

NOTIFICATION

San Diego Gas & Electric Energy Savings Assistance Program Pilot Plus/Pilot Deep Request for Proposal

Introduction

As part of San Diego Gas & Electric's ("SDG&E") solicitation schedule, and to comply with D.21-06-015, SDG&E will be requesting proposals that will serve the SDG&E service territory for the Energy Savings Assistance (ESA) Pilot Plus/Pilot Deep (Pilot) segment. SDG&E will serve as the Program Administrator for the Pilot. The RFP Solicitation will consist of a single-stage Request for Proposal ("RFP"), followed by a two-step selection process¹ beginning in **February 2022**.

The service territory consists of:

San Diego Gas & Electric provides safe and reliable energy service to 3.6 million people through 1.4 million electric meters and 873,000 natural gas meters in San Diego and southern Orange counties. Their service territory covers an area of 4,100 square-miles and spans 2 counties and 25 communities. San Diego, California has a diversity of climates not seen in other states, and the statewide provisions adopted into the California Energy Code accounts for these variations using a set of sixteen climate zones. SDG&E's service territory has several different climate zones where energy efficient pilot measures may be based on climate zones to achieve the most energy savings in a home.

Pilot Vision:

The vision of the Pilot is to create deeper energy savings through greater investments per household. The expectation is that the investment will yield deeper energy savings through a comprehensive and innovative program approach. SDG&E's primary goal for the Pilot, is to drive deeper energy savings. The Pilot Plus measure packages should include measures that yield between 5-15% energy savings, while the Pilot Deep package measures should go beyond that and yield between 15-50% energy savings.

In addition to the Pilot vision, the following section summarizes additional pilot guidelines and associated objectives to be included in proposals for design and implementation of the Pilot.

Deep Energy Savings:

- The proposed measures should go beyond the IOUs' approved measure packages to achieve deeper energy savings.
- The proposed implementation plan should address the intended balance between Pilot Plus and Pilot Deep measure packages, and how the proposed model will provide both measure packages in enough volume (i.e., number of households participating) to substantiate a useful evaluation of each measure.

¹ D.21-06-015 at 355 and Attachment 4, Section 1.

- The proposed implementation plan should include efforts to track implementation activities in such a way as to enable data collection and analysis of the measure delivery strategy, the level of investment required to perform much deeper retrofits in both Pilot treatment packages, and the actions taken to achieve savings, all of which is intended to support Pilot evaluation.

Equity

- The proposed design and implementation model should address opportunities to increase participation in the Pilot by renters, and whether landlord co-investment is reasonable, given the rent restrictions and co-pays for the multifamily whole building programs.

Quality:

- The proposed model should ensure positive-savings for each household treated, and how the potential for negative-savings will be avoided.
- The proposed implementation plan should include efforts to track implementation activities in such a way as to enable data collection and analysis of long-term benefits of the treatments to the household.

Customer-centric:

- The successful bid will present innovative and cost-effective approaches to deliver a seamless, low-income, deep energy saving program for the recipient with as many services provided in as few visits as possible and improve on current ESA Program delivery.
- The proposed program design should address how all feasible, direct-install measures will be installed in as few visits as possible and discourage multiple treatments by different installers scoped to install different measure packages (i.e., the main ESA program measures, and the Pilot Plus or Pilot Deep measure packages).
- The successful bid will describe how the program will be delivered to participating households in a manner that minimizes disruption and adds to an expedient treatment timeline.
- The proposed program design should address how the Pilot's measure packages will be tailored to customer needs, based on customer data collected by SDG&E's (see Customer Targeting section).
- The proposed implementation plan should address how specifications and warranties will be administered, including ESA warranty requirements as documented in the ESA Program California Installation Standards Manual (as provided in Appendix F).²

Optimization

- The successful bid will present innovative and cost-effective approaches to achieve program objectives while minimizing program administration, duplicative costs, and burdens to ratepayers.
- SDG&E will evaluate proposals based in part on the total funding requested

² Energy Savings Assistance Program, California Installation Standards Manual (April 2021) at Appendix F, (warranty requirements are explicitly required for ESA measures).

to go towards program measures that save energy and/or reduce ratepayer collection, as a proportion of overall proposed costs.

