

**SOUTHERN CALIFORNIA GAS COMPANY
ENERGY SAVINGS ASSISTANCE PROGRAM
SOLICITATION PLAN
2021-2026**

SOCALGAS SOLICITATIONS OVERVIEW

At this time, SoCalGas plans to run the following Energy Savings Assistance (ESA) Program solicitations for Program Years 2021-2026:

- a) Delivery of In-home Program Services
- b) Customer Experience Technology Platform
- c) Customer On-line Audit (Energy Audit)
- d) Pilot Plus/Pilot Deep (developed jointly with SCE)

1. SoCalGas Solicitation Scopes:

- a) Delivery of In-home Program Services, Q1 2022
 - i) New capabilities and/or measures: solar thermal water heating measure, comprehensive home health and safety check-up measure including smoke alarms and carbon monoxide detectors.
 - ii) Existing capabilities and/or measures: outreach, water measures, weatherization measures, attic insulation, appliance measures
 - iii) Inspections
- b) Customer Experience Technology Platform, Q1 2022
 - i) Program workflow management system to replace the existing HEAT system
 - ii) Digital customer engagement including customer self-service capabilities, and digital contractor enablement (program “uberization”)¹.
- c) Customer On-line Audit – Q1 2022. (May be incorporated into technology platform solicitation)
 - i) On-line audit tool at the time of enrollment to gather additional home information prior to a home visit.
- d) Pilot Plus/Pilot Deep (developed jointly with SCE), Q1 2022²
 - i) Delivery of Pilot Plus and Pilot Deep gas and electric program services. Specific services and measures will be subject to approval of SoCalGas’ Advice Letter expected to be filed in October 2021.³

¹ SoCalGas A.19-11-006, Prepared Direct Testimony of Mark Aguirre and Erin Brooks at 22.

² D.21-06-015 Ordering Paragraphs (OP) 38 – 42 and Attachment 2.

³ D. 21-06-015, OP 41.

2. SoCalGas Solicitation Process:

SoCalGas aims to develop an open, fair, and competitive process that will enable vendors to create high quality proposals, facilitate IOU coordination, and focus review and oversight resources on areas of highest potential. To execute this strategy, SoCalGas is expected to utilize a three-stage solicitation process for all scopes stated in section 1. SoCalGas Solicitation Scopes. SoCalGas does not intend to use a Procurement Review Group nor an Independent Evaluator.

The three-stage process will be conducted as follows:

- a) **Stage 1: Request for Qualification (RFQ)** – Potential bidders are instructed to submit qualifications to provide services that are reflected in the scopes of work. The most competitive participants will be notified that they have been shortlisted and will proceed to the Stage 2: Request for Proposal (RFP).
- b) **Stage 2: Request for Proposal** – If selected from Stage 1: Request for Qualification, potential bidders will be instructed to prepare a full program proposal. To the extent possible, SoCalGas intends to provide RFP participants with data to enable them to design and propose the highest quality programs. Proposals will be evaluated by means of qualitative and quantitative criteria. The most competitive participants will be notified that they have been shortlisted and will proceed to Stage 3: Bidder Selection.
- c) **Stage 3: Bidder Selection** – SoCalGas intends to shortlist the most competitive bidders based on their RFP proposal. This smaller set will be invited to answer specific questions and provide presentations during in-person and/or video/tele-conferenced interviews upon which a winning bidder will be selected. SoCalGas and the selected bidder will then move onto contract development.

Figure 1 below provides examples of solicitation requirements for both Stage 1 and Stage 2, as applicable:

Figure 1: Proposed SoCalGas ESA Program Solicitations Requirements

Stage 1: Request for Qualification

- Potential Bidders are instructed to provide qualifications to provide services reflected in the scopes of work and may include, as applicable:
 - Safety statistics including ISN grade
 - Licenses
 - Insurance
 - Experience in delivering ESA Program services or equivalent services
 - Training program
 - Personnel screening
 - Cybersecurity
 - Quality Control
 - Customer Service
 - Mobilization Capability
 - Knowledge of and ability to reach targeted communities
 - Ability to employ people from the local area
- The most competitive participants will be notified that they have been shortlisted and will proceed to the Request for Proposal Stage (Stage 2).

