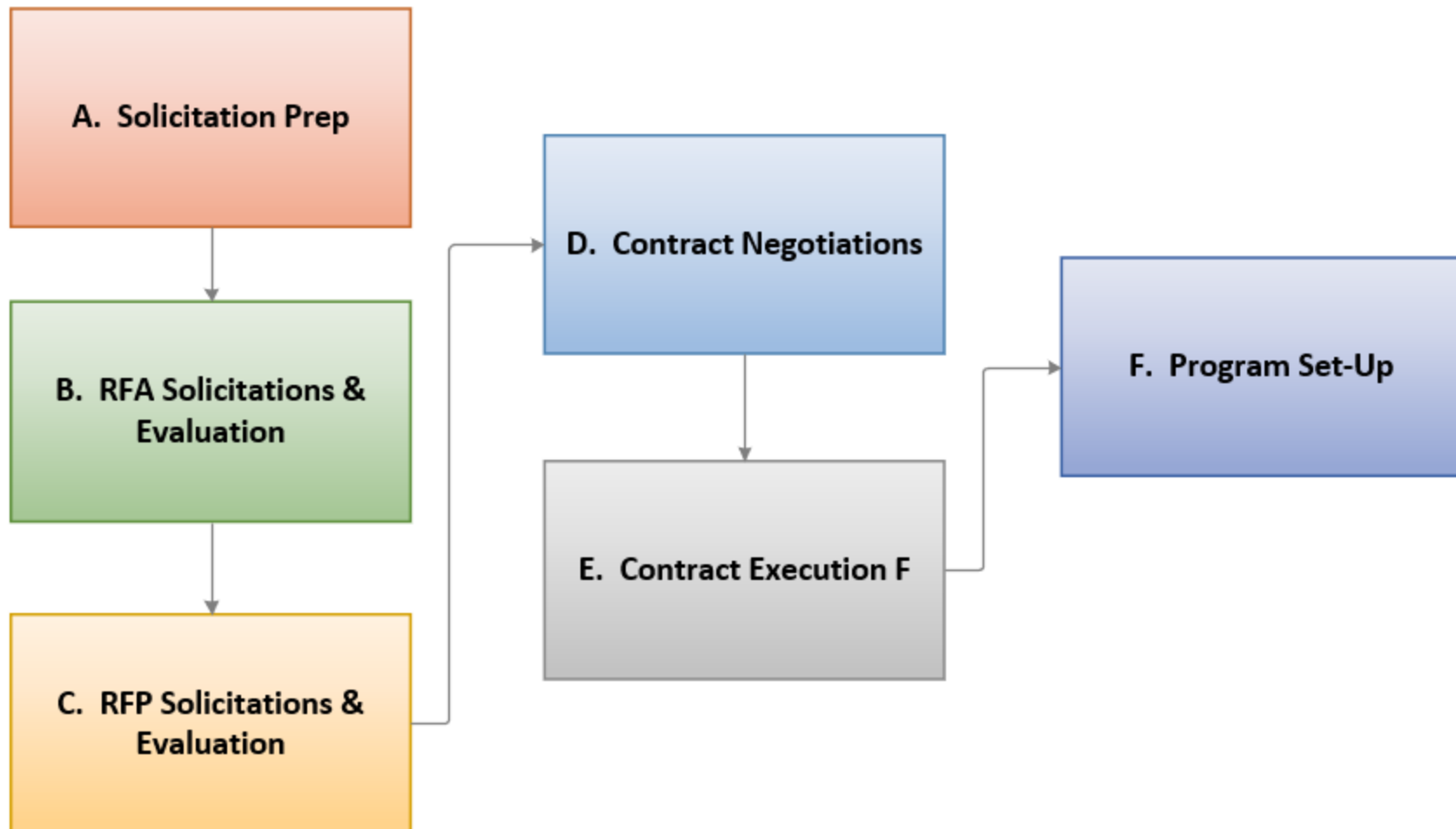
EE PROCUREMENT REVIEW GROUP (EE PRG)