Pilot Market Segment:

The Pilot market segment at a minimum will be comprised of low-income qualified customers. Eligible ESA program customers are defined as customers with annual household incomes at or below 250% of Federal Poverty Levels.³ However, additional customer targeting strategies should take into consideration specific customers who may be in multiple “needs state” as outlined in the table below and identified in Attachment 3, Section 3 of the Decision.

Demographic	Financial	Location	Health Condition
Housing Type	CARE	DAC	Medical Baseline
Rent vs. Own	Disconnected	Rural	Respiratory
Previous vs. New Participants	Arrearages	Tribal	Disabled
Seniors	High Usage	PSPS Zone	
Veterans	High Energy Burden	Wildfire Zone	
Hard-to-reach	SEVI	Climate Zone	
Vulnerable	Affordability Ratio	CARB Communities	

The ESA Pilot Plus/Pilot Deep solicitation seeks at the minimum the following from its third-party providers:

- Incorporate all Pilot guidelines within their proposed implementation plans;
- Describe Pilot methodologies and strategies to reach energy savings goals, including proposed measure packages;
- Determine the level of investment required for each home to reach the energy savings goals and;
- Incorporate best practices from previous pilots as applicable.

The single-stage RFP will include instructions with a sample version of the contract documents to be negotiated and executed by successful participants in the solicitation process. SDG&E’s typical contract contains Standard Contract Terms and Conditions⁴ and General Terms and Conditions, both of which consist of regulatory and commercial terms that are required for the ESA Pilot Plus/Pilot Deep program. Other information may be included depending on the program requirements.

³ See Senate Bill 756, Stats. 2021-2022, Ch. 248 (Cal. 2021), "On and after July 1, 2022, the bill would define ‘low- income customers’ for those purposes as persons and families whose household income is at or below 250% of the federal poverty level.”

⁴ D.21-06-015 at 498, OP110

Purpose and Objectives

The purpose of this RFP is to evaluate proposals for program design and implementation services for the ESA Pilot Plus/Pilot Deep program. Key elements to consider when bidding on this RFP:

- Program Opportunity (vision, design/delivery, intervention strategies, available measures, portfolio energy savings goals, customer-centric, optimization, quality, treatment levels)
- Program Overview
- Program Compliance
- Statement of Work
- Program Evaluation Measurement and Verification (EM&V) Standards / Guidance
- Terms and Conditions
- Technical Requirements
- Diversity, Equity, and Inclusion
- Savings Potential
- Safety
- Adherence to Requirements

If the proposal is successful, the bidder will be invited to answer specific questions and provide a presentation during interviews. This presentation would need to include additional information to further validate the bidder's proposal.

PowerAdvocate Registration

SDG&E will manage this event through Power Advocate's sourcing platform. Interested bidders will need to register in Power Advocate to access all future communications and, upon its release, the RFP for the ESA Pilot Plus/Pilot Deep program.

All Bidders are **required to register in Power Advocate to access the RFP documents**, submit questions, and submit an ESA Pilot Plus/Pilot Deep proposal. Bidders can register in Power Advocate using the following URL: (<https://www.poweradvocate.com>).

Apply to the ESA Pilot Plus/Pilot Deep event through the Power Advocate "Opportunities" portal, search for the SDG&E event, and then click the key to request access to the event. The Follow steps should be followed for applying to the ESA Pilot Plus/Pilot Deep event.

- *Are you registering for a specific event? * Click the 'Yes' button Who referred you to this event? * PEPMA Announcement*
- *Name of that individual's company: * San Diego Gas & Electric Company*
- *Name or description of the Event: PA event #128943 SDGE Pilot Plus Pilot Deep Request for Proposal*
- *Click "Continue"*

PowerAdvocate Support

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(857)453-5800 M-F 8:00 AM to 8:00 PM Eastern Time