Decision 18-01-004 January 11, 2018

BEFORE THE PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA

Application of Southern California Edison Company (U338E) for Approval of Energy Efficiency Rolling Portfolio Business Plan.	Application 17-01-013
And Related Matters.	Application 17-01-014 Application 17-01-015 Application 17-01-016 Application 17-01-017

(See Appendix A for Appearances)

DECISION ADDRESSING THIRD PARTY SOLICITATION PROCESS FOR ENERGY EFFICIENCY PROGRAMS

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Appendix A – List of Appearances

DECISION ADDRESSING THIRD PARTY SOLICITATION PROCESS FOR ENERGY EFFICIENCY PROGRAMS

Summary

This decision addresses the required process for third party solicitations in the context of the rolling portfolio energy efficiency programs overseen by the investor-owned utility (IOU) program administrators (PAs). Addressing this third party solicitation process prior to considering the overall energy efficiency portfolio proposals by all PAs will allow the IOUs to undertake certain preliminary activities while we render a decision on the complete applications at issue in this proceeding. Solicitations will begin after the business plans are addressed by the Commission.

This decision approves a two-stage solicitation approach to soliciting third party program design and implementation services as part of the energy efficiency portfolio. All IOUs will be required to conduct a Request for Abstract (RFA) solicitation, followed by a full Request for Proposal (RFP) stage.

This decision also approves the general sequencing of solicitations over the next several years as the IOUs move toward a greater share of their energy efficiency portfolios designed and implemented by third party providers.

We require the IOUs to utilize procurement review groups (PRGs) for design and conduct of solicitations, as well as add an independent evaluator (IE) structure analogous to the structure utilized by supply-side solicitations, except that the IEs shall be specifically hired for their energy efficiency expertise. The IEs will provide support to the PRGs and periodic updates to the Commission, as well as individual feedback on contract awards that are for longer than three years and/or for $5 million or more. Such contracts will be required to be submitted for Commission approval via a Tier 2 advice letter. Final contract

awards for other smaller and/or shorter contracts will be the responsibility of the IOUs.

The Commission also requires a set of standard and modifiable contract terms and conditions, for a subset of terms, to be developed and reviewed prior to the conduct of any solicitations. Specific requirements are included for further definition of disadvantaged workers and workforce and quality installation standards to be applied to third party contracts. This decision specifies several next steps on development and approval of the third-party contracts.

The Commission also reserves the right to modify this process, including choosing to hire an IE itself, as this process progresses and as any further issues are identified through monitoring and oversight.

This proceeding remains open for consideration of the standard contract terms and conditions, as well as the full business plan proposals submitted by all PAs.

1. Background

In October 2015, the Commission adopted Decision (D.) 15-10-028, which established a "Rolling Portfolio" process for regularly reviewing and revising energy efficiency program administrators' portfolios. D.15-10-028 provided guidance to energy efficiency program administrators (PAs) regarding: the general schedule and required contents of business plans, implementation plans, annual budget advice letter filings; the collaborative process for developing business and implementation plans through a stakeholder-led coordinating committee; and other details regarding the structure of this new process.

In August 2016, the Commission adopted D.16-08-019, providing further guidance on rolling portfolio elements including regional energy network

program proposals; baseline and meter-based measurement of energy savings; and changes to statewide and third party programs and their administration.

D.16-08-019 directed the investor-owned utility (IOU) energy efficiency PAs, Marin Clean Energy (MCE), and existing or new regional energy networks (RENs) to file business plan proposals for the 2018-2025 period by January 15, 2017. Southern California Edison Company (SCE), San Diego Gas & Electric Company (SDG&E), Pacific Gas and Electric Company (PG&E), Southern California Gas Company (SoCalGas), and MCE all filed timely business plan applications; and the San Francisco Bay Area REN (BayREN), Southern California REN (SoCalREN), and Tri-County REN filed timely motions for approval of their REN business plan proposals.[1]

On January 30, 2017, a Chief Administrative Law Judge's (ALJ) ruling consolidated all eight business plan applications and motions and set deadlines for parties to file protests or responses to the applications or motions, and for applicants and REN proponents to file replies to any protests or responses.

On February 10, 2017, SCE filed an amended business plan application. On February 14, 2017 the California State Labor Management Cooperation Committee filed a motion for extension of time to protest or respond to all business plan filings. Assigned ALJ Fitch's February 15, 2017 e-mail ruling partially granted the motion, revising the response or protest deadline to March 3, 2017 and the deadline to reply to responses or protests to March 10, 2017.

[1] All five applications and three motions were timely filed pursuant to Rule 1.15.

