

**SOUTHERN CALIFORNIA EDISON COMPANY'S
2021-2026 ENERGY SAVINGS ASSISTANCE (ESA) PROGRAM
SOLICITATION PLANS**

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OVERVIEW

At this time, Southern California Edison Company (“SCE”) plans to run the following Energy Savings Assistance (“ESA”) Program solicitations in 2021 to 2022 for Program Years 2021-2026.

1. ESA Single Family Core Program
2. ESA Equipment Vendors
3. Joint SCE and SoCalGas ESA Pilot Plus/Pilot Deep
4. ESA Building Electrification Pilot (BE Pilot)
5. ESA New Construction BE Pilot (Clean Energy Homes)
6. ESA Pilot Evaluation
7. ESA Inspections
8. ESA System
9. ESA Interactive Energy Education

SCE’s Solicitation Plan describes its strategy for conducting one-stage Request for Proposal (“RFP”) competitive solicitations for the above mentioned ESA programs and incorporates the specific requirements outlined in Decision (D.) 21-06-015¹, Ordering Paragraph (“OP”) 109. The OP directs Pacific Gas and Electric Company (“PG&E”), SCE, Southern California Gas Company (“SoCalGas”) and San Diego Gas & Electric Company (“SDG&E”) also known as the Investor Owned Utilities (“IOUs”) to jointly communicate to the proceeding service list within 90 days after the approval of this Decision, the:

- a) Projected solicitation timing,
- b) An overview of stages/process the solicitation will follow,
- c) The platforms/websites bidders can expect to find, or be alerted of upcoming solicitations,
- d) Any other already known contract scope, bidder eligibility requirements, or other information to help potential bidders prepare, and
- e) Whether a Procurement Review Group (“PRG”) and Independent Evaluator (“IE”) will be used in the solicitation process.

a) Projected Solicitation Timing

Figure 1: SCE’s ESA Program Solicitation Timeline*

¹ D.21-06-015, OP.109 directs IOUs to jointly communicate their solicitation plans.

Year	2021						2022						2023																	
Quarter	Q3		Q4		Q1		Q2		Q3		Q4		Q1		Q2		Q3		Q4											
Month	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ESA Single Family Core Program	RFP Prep / Advice Letter filing & approval						RFP	Contract Negotiations		Contract Awards & Issuance																				
ESA Equipment Vendors		RFQ Prep					RFQ	Contract Negotiations		Contract Awards & Issuance																				
Joint SCE and SoCalGas ESA Pilot Plus & Pilot Deep	RFP Prep / Workshop / Advice Letter filing & approval						RFP	Contract Negotiations		Contract Award & Issuance																				
Building Electrification Pilot		RFP Prep		RFP		Contract Negotiations		Contract Award & Issuance																						
New Construction BE Pilot (Clean Energy Homes)		RFP Prep		RFP		Contract Negotiations		Contract Award & Issuance																						
Pilot Evaluation			RFP Prep		RFP		Contract Negotiations		Contract Award & Issuance																					
ESA Inspections			RFP Prep		RFP		Contract Negotiations		Contract Award & Issuance																					
Interactive Energy Education						RFP Prep		RFP	Contract Negotiations		Contract Award & Issuance																			
ESA System	RFP Prep					RFP	Contract Negotiations		Contract Award & Issuance																					

* The timelines in Figure 1 are estimates and subject to change².