- Local & Statewide selected

SOLICITATIONS

- Tentative Launch: October 1

Solicitations & Program Set-Up: Process Overview



2018-2022 OVERVIEW

2018-2019

		2018				2019															
		Schedule Subject to Change				Q3	Q4			Q1			Q2			Q3			Q4		
Round	ID	PROGRAM OFFERING	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan		
1	1	Whole House Building*		RFA	RFA Sel	RFP Sel / AL*		Contract		Launch											
	2	Residential Direct Install - Single Family		RFA	RFA Sel	RFP Sel		Contract		Launch											
	3	Residential Direct Install - Multi Family		RFA	RFA Sel	RFP Sel		Contract		Launch											
	4	Residential Direct Install - Manufactured Home		RFA	RFA Sel	RFP Sel		Contract		Launch											
2	5	Industrial Direct Install*			RFA	RFA Sel	RFP Sel / AL*		Contract		Launch										
	6	Agricultural Direct Install			RFA	RFA Sel	RFP Sel		Contract		Launch										
	7	Small Commercial Standard & Comprehensive Direct Install			RFA	RFA Sel	RFP Sel		Contract		Launch										
3	8	Public Facilities Direct Install				RFA	RFA Sel	RFP Sel		Contract		Launch									
	9	Segment Solution: Office, Retail, Mixed Use				RFA	RFA Sel	RFP Sel		Contract		Launch									
	10	Segment Solutions: Lodging Efficiency				RFA	RFA Sel	RFP Sel		Contract		Launch									
4	11	K-12 Public Performance					RFA	RFA Sel	RFP Sel		Contract		Launch								
	12	SW - Gas Emerging Technologies						RFA	RFA Sel	RFP Sel / AL*		Contract		Launch							

* Advice Letter Required

25%

SoCalGas Solicitations Schedule located here:

<https://www.socalgas.com/regulatory/efficiency/index.shtml>

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



2018-2022 OVERVIEW

2019-2020

		2019				2020													
		Schedule Subject to Change				Q1			Q2			Q3			Q4				
Round	ID	PROGRAM OFFERING	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan
	13	SW - Foodservice POS*		RFA	RFA Sel	RFP Sel / AL*				Contract			Launch						
	14	SW - Midstream Water Heating*		RFA	RFA Sel	RFP Sel / AL*				Contract			Launch						
	15	Efficient Home Rating (Non-Behavioral)		RFA	RFA Sel	RFP Sel				Contract			Launch						
	16	Urban Ag & Small Green Houses		RFA	RFA Sel	RFP Sel				Contract			Launch						
	17	DA Community Outreach: Comm'l, Residential, Agricultural, and Pubic			RFA	RFA Sel	RFP Sel			Contract			Launch						
	18	Medium & Large Food Beverage Facility Upgrade			RFA	RFA Sel	RFP Sel			Contract			Launch						
	19	Home Energy Rating (Behavioral)*								RFA	RFA Sel	RFP Sel / AL*	Contract						
		* Advice Letter Required																	
						25%													40%

SoCalGas Solicitations Schedule located here:

<https://www.socalgas.com/regulatory/efficiency/index.shtml>

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

2018-2022 OVERVIEW

2021 - 2022

		2021												2022											
		Q1			Q2			Q3			Q4			Q1			Q2			Q3			Q4		
Round	ID	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
		Schedule Subject to Change																							
	20			RFA	RFA Sel	RFP Sel				Contract			Launch												
	21			RFA	RFA Sel	RFP Sel				Contract			Launch												
	22			RFA	RFA Sel	RFP Sel				Contract			Launch												
	23			RFA	RFA Sel	RFP Sel				Contract			Launch												
	24			RFA	RFA Sel	RFP Sel				Contract			Launch												
	* Advice Letter Required																								
																									60%

SoCalGas Solicitations Schedule located here:

<https://www.socalgas.com/regulatory/efficiency/index.shtml>

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

PHASE 1: 2018-2019

			2018				2019														
			Schedule Subject to Change																		
			Q3	Q4			Q1			Q2			Q3			Q4					
Round	ID	PROGRAM OFFERING	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan		
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* Advice Letter Required																					
																				25%	

SoCalGas Solicitations Schedule located here:

<https://www.socalgas.com/regulatory/efficiency/index.shtml>

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

PHASE 1: 2018-2019

COUNT	Q4 2018 – Q4 2019	EST. CONTRACT VALUE PER YEAR	PROGRAM CONCEPTS
1	Round 1	\$1.5M - \$2.5M	Residential Whole House
2	Round 1	\$1.5M - \$2.5M	Single Family Direct Install (DI)
3	Round 1	\$1M - \$2M	Multi-Family DI
4	Round 1	\$1M - \$2M	Manufactured Homes DI
5	Round 2	\$2M - \$3M	Industrial DI
6	Round 2	\$1M - \$2M	Agricultural DI
7	Round 2	\$1.5M - \$2.5M	Small Commercial DI
8	Round 3	\$1M - \$2M	Public Facilities DI
9	Round 3	\$1M - \$2M	Segment Solutions: Office, Retail, Mixed use
10	Round 3	\$1.5M - \$2.5M	Segment Solutions: Lodging Efficiency
11	Round 4	\$1M - \$2M	K-12 Public Performance
12	Round 5	\$1M - \$2M	Statewide Gas Emerging Technology

REQUEST FOR ABSTRACT & PROPOSAL

ABSTRACT	PROPOSAL
PROGRAM DESIGN	PROGRAM DESIGN
MEASURE LIST	MEASURE LIST
BUDGET	BUDGET
EXPERIENCE	EXPERIENCE
BUSINESS REQUIREMENTS (e.g., DBE, SUSTAINABILITY, T&C)	BUSINESS REQUIREMENTS (e.g., DBE, SUSTAINABILITY, T&C)
	COST EFFECTIVENESS TEST (CET)
	EM&V
	DATA SECURITY REQUIREMENTS
	CLARIFICATION QUESTIONS
	NEGOTIATIONS

FINANCING PRODUCTS

PRESENTERS

Joe Frausto

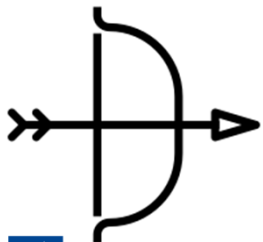
OBFF PM/REEL ME&O Lead

James Ward

Financing Products Lead

Energy Efficiency Financing Products

- » SoCalGas EE Portfolio Goal #3: “Meet customers’ EE adoption preferences...that address **customer EE needs.**”
- » SoCalGas anticipates working with trusted partners that have comprehensive perspective through **smarter partnering.**
- » **EE financing** is one of several **intervention strategies** intended to more effectively overcome market barriers across several segments.



Financing Products Background

- » Benefits of incorporating EE financing products into program design:
 - ✓ Provide attractive options to meet energy improvement objectives (e.g. better rates and/or terms).
 - ✓ EE financing helps customers overcome project cost hurdles.
 - ✓ EE financing integrates seamlessly with EE programs.
- » EE Financing Products:
 - (1) **Financing Pilots** and (2) **On-bill Financing**

EE Program + Financing = WIN WIN WIN

Financing Pilots v. On-Bill Financing

Feature	Energy Efficiency Financing Pilots	On-bill Financing
Target Audience	Residential, Business, and MF Property Owners ¹	Business and MF property owners
Interest Rates	Residential ² - 4.99%-9.99% Business/MF - TBD	0% (yes, zero!)
Loan Terms	REEL - Up to 15 years Commercial/MF - TBD	Up to 15 years ³
Loan Funding Source	Private Capital	Ratepayer Funds
Rebate/Incentive Requirement	Optional ⁴	Yes
Underserved Segments	Residential customers with low credit and income Small business, affordable MF properties	Affordable MF properties

¹ Residential program currently available. Business and MF target launch Q4 2018/Q1 2019.

² Based on participating lender, subject to change.

³ Refer to OBF program terms for details.

⁴ Refer to program details and eligible measures list available on GoGreenFinancing.com.

Energy Efficiency Financing Pilots

- » CPUC authorized the creation of the California Hub for Energy Efficiency (CHEEF) to establish financing pilot programs for various segments.
 - California Alternative Energy and Advanced Transportation Financing Authority (CAEATFA) is the program administrator.
 - Support from SoCalGas, SDG&E, PG&E, and SCE
- » Program Delivery Schedule
 - Residential, in-market
 - Small Business/Multifamily, target Q4 2018/Q1 2019
 - Commercial, target Q1 2019
- » Financing Pilots promoted through the GoGreen Financing brand.

What is GoGreen Financing?