On March 3, 2017, protests were filed by: the City and County of San Francisco (CCSF); Coalition for Energy Efficiency (CEE); County of Los Angeles on behalf of Local Government Sustainable Energy Coalition (LGSEC); Office of Ratepayer Advocates (ORA); Rural Hard to Reach Local Government Partnerships' Working Group; The Utility Reform Network (TURN); MCE; PG&E and SoCalGas.[2] Also on March 3, 2017, responses to the applications were filed by California Energy Efficiency Industry Council (Council);[3] California Housing Partnership Corporation (CHPC) and Association for Energy Affordability; CodeCycle LLC; Energy Producers and Users Coalition (EPUC); City of Lancaster; National Association of Energy Service Companies (NAESCO); Natural Resources Defense Council (NRDC); Center for Sustainable Energy (CSE); BayREN; PG&E; SCE; SDG&E; and SoCalGas.[4] On March 10, 2017, all applicants and REN proponents filed replies to responses and protests of their applications and motions.

On March 16, 2017, the Commission held a prehearing conference (PHC) in this consolidated proceeding wherein parties discussed a draft scope and schedule which the ALJs had distributed to the service list ahead of the PHC. On April 14, 2017, the Scoping Memo was issued setting forth the scope and

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[2] CCSF and MCE filed protests of PG&E's application; PG&E and SoCalGas filed protests of MCE's application; all other protests were not specific to one application or motion.

[3] The California Energy Efficiency industry Council has since changed its name to the California Efficiency + Demand Management Council (Council).

[4] City of Lancaster filed a response to SCE's application; PG&E filed a response to each REN motion; SCE filed responses to the Counties of Los Angeles and Ventura, and specifically to the LGSEC Local Government Partnerships Statewide administration proposal; SDG&E filed a response to SoCalREN; and SoCalGas filed responses to Tri-County REN and SoCalREN and the LGSEC Local Government Partnerships Statewide administration proposal. All other responses were not specific to a single application or motion.

schedule for the proceeding and seeking supplemental information from the PAs and prospective PAs.

On June 9, 2017, the ALJs issued a ruling modifying the remaining procedural schedule.

On June 16, 2017, Commission staff held a workshop on third party solicitation issues.

On August 4, 2017, proposals for the third party solicitation process were filed by the following seven parties: CEE; County of Los Angeles on behalf of SoCalREN; ORA; PG&E; SCE; SDG&E; and SoCalGas.

On August 18, 2017, the following parties filed comments on the third party solicitation process: CEE; County of Los Angeles on behalf of SoCalREN; Council; GreenFan, Inc. (GreenFan); MCE and BayREN, jointly; NAESCO; NRDC; ORA; PG&E; Small Business Utility Advocates (SBUA); SCE; SoCalGas; and Verified, Inc. (Verified).

On September 1, 2017, the following parties filed reply comments on the third party solicitation process: CEE; County of Los Angeles on behalf of SoCalREN; Council; GreenFan; NAESCO; NRDC; ORA; PG&E; SBUA; SCE; SDG&E; SoCalGas; and Verified.

2. Solicitation Process Proposals

Proposals for the conduct of third party solicitations were filed by all four IOUs, plus SoCalREN, CEE, and ORA. The IOU proposals are described first below, followed by the proposals of the other parties.

2.1. IOU Proposals

Each of the IOUs submitted a solicitation proposal that details its approach to third party solicitations, including sectoral designations, budget ranges, savings goals, solicitation processes, evaluation factors, and schedules.

All of the IOUs except SDG&E[5] proposed to utilize a two-stage solicitation process. Stage 1 would be a request for abstract (RFA) process, to gather high level information on prospective programs and contractors. In the RFA stage, participants would provide a short abstract summarizing their proposed program, approach, qualifications and experience, and indicative pricing. IOUs would then select potentially qualified respondents following scoring and evaluation of the abstracts. In their selection processes, some IOUs also propose that they will assess viability and usefulness of the programs proposed in the RFAs.

If there was a robust response, the IOUs would then issue a request for proposal (RFP) soliciting detailed offers from qualified participants. RFP responses would then be evaluated with qualitative and quantitative criteria, and would also utilize in-person interviews. The most competitive participants would then be notified that they are short-listed and would proceed to the contract negotiation phase.

The IOUs also indicate the need to utilize other processes such as requests for information (RFIs), as necessary. In addition, in some cases, such as time-sensitive situations, the two-stage process might be bypassed in favor of only an RFP process.

The IOUs state their intent to collaborate on a standard form requiring participant information, such as company name, size, revenue, location, etc. The IOUs state that this standardization should help participants respond to multiple solicitations, especially if they are issued concurrently by multiple IOUs.

[5] SDG&E's proposal, at 11, discusses both a one-stage and a two-stage process, but indicates a preference for utilizing the one-stage process with two steps.