Figure 1 is an overview of SCE’s proposed solicitation timeline. The one-stage RFP process for all ESA program solicitations will take approximately 8 to 12 months. Subcomponents of the solicitations, described in detail in section “b” below, within the timeframes include:

- RFP Development,
- Bidder Workshop/Vendor Outreach and Training,
- Release of the RFP,
- Bidder Interest Form,
- Zone of Silence
- Bidders’ Conference,
- Scoring and Evaluating RFP Responses (Proposals),

² Joint IOU’s, together with Energy Division, will conduct at least one workshop with stakeholders to introduce the preliminary implementation plans for the Pilot Plus and Pilot Deep program and seek stakeholder feedback within 120 days after the approval of the decision. SCE will file a Tier 2 advice letter no later than 90 days after the first pilot workshop to detail the program implementation plan. Joint IOU’s must submit a Tier 2 advice letter within 90 days after the approval of the decision to identify program measures within each treatment tier and update the program portfolio measure mix as proposed in their applications. The Joint SCE and SoCalGas Pilot Plus and Pilot Deep, the ESA Single Family Core and ESA Equipment Vendor solicitation timelines may be impacted by these activities.

- Bidder Selection (Short Listing of Bids),
- Contract Negotiations and Award

During this solicitation timeframe, SCE will continue providing its existing programs so that low-income customers have access to similar levels of service. SCE proposes a ramp down of current program activities. SCE will ramp up/transition the onboarding of new ESA program contractors to implement newly designed and approved program policies and procedures through this 2021 to 2022 ESA solicitation process. These new program policies and procedures will focus on a customer-need based targeted approach for specific households. SCE may launch future RFPs as needed depending on the needs of the ESA portfolio. The timelines in Figure 1 are estimates and subject to change.

The Southern Multifamily Whole Building (“MFWB”) program will be led by SDG&E as the lead IOU managing the MFWB solicitation process and program management activities for the southern region and therefore SCE does not incorporate reference to the MFWB solicitation in its plan. SCE will contribute funding to the southern MFWB program and will advise SDG&E throughout the solicitation process.

b) An Overview of the Process the Solicitation will Follow

Each of SCE’s proposed ESA program RFPs will follow a one-stage solicitation process for third-party vendors. Any deviations or exceptions to the process described below will be detailed in the specific solicitations when they are released.

RFP Development

During the RFP Development stage, SCE will develop the work specifications or statement of work (“SOW”), proposal evaluation scoresheets with detailed evaluation criteria, and other related documents in support of bidders and in compliance with California Public Utilities Commission (“CPUC” or “Commission”) direction. Table 1 below provides illustrative examples of the types of information and requirement specifications that may be included in the solicitation RFP instructions package:

Table 1: Overview of Sample Content Included in RFPs

Sample RFP Instruction Content
<ul style="list-style-type: none"> • RFP – Rules of Engagement • Registration Requirements • Proposal Submittal Procedures • Timelines, Milestones, and Deadlines • Bidders' Conference Detail • Evaluation, Measurement and Verification ("EM&V") Standards/Guidance • Performance Metrics/Key Performance Indicators ("KPIs") • Proposal Evaluation Criteria • Diverse Business Enterprise ("DBE") Goals and Commitments • Sustainability Questionnaire • Cybersecurity and Privacy Impact Assessment Review Status • Solicitation Requirements (as determined by opportunity, gap, sector, etc.) • Standard Terms and Conditions ("Ts&Cs")

Bidder Workshop/Vendor Outreach and Training

SCE understands the need to engage and educate potential bidders since many of ESA's current service providers are Community Based Organizations (CBO's). SCE plans to hold a series of web-based vendor pre-RFP Conference and Training workshops to provide prospective bidders general information on essential administrative requirements such as cybersecurity, contractor safety requirements, insurance requirements, third-party security review and data access requirements, diverse businesses, and other basic qualifications (e.g., what constitutes an acceptable bid, qualification process, etc.). The trainings will also include an overview of income qualified program-related resources and where to locate them (e.g., recent Commission decisions, etc.). In some instances, the trainings may be recorded and posted on SCE's website so they can be accessed at any time by all prospective bidders.

Release of the RFP

SCE will set up (or update) a page on the Ariba® platform for release of the RFP to bidders. To receive a bid invitation, bidders must be registered on Ariba®³. Prior to the release of a solicitation, SCE will notify prospective bidders of the upcoming solicitation and release dates.