- » GoGreen Financing (GGF) is the new face of energy efficiency financing for the State.
- » Financing programs and products featured on GoGreenFinancing.com
- » Partners section provides additional information and support materials



The screenshot shows the GoGreen Financing website homepage. At the top, there is a navigation bar with the logo and links for Home, Choose a Program, Find a Contractor, Find Financing, Partners, and Help. The main heading is "What is GoGreen Financing?" followed by a sub-heading: "Whether you want to reduce energy usage, improve the comfort and health of your home or business, or just want to 'go green,' you can find the solution you need. GoGreen Financing serves four broad property types." Below this, a section titled "Choose your property type" features four columns: Residential (Financing for homeowners and renters), Affordable multifamily (Financing for affordable multifamily housing owners), Small business (Financing for small business property owners and tenants), and Nonresidential (Financing for nonresidential property owners and tenants). Each column includes a representative image and a button with the property type name.

Residential Energy Efficiency Loan (REEL)

What is REEL?

- » The REEL program is designed to help California homeowners and renters access attractive financing for energy efficiency projects.

Who can use REEL?

- » The program is available to any California resident who owns or rents a 1-4 unit property and receives service from one of the investor owned utilities.

Why REEL?

- » No home equity required
- » Competitive rates
- » No Money down
- » No closing costs
- » Available to borrowers with a wide range of credit scores
- » Use up to 30% of loan amount for nonenergy efficiency upgrades
- » Broad list of energy efficiency projects
- » Reduce project costs with rebate or incentive

On-Bill Financing Program (OBF)

- » Offers **interest-free financing** for the purchase and installation of measures covered by SoCalGas® energy efficiency programs.
- » Allows customers to overcome cost barriers by providing financing and repayment of the loan on their gas bill.
- » The loan amounts are funded through a ratepayer pool of dollars and administered by SoCalGas.

Key Features

- ✓ Zero percent unsecured loan
- ✓ No origination fees
- ✓ No prepayment penalty
- ✓ No processing fees
- ✓ Finance 100% of installed project costs less the rebate/incentive
- ✓ No ongoing administrative fees

Program Loan Limits

PROGRAM LOAN LIMITS

CUSTOMER SEGMENT	LOAN AMOUNTS	MAX LOAN TERMS
BUSINESS	MIN. - \$5,000 MAX. - \$100,000	5 years or useful equipment life (whichever is shorter)
MULTI-FAMILY •Common area measures only	MIN. - \$5,000 MAX. - \$100,000	5 years or useful equipment life (whichever is shorter)
LOW INCOME MULTI-FAMILY •Common area measures only •65% of tenants must be income qualified	MIN. - \$5,000 MAX. - \$250,000	10 years or useful equipment life (whichever is shorter)
INSTITUTIONAL (CITIES, COUNTIES, SCHOOLS)	MIN. - \$5,000 MAX. - \$250,000	15 years or useful equipment life (whichever is shorter)
STATE OF CALIFORNIA	MIN. - \$5,000 MAX. - \$1,000,000	15 years or useful equipment life (whichever is shorter)

- » Recent program enhancements:
 - Business & Multi-Family loan terms increased up to 10 years.
 - Buy-down payback period available for all customers.
- » Note: The enhancements are available at program staff discretion.



Contact Information

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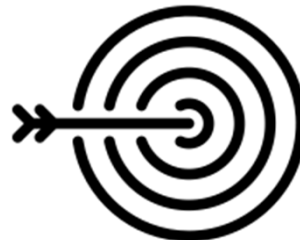
CAEATFA

CHEEF

cheef@treasurer.ca.gov

916.651.8157

Visit <https://www.treasurer.ca.gov/caeatfa/index.asp> for more information about the CHEEF and to subscribe to future financing pilot updates.