The IOUs also propose to utilize a "pro-forma" contract version that can be further negotiated and amended by a successful participant in the solicitation process. The standard pro-forma contract would include general terms and conditions, consisting of commercial and regulatory terms that are required regardless of the product or services being procured.

The IOUs also propose a rolling solicitation timeline that would rotate through the various sectors, with a manageable number of solicitations (approximately 3-5) occurring every six months. The timeline is designed to ensure that all IOUs reach at least 60 percent of their portfolios being designed and implemented by third parties by the end of 2020. This would result in a completely refreshed portfolio in place by 2021.

Each IOU included in its solicitation proposal a schedule for the solicitations over the next three years or so. SCE also included a generic timeline for each of nine steps in the solicitation process, as follows:

- Step 1: RFA preparation and release (1-3 months)
- Step 2: RFA responses (1 month)
- Step 3: RFA evaluation and selection (2-3 months)
- Step 4: Solicitation preparation (3-4 months)
- Step 5: Solicitation release (1 month)
- Step 6: Solicitation response and evaluation (2-3 months)
- Step 7: Contract recommendation (1 month)
- Step 8: Contract negotiation (1-4 months)
- Step 9: Program mobilization (3-6 months)

SoCalGas and SDG&E presented timelines with similar steps, compressed into fewer total steps, with slightly different lengths of time devoted to each. The overall approach and elapsed time is similar, however.

The IOUs also described how the process would work if a program delivery was being transitioned from an IOU implementer to a third party, or from one third party implementer to another.

To ensure a robust response to the solicitations, the IOUs propose to notify potential participants via individual IOU websites, the California Energy Efficiency Coordinating Committee (CAEECC) website, and the rulemaking and business plan service lists. In addition, they plan to conduct vendor outreach and training, and conduct bidder's conferences for each solicitation.

The IOUs propose to transition from the use of a peer review group, currently in place for all utilities, to a procurement review group (PRG) that is modeled on the supply-side PRG process utilized by all of the IOUs. While the structure and purpose of the groups is similar, the IOUs state a commitment to ensure broader participation in solicitation review from parties with meaningful expertise who are nonetheless not financially interested in the outcome of the solicitations (guarding against any financial conflicts of interest).

The IOUs cite concerns discussed in the CAEECC process that members of the CAEECC who are market participants not be able to participate in an oversight role for solicitations because they may also be third party implementers who should not have access to the pricing, performance, and marketing strategies of their competitors, giving them access to unfair advantage and superior market knowledge.

Given these concerns, stakeholders also proposed utilizing independent evaluators (IEs), for contracts valued at $5 million or more, to monitor the third party solicitations in a manner that supports the continued role of the PRGs and the solicitation process in general.

The IOUs propose that each utility continue to have its own PRG, whose role would include, but not be limited to:

- Reviewing each IOU's sector- or segment-specific solicitation plans
- Providing timely input into the draft RFP language and evaluation criteria
- Reviewing IE presentations and reports
- Providing recommendations to each PA based on its review
- Reviewing and commenting on IE advisory reports, as applicable.

The IOUs also propose that each PRG include Commission staff representing both Energy Division and ORA, other state agencies as appropriate (such as the California Energy Commission (CEC)), public interest advocates such as TURN and NRDC, and organizations involved in the energy industry whose members do not have a financial interest in the outcome of each solicitation, such as California Utility Employees.

The IOUs also suggest that because the PRG will have access to the financial and operating information of individual energy efficiency businesses when reviewing the offers received, representatives of any firm or organization whose members may compete in a solicitation should not serve on the PRG.

Finally, each PRG would function in an advisory capacity to each IOU and not to the Commission.

In addition, the IOUs propose to work with IEs on an ongoing basis for any solicitation worth $5 million or more, having the IEs create and deliver reports to the PRG to inform its discussions and provide potential advice to the IOUs. The IE would advise the lead IOU and assess the conformance of the solicitation with Commission direction, solicitation plans, the approved business

plans, and other applicable policy. The IE would rely on a standard checklist and would attend relevant IOU meetings. Specific tasks and responsibilities of the IE may include, but not be limited to:

- Assessing conformance with Commission and RFP requirements (as prescribed in each PA's solicitation protocol)
- Assessing whether contract negotiations are being conducted fairly
- Mediating disputes that may arise during contract negotiations
- Offering process improvement suggestions throughout the solicitation process
- Generating advisory reports, which will be available to the PA and its PRG.

The IOUs propose that in order to implement the IE concept in a timely manner, they would rely on their existing pool of IEs, which have been confirmed by Commission staff according to the IOUs' bundled procurement plans for supply procurement. PG&E states that it would support soliciting additional energy efficiency expertise for IEs, but cautions that expertise and cost should also be factors.