Stage 2: Request for Proposal

- If selected, from Stage 1, potential bidders will be instructed to prepare a full program proposal and may include, as applicable:
 - Registration Requirements
 - Proposal Submittal Procedures
 - Timelines, Milestones, and Deadlines
 - Bidders' Conference Detail
 - EM&V Standards / Guidance
 - Performance Metrics / KPIs
 - Evaluation Criteria
 - Diverse Business Enterprise Goals and Commitments
 - Supplier Diversity and Sustainability Questionnaire
 - Cybersecurity Review Status
- Proposals will be evaluated by means of qualitative and quantitative criteria
- The most competitive participants will be notified that they have been shortlisted and will proceed to the Bidder Selection Stage (Stage 3)

3. Solicitations TimeLine

Figure 2 below outlines SoCalGas’ projected solicitation timeline for the delivery of ESA program in-home program services, customer experience technology platform, customer online audit and delivery of ESA Pilot Plus/Pilot Deep in-home services (developed jointly with SCE)

Figure 2: Projected SoCalGas ESA Program Solicitation Timeline

Solicitation Scope	2021		2022				2023		
	Q3	Q4	Q1	Q2		Q3	Q4	Q1	
Delivery of ESA In-Home Program Services	RFQ/RFP Prep		RFQ	RFP		Bidder Selection	Contract Negotiations	Execute Contracts	Launch
Customer Experience Technology Platform	RFQ/RFP Prep	RFQ	RFP	Bidder Selection	Contract Negotiations	Execute Contract	Design and Implementation		Launch
Customer Online Audit	RFQ/RFP Prep	RFQ	RFP	Bidder Selection	Contract Negotiations	Execute Contract	Design and Implementation		Launch
Delivery of Pilot Plus/Deep In-Home Program Services (jointly with SCE)	RFP Prep	RFP	Contract Negotiations	Execute Contract			Launch		

4. Solicitations Support

A prepared and informed bidder pool is foundational to the success of SoCalGas’ solicitations. SoCalGas will participate in the joint IOU use of multiple channels to ensure widespread notification of solicitations. The IOUs plan to prepare and educate the marketplace for the upcoming solicitations which may include outreach events and “bidders conferences.” Such support will be especially valuable to new participants. SoCalGas will work with the other IOUs to seek vendor and stakeholder feedback, and incorporate lessons learned to maximize outreach and education of potential participants in competitive solicitations. Training may be held jointly by the IOUs and recorded to provide convenient access by prospective bidders.

a. Solicitation Notification.

SoCalGas plans to use several channels to notify participants and interested stakeholders about program solicitations. SoCalGas may hold additional solicitations as the program cycle progresses and will communicate these plans to the service list at the time they are known. These channels include but are not limited to: Proposal Evaluation & Proposal Management Application (PEPMA), Power Advocate, SoCalGas website at www.socalgas.com, the California Energy

Efficiency Coordinating Committee (CAEECC) website [at www.caeecc.org](http://www.caeecc.org), and the R.13-11-005 and A.17-01-013 service lists.

b. Vendor Outreach and Training

The IOUs plan to hold a series of in-person vendor training workshops to provide prospective bidders general information on essential administrative requirements for successful participation in the Request for Proposals (RFPs). Presentations will include topics such as basic qualifications (e.g., what constitutes an acceptable bid, and qualification process); compliance requirements, such as cyber and third-party security review, data access requirements, and contractor safety requirements, discussed above; insurance and diverse businesses requirements. The training will also include an overview of low-income program related resources and where to locate them, such as the Statewide ESA Program Policy and Procedures Manual, the ESA Program California Installation Standards Manual, the California Standard Practice Manual, and the cost-effectiveness tool ESA Cost Effectiveness Test (ESACET), etc.

SoCalGas will provide a timely update to the proceeding service list to the extent new solicitation opportunities arise during the program cycle.

For questions regarding this SoCalGas ESA Program solicitations service list communications, please contact Cesar Callejas at ccallejas@socalgas.com or Karen Mar at kmar@socalgas.com.