SOCALGAS SUPPLIER DIVERSITY PROGRAM

PRESENTER

Yolanda Padilla

Project Manager, Supplier Diversity, SoCalGas

SOCALGAS SUPPLIER DIVERSITY PROGRAM



General Order (GO) 156 was adopted by the Commission in 1986 to promote greater competition among utility suppliers by expanding the available supplier base and to encourage greater economic opportunity for business enterprises historically left out of utility procurement, which include:

Women
Minorities
Service Disabled Veterans
LGBT

SOCALGAS SUPPLIER DIVERSITY PROGRAM

Active Supplier Diversity effort for over 30+ years

Utilities Supplier Diversity Results are over 40%

“It’s Just How We Do Business”

Supplier Diversity Subcontracting Goal Form 40%

- Diverse Supplier
 - least 51% owned, controlled and management of daily operations
- Prime Contractors
 - * Subcontract to CPUC certified diverse suppliers
 - * Report results on SDG&E and SOCALGAS’ online portal

Become Certified

CPUC Supplier Clearinghouse
www.thesupplierclearinghouse.com

Service Disabled Veterans – Office of
General Services
www.getcertified.dgs.ca.gov

SOCALGAS SUPPLIER DIVERSITY PROGRAM



Yolanda Padilla
Project Manager, Supplier
Diversity, SoCalGas

BIDDING REQUIREMENTS

PRESENTER

Karen Mar

Solicitations Lead, SoCalGas

BIDDING REQUIREMENTS

Stay current on the solicitations efforts by monitoring these sites.

The screenshot shows the PEPMA (Proposal Evaluation & Proposal Management Application) website. The header includes the PEPMA logo and navigation links: Home, Pepma Application, Contact Us, FAQs, Logout, and a 'Logged in as: KMar' indicator. The main content area is titled 'Welcome to PEPMA' and describes it as a 'California Statewide Investor Owned Utilities (IOU) and Energy Efficiency Solicitation Website'. It lists four key functions: 1) Individuals and organizations to learn about IOU energy efficiency programs, 2) Potential bidders to self-register their information, 3) Learning about upcoming energy efficiency contracting opportunities, and 4) Exchange of bid information between individuals, organizations and IOUs. Below this, there is a 'Participating IOUs' section with logos for Southern California Edison Company, Southern California Gas Company, Pacific Gas and Electric Company, and San Diego Gas & Electric Company. At the bottom, there are sections for 'Contracting Opportunities', 'Register Now', 'Resources', and 'Upcoming Events' (the latter is circled in red).

The screenshot shows the California Energy Efficiency Coordinating Committee (CAEECC) website. The header includes navigation links: ABOUT CAEECC, MEETINGS, DOCUMENTS, CALENDAR, and CONTACT, along with a search bar. The main content area is titled 'Welcome to the California Energy Efficiency Coordinating Committee'. Below the title, it states: 'The California Energy Efficiency Coordinating Committee (CAEECC) provides a venue for stakeholders to discuss energy efficiency matters while ensuring transparent access'. On the right side, there is an 'Upcoming Events' section with a table listing an event: 'SoCalGas Webinar 2018-201 Energy Efficiency Solicitation' on Wednesday, August 29, 2018, from 10:00am-2:00pm.

<https://pepma-ca.com/Public/Default.aspx>

<https://www.caeccc.org/>

BIDDING REQUIREMENTS

PowerAdvocate[®]
A Verisk Business

HOME PRODUCTS SOLUTIONS MARKETS EVENTS RESOURCES COMPANY COST INSIGHTS

login Registration Contact Us

PowerAdvocate[®]

Providing supply market insight and solutions to the energy industry by combining best-in-class technology and services.

PowerAdvocate is now a Verisk Business

SPEND INTELLIGENCE COST INTELLIGENCE MARKET INTELLIGENCE SOURCING INTELLIGENCE CONTRACT INTELLIGENCE SUPPLIER INTELLIGENCE

Strategic Sourcing • Category Intelligence • Supplier Management • Capital Projects • Merger Integration

In the Spotlight Request a Demo Learn More

Check out our new blog:
Cost Insights
Intelligence for energy companies seeking a data-driven approach to cost management

Interested in learning more about one of our solutions?
Click here to request a demo

- About Us
- Careers
- Contact Us
- Contact Support

Power Advocate™
The primary software technology platform that all Sempra Energy Utilities bids will be processed through.