PG&E also proposes that, going forward, each IOU conduct a competitive solicitation to select one or more IEs qualified to monitor their energy efficiency third party solicitations. Candidates would have expertise in evaluation, energy efficiency, demand response, but not necessarily expertise in energy procurement, construction practices, or power purchase agreements.

PG&E proposes that the IOUs' selection of IEs be confirmed by Energy Division management and approved IEs would be placed in a pool of qualified IEs.

The IOUs propose that they present selected offers to the PRG for feedback and guidance. When an IE is employed, the IE would also present its report and recommendation to the PRG, which PRG members could then use to inform evaluation and guidance to the IOU. After meeting with the PRG, the IOUs would proceed to the contract signing phase of the process, followed by program implementation. Commission approval for signed contracts would not be required after the PRG has reviewed the process.

The IOUs also included a set of bidder evaluation criteria or scoring criteria, including such considerations as responsiveness to the RFA/RFP requirements, cost, feasibility/likelihood of success, innovation, capabilities and experience, and diversity.

The IOUs also suggest that third parties should propose embedded evaluation, measurement, and verification (EM&V) approaches in their program proposals, where applicable.

2.2. Other Party Proposals

The County of Los Angeles, on behalf of SoCalREN, submitted a proposal that describes the contracting process required by the County for soliciting commodities and services, which SoCalREN would utilize when hiring third parties as part of its energy efficiency program administration. The process includes required elements, as well as a process for protests, an RFP template, and a bidder training approach.

CEE submitted a proposed process that would apply to the IOU PAs. In its proposal, CEE included a list of items which each bid proposal would be required to include, such as:

- How the proposal meets legislative and CPUC policies and goals
- A large number of requirements related to workforce training and quality installation, including participation of minority and disadvantaged communities, requiring quality control, and compliance with permit and code requirements
- If workforce standards are not included, justification for why they are not included
- Inclusion of meter-based measurement and verification (M&V), or if not, justification for why it is not included.

CEE also supports utilizing PRGs and IEs as essential elements of the portfolio structure. CEE supports the Commission hiring the IEs directly for a period of at least three years, as distinct from the IOU recommendation for their direct hiring of the IEs. CEE includes a list of functions that the IE should perform, in conjunction with the PRGs.

CEE is also concerned about guarding against potential conflicts of interest by IEs, and references the Commission's rules and discussion in D.05-01-055, about independence of EM&V consultants as a model for a similar set of rules for IEs.

Finally, CEE recommends that all third party contracts be submitted to the Commission for approval via advice letters.

ORA submitted the most comprehensive non-IOU proposal for the third party solicitation process. ORA proposes that the IOUs submit for Commission approval solicitation plans that provide a roadmap detailing:

- Overarching procurement strategies and individual solicitation objectives;
- Need determinations and a description of how need was determined;
- Solicitation budgets and procurement targets;

- General criteria that will be used to evaluate potential bids;
- Expected schedules for upcoming solicitations; and
- Metrics and indicators that can be used to determine whether the solicitation plans are accomplishing their objectives.

ORA proposes that the PAs should submit solicitation plans as part of their business plan applications for Commission approval, as has occurred here. Further, ORA indicates that if the Commission finds any solicitation plans deficient they should be required to be revised and submitted via a compliance filing following a final decision in the proceeding.

ORA also points to the Commission's presumption, in D.16-08-019, that program design and delivery tasks should be conducted by third parties, unless the utilities specifically make a case for why utility personnel must conduct the program activity. ORA points out that the IOUs fail to address this concern in their current business plans.

To address this, ORA proposes two potential pathways that the IOUs can use to establish that they have met this required showing, either by demonstrating competitive bidding or submitting utility program personnel justification narratives. In the first example, ORA suggests that the IOUs be required to submit a responsive bid in a competitive solicitation along with third parties; that competitive bid would be evaluated by stakeholders and the Commission. Alternatively, if the IOU submitted a narrative justifying the use of utility personnel, it would be required to describe:

- The specific program activities the IOU proposes to use utility personnel to perform;
- Why the IOU proposes to use utility personnel for those specific program activities;

- The estimated annual cost for the program activities that will be performed by utility personnel, with clear per-unit costs, similar to what the IOU would require from a third party vendor contract;
- Whether the program activities are available in the market and the estimated cost for comparable services from non-utility vendors;
- How the utility will ensure that the use of utility personnel does not unreasonably constrain the program design and delivery of third party programs; and
- How ratepayers and customers will benefit from the use of utility personnel for program delivery instead of non-utility third parties.

ORA suggests that after the initial approval of the business plans, the utilities could submit revised narratives annually along with the budget advice letters in September of every year. ORA also suggests that wherever possible, the amounts charged to the IOU balancing accounts for these activities should be on a pay-for-performance basis.