³ <http://sce.supplier.ariba.com/register>

To receive notifications of these bid opportunities, bidders will need to be registered on the statewide Proposal Evaluation & Proposal Management Application (“PEPMA”)⁴. These notices will include the type of solicitation and any required prequalification (e.g., licenses, experience in energy management, etc.). SCE will instruct third parties to register for the solicitation and will direct them to additional sites as needed. For additional information on notifications see Solicitation Notification below under section “c”.

Potential bidders will be instructed to prepare a full and detailed program proposal for each solicitation a bidder applies. To the extent possible, SCE intends to provide RFP participants with the necessary data to enable them to design and propose the highest quality proposals.

Bidder Interest Form

SCE will release a Bidder Interest form to gauge bidder interest in specific solicitation participation across the multiple solicitations. A link to the form is in the footnote and will be included in the various communication channels (i.e., direct email communications, and websites including PEPMA-CA.com, SCE.com pages). SCE will encourage all potential bidders to complete the form⁵.

Zone of Silence

The “zone of silence” is a period that begins when the RFP is released to bidders and there is restricted and structured communication between the bidders and SCE personnel. The zone of silence remains in effect until SCE’s Supply Management notifies all bidders of down-selection and non-selection. This ensures a fair, transparent, and competitive process for all bidders and SCE that must be adhered to by all parties.

Bidders’ Conference

The bidders’ conference provides an opportunity for prospective bidders to ask questions and get clarification of the requirements for submitting a proposal. SCE plans to host bidders’ conferences and respond to questions from third parties to provide information that will enable them to respond to the solicitations. The bidders conference is usually held online, via the Microsoft Teams application⁶, as a webinar. All questions submitted by solicitation participants and SCE’s corresponding responses will be posted publicly on the Ariba® message board, so all respondents have equal access to solicitation information provided by SCE.

⁴ PEPMA can be accessed at <https://www.pepma-ca.com>.

⁵ [SCE Bidder Interest Form](#)

⁶ Microsoft Teams is an online chat-based collaboration platform in Microsoft 365 complete with document sharing, online meetings, and other useful features for business communications.

Scoring and Evaluating RFP Responses (Proposals)

After bids are submitted, SCE will conduct its competitive evaluation process. Proposals will be evaluated by means of commercial and technical criteria. Table 2 provides illustrative examples of the types of criteria used in evaluating RFP responses.

Table 2: Overview of Sample Commercial and Technical Evaluation Criteria

Commercial Evaluation	Technical Evaluation
<ul style="list-style-type: none"> • Costs and/or pricing • Conformance with contractual terms and conditions • Qualifications to meet financial, safety, DBE, cybersecurity, and other commercial SCE corporate requirements. 	<ul style="list-style-type: none"> • Regulatory compliance • Conformity with the technical (work) specifications • Established work standards • Ability to meet marketplace needs • Ability to perform the work on schedule • Knowledge and technical competence in performing work • Experience in the field • History of positive customer satisfaction • Financial standing • Qualifications of key personnel who will perform the work, and • References.

Bidder Selection

SCE intends to shortlist the most competitive bidders based on their RFP proposal. The most competitive bidders may be invited to answer specific questions and provide presentations during in-person and/or video/tele-conferenced interview to ensure the bidders can further define and explain to SCE’s satisfaction how or when they will have the ready and able resources to successfully deliver as specified in their proposals. If the most competitive bidders are invited to a smaller subset of interviews, the topics will strictly relate to the most challenging components of their program implementation proposals and ability to successfully deliver on the proposal or other complexities such as new and innovative program concepts requiring further discussion.