PowerAdvocate Technical Support: (857) 453-5800
support@poweradvocate.com

<http://marketing.poweradvocate.com/>

BIDDING REQUIREMENTS

<http://marketing.poweradvocate.com/>

Click to view Supplier Intelligence Dashboard

Click to view Contract Intelligence Dashboard

Buyer filter

Navigation bar

PowerAdvocate

Dashboard Profile Company Help Logout

Events Portals Contracts

Dashboard

Company Filter: All Companies

Fill-In Data Sheets

Event / Buyer	Msg	Open	Close	Download Documents	Upload Documents	Commercial	Technical	Pricing
190-cbl-1: 190 First St. Cable/Wiring Electric Power Utility		05/16/10 8:00 AM EDT	06/08/10 4:00 PM EDT	1	2	3	4	5
T42g: Colorado River Sluice Gates Great Western Utilities	1/1	04/04/10 10:00 AM EDT	06/30/10 4:00 PM EDT	1	2	3	4	5
1998-01: Grid Expansion Electric Power Utility		09/01/10 8:00 AM EDT	12/29/10 4:00 PM EST	1	2	3	4	5

Buying entity

Click to view the event's Status tab

Number of unread/total messages
Click to view the event's Messaging tab

Click numbers to view event tabs

Datasheet available

No datasheet available

Open & Pending Pre-Bid events

Pending (no Pre-bid) and Closed events

BIDDING REQUIREMENTS

<http://marketing.poweradvocate.com/>

Status **1. Download Documents** 2. Upload Documents 3. Commercial Data 4. Technical Data 5. Pricing Data Messaging

Pre-Bid **Bid**

Select All Download Selected Files Clear All

Technical Information

Document Description	Issue Date	Ref ID	Rev #	File Name	File Size	Download
Pier23 Pilings RFP	5/30/10	133-01	C	p23 pile.pdf	742 KB	

Status 1. Download Documents **2. Upload Documents** 3. Commercial Data 4. Technical Data 5. Pricing Data Messaging

Pre-Bid **Bid**

Upload Bid Proposal

Document Type * Issue Date Reference ID * Required Field

[Select from List] 01/06/2011

Select File(s) Location Selected File(s)

p23 abp_rev2.pdf X Submit Document

p23 eir.pdf X

Bid Submissions

Commercial

Document Description	Issue Date	Ref ID	File Name	File Size	Upload Date	Actions
Pier 23 Architectural	6/01/10	133-22	p23 abp.pdf	420 KB	6/01/10	

BIDDING REQUIREMENTS

<http://marketing.poweradvocate.com/>

Bidder should complete the Supplier Info Tab under 3. Commercial Data section.

The screenshot shows a web application interface with a navigation menu. The menu has five main tabs: 'Status', '1. Download Documents', '2. Upload Documents', '3. Commercial Data', and '5. Pricing Data'. The '3. Commercial Data' tab is highlighted in blue. Underneath it, there are four sub-tabs: '1. Supplier Info ...', '2. M&WBE Rep ...', '3. Company - 27 ...', and '4. Commercial'. The '1. Supplier Info ...' tab is also highlighted in blue. To the right of the sub-tabs is a 'Printable' icon. At the bottom of the interface, there is a 'Save Data' button and a warning message: 'Your information can be changed after it is saved. If you leave this page without saving it first, you will lose all unsaved data.'

BIDDING REQUIREMENTS

<http://marketing.poweradvocate.com/>

Supply Management manages all communications during the solicitation process.

The screenshot displays the 'Messaging' section of the PowerAdvocate portal. At the top, there are navigation tabs: 'Status', '1. Download RFP', '2. Upload Proposal', '3. Commercial Data', '4. Technical Data', '5. Pricing Data', and 'Messaging'. Below these tabs is a 'Create New Message' button (circled in red), a search bar labeled 'Search Inbox:' with a 'Search' button, and a 'Send email notifications?' option with 'Yes' selected. The main area shows an 'Inbox (3)' with a 'New/Unread (1)' indicator. The inbox contains three entries:

Status	Date	From	Company	Subject
	9/29/07 2:58 PM EDT	Peter Holm	Elsbeth International	engineering specialist
	9/29/07 2:53 PM EDT	Cindy Walsh	Electric Power Utility	site visit rescheduled
	9/29/07 2:52 PM EDT (3)	Cindy Walsh	Electric Power Utility	structural specialist

Below the inbox are sections for 'Sent (1)' and 'Drafts (1)'.

PowerAdvocate Technical Support: (857) 453-5800
support@poweradvocate.com

DISCUSSION and Q&A

SOURCES:

<https://pepma-ca.com>

<http://marketing.poweradvocate.com>

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

<https://www.socalgas.com/regulatory/efficiency/index.shtml>

THANK YOU!