On the issue of solicitation oversight, ORA proposes the use of both the PRGs and the IEs, similar to the structure the Commission utilizes for generation solicitations. In addition, ORA proposes that all third party contracts be submitted for Commission approval. ORA suggests that all contracts resulting from a specific Request for Offer could be submitted together in a Tier 2 advice letter, which ORA argues is common practice for many types of contract approvals, including some on the demand-side such as the demand response auction mechanism results.

2.3. Comments of parties on solicitation proposals

SCE filed comments primarily in response to the proposals of ORA and CEE, making the following general points:

- Energy efficiency PAs should not have to identify the programs and program activities they will implement until after the PAs conduct third party solicitations
- SCE's existing PRG for power procurement contracts is sufficient for reviewing energy efficiency contracts
- The IEs should be under contract to each PA and not to the Commission
- The PAs should be required to list their third party contracts in their annual budget advice letters, rather than seek approval via separate advice letters
- Contract terms should be left to contract negotiations and not pre-determined in a decision on the business plans.

PG&E's comments object to the idea of requiring advice letter approval of all third party contracts, suggest utilizing the existing IE pool and augmenting if needed, and object to the notion that an IE under contract to the PAs would be biased toward that PA.

SoCalGas' comments request that the Commission approve their proposed PRG structure, reiterate their view that IEs will impede the third party solicitation process, and object to an advice letter filing requirement for contract approval. SoCalGas also argues that the third party requirements should apply to all PAs, not just IOU PAs.

CEE filed comments that support two of ORA's proposals, to 1) run solicitations for new IEs with demand-side energy efficiency experience and 2) require contract submission to and approval by the Commission for third party

contracts. CEE opposes setting a $5 million threshold for IE review, as proposed by some of the IOUs.

CEE also submitted detailed comments on a number of the scoring criteria proposed by SDG&E and SoCalGas, supporting most of them, with some changes to reflect emphasis on safe and proper installation, Commission policies, and augmenting the diversity criteria. CEE also suggests that the Commission require PG&E and SCE to adopt the same scoring criteria, as modified by CEE's suggestions.

Finally, CEE also suggests that several of the workforce, education, and training proposals be statewide rather than local.

County of Los Angeles, on behalf of SoCalREN, responds to the solicitations proposals with the following two major points:

- The Commission should not be prescriptive in dictating required coordination among PAs; rather, such coordination should be fluid.
- An IE and PRG process would be unnecessary and redundant to require of RENs.

ORA, in its comments, focuses on the following recommendations:

- The IOUs have failed to provide sufficient justification for program activities proposed to be implemented with utility personnel and the Commission should require those activities to be bid out in competitive solicitations.
- An IE should be assigned to evaluate all utility energy efficiency solicitations unless Commission staff, in consultation with the PRG, determines that the costs of an IE outweigh the benefits.
- SoCalGas' proposal to utilize a PRG without an IE should be rejected.
- The Commission should ensure meaningful oversight of ratepayer funds for all competitive solicitations for program activities of all PAs.

The Council submitted comments on the solicitation proposals, with the following key points about the process:

- PRG and IE processes should render Commission approval of individual contracts unnecessary.
- The proposed PRG and IE processes should be approved, with a focus on Commission policy and business plan conformance.
- The Commission should approve the process without delay and ahead of business plan approval, and allow for solicitations with existing IEs, if needed.
- The Commission should allow for reasonable extensions of existing third party contracts and maintain the deadline for 60 percent third party designed and delivered programs by 2020.

The Council is also concerned about several specific items in the PA proposals regarding communication of solicitation, bid status, level of detail, and inclusion of certain information in the solicitation process, as well as the timeline for certain sector solicitations. Finally, the Council would like the Commission to determine that strategic energy management (SEM) and potential energy efficiency and demand response limited integration programs are not part of the 60 percent requirement for third party programs.

NAESCO's comments make a number of overall points about the PAs' solicitation proposals. First, NAESCO feels that the IOU solicitation plans show a surprising lack of coordination at this stage of the proceeding, given the Commission's emphasis on statewide programs and uniform PA administrative approaches. In particular, NAESCO objects to the PG&E proposal to utilize a "platform" concept, which NAESCO believes may have merit, but hasn't been well coordinated with the other IOUs.

NAESCO also states that the IOUs still seem to be unclear about the Commission's definition of third party programs with respect to the purpose of

the programs in the energy efficiency portfolio, and the role of the third parties in the design and implementation of their programs. In particular, NAESCO points to the lack of consistency in budget allocations to the statewide program areas among the IOUs. In addition, consistent with the Commission's prior direction, NAESCO objects to the idea that utilities would retain any functions that could be bid out to third parties, and requests that the utilities not be allowed to do so without justifying the need.