Contract Negotiations and Award

SCE will send notifications to unsuccessful bidders and prepare the notifications to the down-selected bidders to begin contract negotiations. During contract negotiations, SCE will work with the successful bidders to finalize pricing, general terms and conditions, and specific terms based on program requirements. Once the development of the Statement of Work for the Purchase Order (“PO”) is completed, SCE will facilitate signing of contracts and issuance of PO’s.

c) The Platforms/Websites Bidders Can Expect to Find, or be Alerted of Upcoming Solicitations

Solicitation Notification

SCE plans to use several channels to cast a wide net to all competitive bidders regardless of their past awareness of the ESA program to notify participants and interested stakeholders about the solicitations. These channels include but are not limited to: PEPMA-CA.com website, SCE's Supply Management organizations SAP® Ariba® Sourcing website, and the California Energy Efficiency Coordinating Committee ("CAEECC") website.

SCE also plans to provide notice to various CPUC service lists in proceedings that are related or impact the ESA income-qualified communities of the solicitations as they are released for bidding. Examples of these proceedings are, Low Income (A.19-11-003 et. al.), Energy Efficiency (R.13-11-005), Disadvantaged Communities in San Joaquin Valley (R.15-03-010), and, Building Decarbonization R.19-01-011 and California Solar Initiative, Self-Generation Incentive Program and Other Distributed Generation Issues R.12-11-005 - service lists.⁷ Prospective bidders can be registered on the PEPMA-CA.com website and will be able to access market notifications since bid information is posted on the site. To receive a formal bid invitation, bidders must be registered in Ariba®.

SCE will also be creating an Income Qualified Programs ("IQP") Solicitation webpage on sce.com that will have resources for third-parties that may include information such as, the schedule for upcoming solicitations, overview of the solicitation process, frequently asked questions ("FAQ's"), regulatory information and links to both the PEPMA-CA.com and SAP® Ariba® websites. SCE may also use SCE's Supplier Diversity Program for suppliers that are DBE certified to alert DBE's of upcoming solicitations.

d) Any Other Already Known Contract Scope, Bidder Eligibility Requirements, or Other Information to Assist Potential Bidders

The descriptions below provide an overview of each of the ESA programs SCE is expected to issue solicitations sorted by program or programmatic support needs. The goal is to provide potential bidders with the information that is currently available, to help effectively design program proposals that meet SCE's portfolio needs. This scope of each RFP is preliminary and subject to change based on future needs of the program(s).

ESA Single Family Core Program

- The ESA Single Family Core Program will remain SCE designed and implemented. SCE will also maintain the program administration and design of the ESA Single Family Core program offering.

⁷ R.12-11-005 and R.15-03-010 are closed but the service lists are still available on the CPUC's website.

- SCE will conduct competitive solicitations to acquire ESA contractors (“suppliers”) that will implement the programs. The intended outcome of this solicitation is to award contracts to multiple suppliers with a goal of creating competition and addressing the expanded locational needs of SCE’s extensive service areas.
- SCE expects that the successful suppliers will carry out both the Tier 1 Standard and Tier 2 Enhanced Package treatment levels in ESA eligible households. SCE expects suppliers to be responsible for procuring “non serialized” measures for the program such as, bulbs, smart power strips, etc. “Serialized” measures, such as refrigerators, freezers, HVAC systems, etc., will be ordered from equipment suppliers and procured by SCE.
- SCE will have specific bidder eligibility requirements listed in the RFP. At a minimum, bidders will be required to have experience delivering a similar program, either directly, through partners or subcontractors. Although subject to change, SCE intends to require the following for all participating bidders: CSLB License. C-20 - Warm-Air Heating, Ventilating and Air-Conditioning Contractor, and ISNet Certification. SCE expects suppliers to provide high quality installations to ensure deep energy savings, health, comfort, and safety, and appropriate useful life of the installed measures is a priority.