NAESCO also argues that the IOU plans do not conform to the requirements of D.16-08-019, specifically with respect to the Commission's direction to propose to bid out 60 percent of the portfolio, or more unless the IOUs specifically justify why functions should be performed by utility personnel.

Finally, NAESCO believes the IOUs seem unclear on the proper role of the IE and PRGs. In particular, NAESCO objects to the use of IEs with supply-side expertise to evaluate energy efficiency programs. They also argue that the purpose of the PRGs should be to advise the Commission and not the PAs.

NRDC's comments focus on requesting that the Commission resolve the process for the third party solicitations prior to adopting the business plans, preferably in ruling. NRDC requests that the preliminary ruling resolve the following issues:

- Requirement to have a PRG and an IE, citing "widespread support."
- Expertise required to serve as an IE.
- Determination of who will hold the contract with the IEs. NRDC supports having the IOUs hold the contracts, with safeguards to ensure no bias. NRDC argues that having the Commission hold contracts is impractical given state contracting challenges.
- Membership guidance on the PRGs.

- Scope of review for Year 1 of the process, with more detailed comments on the scope of review for Year 2 and beyond.

NRDC argues that the following issues could be deferred:

- Whether contract approval by the Commission is required for all third party contracts.
- Approved budgets for the IEs.
- Intervenor compensation clarification.

NRDC also includes several other points related to the overall solicitation process, including:

- Non-IOU PAs should at least have to interface with the CAEECC to provide transparency for their contracting processes.
- The Commission should clearly identify the scope of the IE's responsibility.
- Only disputed contracts should require Commission approval via an advice letter process and the Commission should establish an alternative dispute resolution approach for disputed contracts.
- Workforce readiness issues should be addressed in 2018 instead of 2019.
- The Commission should identify clear requirements for workforce quality standards and disadvantaged communities requirements for IOU inclusion in RFPs.

SBUA submitted comments that focus primarily on better designing the solicitation processes to serve small businesses and allow small energy efficiency contractors to participate. Specifically, SBUA recommends:

- All PAs should issue RFPs seeking energy efficiency programs specifically targeting small and hard-to-reach commercial customers.
- Scoring criteria for all proposals should include a proposal's ability to reach small and hard-to-reach customers.

- Greater budget detail should be provided, and money set aside, for programs serving small commercial customers.
- PRGs and IE pools should include individuals with specific experience and knowledge pertaining to small businesses.
- Training and support programs should be designed to encourage the participation of small bidders.
- A 10 percent preference should be given to small energy efficiency contractors.

MCE and BayREN filed joint comments in response only to PG&E's solicitation proposal. Their comments primarily address improvements that should be made to adequately address program overlap between PA programs and modifications to maximize the value of responses to the RFAs. In particular, MCE and BayREN request that PG&E coordinate with local PAs during the formation of the scope of the solicitation and in bid selection; include an 18-month transition plan for programs moving from one administrator to another; and embed regulatory requirements related to overlapping programs in solicitation terms and vendor outreach and training.

In addition, MCE and BayREN recommend that the utilities be required, if utilizing an RFA process, to make information included in the RFA responses available to all PAs, not just the PA soliciting the bids, to help identify opportunities and potential partners for each PA.

GreenFan and Verified submitted nearly identical comments in response to the third party solicitation proposals, making the following recommendations:

- The IOUs should not be involved in third party solicitation RFP and scoring processes; instead, those should be conducted by the IE.
- The entire portfolio should be competitively bid to third parties using the IE.

- The entire emerging technologies program annual budget should be available for competitive bidding for pilot programs of innovative emerging technologies and included in the third party solicitation process where scoring is performed by the IE.
- No utilities or third parties should receive ratepayer funding for workpaper development. Instead, anyone preparing workpapers should be able to submit them for review by the Commission's ex ante review team.
- The Commission should initiate a Request for Quotation (RFQ) process for subject matter experts to provide review of workpapers funded by non-refundable fees paid by parties who submit workpapers.
- Proprietary third party workpapers are essential to putting the energy efficiency portfolio of the Commission on a path to contribute to the goal of doubling the amount of energy efficiency in buildings by 2030.

2.4. Reply Comments

All of the IOUs submitted reply comments that essentially reiterate the desire for the Commission to approve their proposals without delay. SDG&E also specifically asks that the Commission approve interim contract extensions for existing third party programs, beyond the deadline set forth in D.15-10-028.

SoCalGas reiterates its request for the Commission to approve a threshold for an IE review to be required. They also specifically oppose the following requests by other parties:

- ORA's request for program narratives and program activity bidding by IOUs.
- CEE's workforce-related solicitation recommendations.
- MCE's request to make RFA results available to all PAs.
- GreenFan and Verified's requests to have IEs make bidding scoring and selections.

PG&E's comments address the following points:

- Customer-facing utility personnel should be maintained to support third party program success.
- PG&E should retain programmatic functions that coincide with its role as portfolio administrator.
- The existing IE pool is sufficient to begin the solicitation process, and the IE role should not be expanded to include program design evaluation.
- A threshold of $5 million is reasonable to initiate IE review, and could conserve ratepayer funds while expediting smaller scale proposals.
- PG&E's residential pay-for-performance, residential retail products platform pilot, and industrial SEM programs meet the new third party definition and should count towards the 60 percent third party threshold.
- PG&E is willing to advance the statewide career and workforce readiness solicitation, consistent with NRDC's recommendation.
- IOUs should be permitted to issue their solicitation prior to those of CCAs and RENs, and should not be required to make RFA responses available to all PAs.

SCE's comments make a number of arguments responsive to other parties' comments. First, SCE states that requiring IOUs to describe programs they would retain and staff with utility personnel would prejudge the outcome of the third party solicitations. SCE maintains that gaps should be identified after the third party solicitations and then filled, as needed.

SCE also argues against Commission approval of all third party contracts, making RFA responses available to all PAs, and SBUA's recommendations for "special treatment" for small commercial customers. SCE also argues that any workpaper process modifications should be addressed in the energy efficiency rulemaking (Rulemaking (R.) 13-11-005) and not this proceeding.

SCE also specifically states its disagreement with the following comments of other parties:

- NAESCO and ORA asserting that SCE's proposal is out of compliance with D.16-08-019.
- NAESCO's comment that "innovation" is not a criterion in SCE's proposed scoring criteria.
- GreenFan and Verified comments asserting that the IOUs did not justify splitting the emerging technologies program into two separate statewide programs.
- GreenFan and Verified comments stating that the IOUs have not delivered cost-effective statewide programs.

CEE submitted reply comments taking issue with the following comments of other parties:

- SoCalGas proposal not to utilize an IE, claiming redundancy with the PRG process.
- PG&E and SCE comments claiming that existing supply side IEs are qualified to review energy efficiency program bid solicitations.
- Various proposals to apply a dollar threshold to contracts requiring IE review, arguing that whatever threshold is set could be used to avoid scrutiny.

In addition, CEE reiterates support for Commission approval of the contracts, which does not substitute for PRG and IE review, since they are only advisory. CEE also reiterates criteria the Commission should set for contract renewal and modification, as well as scope of review for bid proposals, and workforce-related standards.

County of Los Angeles on behalf of SoCalREN provided reply comments that reiterate many of their points in opening comments. SoCalREN also disagrees with the IOUs' request that IOU solicitations be given priority over

other PA solicitations, particularly local ones. SoCalREN also supports NRDC's recommendation to utilize the CAEECC and its website as a solicitation communication tool.

ORA filed reply comments addressing a large number of points in other parties' comments and recommending the following key outcomes:

- ORA's proposal for Commission review of all third party contracts via a Tier 2 advice letter is reasonable and should be adopted.
- The Commission should require the IOUs to make an affirmative showing to justify continuing to conduct programs with utility personnel.
- The Commission should order SoCalGas to adopt a PRG and IE modeled after electric supply-side procurement.
- The Commission should require IEs to have energy efficiency experience.
- The Commission should not approve blanket use of IOU account representatives to market third party programs.
- The Commission should require that workpaper development functions be put out to bid as part of solicitations for statewide and/or third party programs.

The Council's reply comments include the following summary recommendations:

- Commission approval of individual third party contracts is still not justified and is unnecessary.
- Early Commission guidance on procuring IEs is needed to prevent delays in the business plan solicitations once the business plans are approved.
- Third parties should be allowed to set rebates and rebate structures.
- Existing approaches should be used to promote supplier diversity and small business preference.

- MCE/BayREN's proposal for an 18-month transition period would break contract agreements and should be rejected.
- RFA results should not be shared among PAs, except in response to a statewide program solicitation.

NAESCO's reply comments focus on the following points:

- The Commission should start the new third party solicitation process immediately.
- Evaluation of bids requires qualified IEs.
- The Commission should approve the CEE proposal for selecting and managing energy efficiency IEs.

NRDC's reply comments make three points:

- All RFPs should require bidders to describe their approach to ensuring quality work and how they plan to reach disadvantaged communities and/or small businesses.
- There should be consistency whenever possible in the RFP process (as requested by the Council).
- All PAs should coordinate throughout the solicitation process (as requested by MCE and BayREN).

SBUA's reply comments include a focus on the formation of new PRGs including consumer advocates, as well as disagreement with the idea that IOU solicitations should be prioritized, instead agreeing with MCE and BayREN that coordination among local and IOU PAs is essential.