ESA Building Electrification Pilot

- The ESA Building Electrification Pilot (“BE Pilot”) will be implemented by a single third-party Program Implementer (“PI”) that is chosen through the competitive solicitation process.
- The PI will be responsible for developing and executing an implementation plan closely following the program scope detailed in SCE’s application submission and any subsequent direction provided by Commission approval.
- The PI will be expected to qualify, on-board and manage qualified installers through the entire programmatic process to ensure all deliverables outlined in the solicitations are successfully completed.
- The PI will be expected to fully leverage the ESA Single Family Core Program measures; work with contractors of the Core Programs and coordinate and streamline installations with planned building electrification activities.
- The PI will also be expected to coordinate with available clean energy and energy efficiency (“EE”) programs such as, Technology and Equipment for Clean Heating (“TECH”), Self-Generation Initiative Program Heat Pumps and Water Heaters (“SGIP HPWH”), Disadvantaged Communities – Single-family Solar Homes (“DAC-SASH”) to layer or stack incentives to buy down equipment/installation costs, and/or to provide additional products or services to pilot participants. Additionally, information sharing may be necessary to ensure the proper timing and locations of treated homes.
- SCE will have specific bidder eligibility requirements listed in the RFP. At a minimum, bidders will be required to have experience delivering similar EE programs, either directly, through partners or their subcontractors.

Joint SCE and SoCalGas ESA Pilot Plus and Pilot Deep

- Jointly, SCE and SoCalGas will select a single third-party PI to deliver the Pilot Plus and Pilot Deep gas and electric program services. Specific services and measures will be subject to approval of SCE/SoCalGas' Advice Letter expected to be filed in January 2022.
- The PI will qualify, on-board and manage qualified installers, as necessary.
- The PI will be expected to coordinate and streamline installations and services with planned Pilot activities.
- The PI will be expected to perform the following tasks:
 - Develop Joint-Pilot process and procedures, including:
 - Monitoring contractors to perform customer verification, on-site audit, test-in/out, and use of energy-modeling software, as required to establish the program path,
 - Managing high-quality installations and project completions, and
 - Interfacing with the QA/QC vendor to support verification and inspections.
 - Update project documentation to support a project tracking system and online project folders, including:
 - Performing Joint-Pilot customer engagement and project tracking,
 - Project problem alerting and resolution, including project cycle-time reporting,
 - Generating different reports to meet project milestones: (per home basis)
 - Reported energy savings (deemed and calculated).
- The PI or its subcontractors will be expected to:
 - Conduct detailed whole-home energy audits, test-in, and energy modeling to estimate energy savings potential and document problems.
 - Identify necessary solutions according to the ranked priority and meet per-home budget requirements.
 - Follow recognized building standards established by building science experts.
- The PI will work with SCE and SoCalGas to establish program rules for home remediation, project resource prioritization, Pilot program reporting, and tracking activities, guided by the CPUC approved Implementation Plan.
- SCE will have specific bidder eligibility requirements listed in the RFP. At a minimum, bidders will be required to have experience delivering a similar program, either directly, through partners or subcontractors. Although subject to change, SCE intends to require the following for all participating bidders: CSLB License. C-20 - Warm-Air Heating, Ventilating and Air-Conditioning Contractor, and ISNet Certification, BPI certification.

Pilot Evaluation

- SCE will conduct competitive solicitations to acquire an evaluator for the ESA Pilots. The known scope of work for the evaluator will be:
- Pilot Plus and Pilot Deep:

- Based on Pilot objectives (energy savings), develop study and sampling design as well as method and approach to assess the impacts
- Conducting the study and sampling design,
- Conducting pre-installation analysis of target population and developing a control or comparison group
 - This exercise may take place annually.
- Designing and implementing pre- and post-installation participant surveys,
 - This exercise may involve post-installation contractor surveys as well.
- Conducting pilot evaluability assessment and process evaluations,
- Conducting impact evaluations.
- ESA Building Electrification Pilot:
 - Developing metrics and evaluation criteria based on stated pilot objectives
 - Develop and execute embedded M&V Strategy including identification of data to collect as part of the implementation
 - Conducting a process evaluation
 - Conducting an impact evaluation
 - Conducting an economic feasibility evaluation
- Clean Energy Homes
 - Developing metrics and evaluation criteria
 - Conducting an early M&V study
 - Conducting a process evaluation
 - Conducting an impact evaluation
 - Conducting an economic feasibility evaluation
- SCE expects to award a single contract for this work.

New Construction Building Electrification Pilot or Clean Energy Homes

- The New Construction Building Electrification (“BE”) Pilot (“Clean Energy Homes Pilot”) will be implemented by a single third-party PI.
- The PI will be responsible for developing and executing an implementation plan closely following the program scope detailed in SCE’s application submission.
- The Clean Energy Homes Pilot will provide incentives for low income housing developers to incorporate electrification into the designs of new construction by providing incentives and design assistance to affordable housing developers to reduce greenhouse gas (“GHG”) emissions.
- The Clean Energy Homes Pilot will also provide coordinated education and outreach provided during the development process and through post-occupancy.
- Involves coordination with the California Energy Commission’s (“CEC’s”) forthcoming Building Initiative for Low Emissions Development (“BUILD”) program and the Statewide Energy Efficiency California Energy-Smart Homes Program (“CESHP”), All-Electric Residential, to increase customer opportunities and avoid duplication.

SCE

- SCE will have specific bidder eligibility requirements listed in the RFP. At a minimum, bidders will be required to have experience delivering a similar program, either directly, through partners or subcontractors.

ESA Inspections

- SCE will conduct competitive solicitations with the intent of awarding at least two (2) contracts to two (2) inspection suppliers.
- SCE expects that the inspection suppliers will perform inspection work for the ESA Single Family Core Program and the ESA Pilots (BE Pilot, Pilot Plus & Pilot Deep, and New Construction BE Pilot). This scope is preliminary and subject to change based on future needs of the program(s).
- SCE will have specific bidder eligibility requirements listed in the RFP. Although subject to change, SCE intends to require the following for all participating bidders: ISNet Certification, HERS Rater Certification.

ESA Equipment Vendors

- SCE will conduct competitive solicitations to contract ESA vendors that will provide measures for the ESA program(s). The intended outcome of this solicitation is to award contracts to multiple equipment vendors.
- The scope of work to be solicited for is the procurement of serialized measures (i.e. refrigerators, freezers, HVAC systems, etc.) for the ESA Single Family Core Program and ESA Pilots (BE Pilot, Pilot Plus & Pilot Deep). This scope is preliminary and subject to change based on future needs of the program(s).
- SCE will use the solicitation process to gather information on healthy building materials and will consider the incorporation of healthy building materials in bid proposals⁸. The scope of work to be solicited for will also include appliance warranty and customer issue resolution services.

ESA System

- SCE is in the process of exploring options for a new program workflow management system to replace the existing Energy Management Assistance Partnership System (“EMAPS”).

ESA Interactive Energy Education

- The scope of work to be solicited for will be to develop interactive style video modules to provide an overview of the ESA program(s). The intent of the customized online energy education module is to replace the hard copy education booklets and be designed so that customers can access the tool at their convenience. Please note this scope of work is preliminary and subject to change based on future program needs being identified.

⁸ D.21-06-015, OP.67 directs IOUs to gather information to consider the Energy Savings Assistance program’s contractors’ use of healthy building materials through the contract solicitation and request for proposal process.

SCE

- SCE expects this supplier develop content for all ESA programs, including, but not limited, to the ESA Single Family Core program, BE Pilot, Pilot Plus/Pilot Deep and the Clean Energy Homes Pilot.

e) Procurement review Group and Independent Evaluator in the Solicitation Process

SCE does not intend to use a PRG and IE process for any of the ESA program solicitations mentioned above in section “d.” However, the PRG and IE process will be used for the southern MFWB program solicitation managed by SDG&E.

For questions regarding this SCE ESA Program solicitations service list communications, please contact Rosette Solidum at Rosette.Solidum@sce.com or Joni Key at Joni.Key@sce.com.