SBUA also focuses on some of the functions that IOUs propose to retain, agreeing with NAESCO that as much as possible, including outreach, should be outsourced to third parties. In addition, SBUA agrees with ORA, GreenFan, and Verified that workpapers should be developed by third parties. Finally, SBUA agrees with the Council that the SCE residential/small-to-medium business pay-for-performance program should be included in the solicitations associated with its business plan.

GreenFan and Verified again submitted nearly identical reply comments, making the following key recommendations:

- Most current IEs do not have energy efficiency expertise.
- IEs hired by IOU PAs will not be independent.
- The Commission should reject SCE's assertion that it cannot justify program retention by utility personnel until after its third party solicitations are completed.
- The Commission should review all third party contracts by advice letter.
- SoCalGas should be required to create a PRG.
- IOU solicitations should not be given priority over other PAs.
- 100 percent of the energy efficiency budget should be included in the third party solicitations.
- CEE's suggested requirements for inclusion of workforce issues should be adopted.
- There should be no dollar threshold for requiring IE review of third party contracts.

GreenFan and Verified also submitted additional detailed comments about the appropriate workpaper process.

3. Discussion

This section discusses the Commission's conclusions regarding the third party solicitation process and requirements set forth most recently in D.16-08-019, as well as numerous prior decision requirements including D.05-01-055.

3.1. Overall Considerations and Direction

D.16-08-019 contained a requirement that each utility program administrator propose in its business plan to outsource at least 60 percent of its portfolio to third parties by the end of 2020. All of the utilities included this

proposal in their business plans, and further articulated the details of those plans in their August 4, 2017 filings on their solicitation plans.

The rationale for this requirement in D.16-08-019 reflects the Commission's view that the utility role should focus more on the design and management of the energy efficiency portfolio overall, and less on individual program design and implementation.[6]

Because of the scale of the investment in energy efficiency in California, especially over the past decade, there has been a great deal of capacity development in the private sector to deliver cost-effective savings to customers, and the Commission in D.16-08-019 chose to place greater emphasis on the utility role in tapping the market capabilities, rather than further relying on or developing in-house capabilities of their own, whenever possible.

Senate Bill (SB) 350 also put increased emphasis on reliance on pay-for-performance arrangements and meter-based energy savings evaluation. These elements are important in the context of increased reliance on third party program design and delivery.

For all of these reasons, D.16-08-019 emphasized that third party design and implementation should become the default for the majority of the portfolio, unless the utilities can justify, as pointed out by ORA, why use of utility personnel should continue. We recognize, however, it will take some time to effectuate this transition.

[6] *See* discussion in D.16-08-019 at 71-72.

All of the utilities have proposed a three-year transition period to get to a minimum of 60 percent third party designed and implemented programs by the end of 2020.

While this is the trajectory that the Commission requested in D.16-08-019, the scale and complexity of the market in California, as well as many of the detailed comments discussed above from thoughtful parties in this energy efficiency market space, lead us to conclude that a longer transition period is warranted to ensure success and sustainability with minimal disruption. We wish to maintain our emphasis on transitioning to a world in which at least 60 percent of the utility portfolios are outsourced to third parties. This percentage is a minimum or a floor, not a maximum percentage. Ideally, by the end of this first rolling portfolio period (through 2025), we would like to see the entire portfolio structured to support third party design and delivery as the default, except in cases where there is specific justification for utilities to handle certain responsibilities in-house. This is consistent with ORA's apparent vision of the portfolios, which we generally support. We differ, however, in terms of our level of confidence in our collective ability to get there successfully within three years.

To ensure a smooth transition and a sustainable structure, in part because our decision on these matters has been somewhat delayed, we find it appropriate to allow an additional two years for the transition to at least 60 percent third party portfolios. This additional time should allow the industry to mature further, factoring in the Commission's and the utilities' expectations and the market developing solutions to handle and mitigate any additional risk.

There has also been some ongoing confusion about the utilities' compliance obligation for third party minimum percentages currently, as well as

during the transition. To ensure no ambiguity about future obligations, and taking into account the current 20 percent minimum for the third party proportion of the portfolio, the table below lays out a compliance schedule between the approval of the business plans and the end of 2022.

Date	Third party percentage minimum
By December 31, 2018	25 percent
By December 31, 2020	40 percent
By December 31, 2022	60 percent

The December 31 dates in the first column of the table above indicate the date by which each utility is required to have under contract the percentage of the planned budget allocation for the portfolio for the following year. In other words, for the first example, by December 31, 2018, each utility should have at least 25 percent of its 2019 program year budget under contract to third parties for design and delivery of programs.

To compare this result to the original utility proposal, the schedule above will create a fully refreshed portfolio by 2023, instead of 2021. This should set up the portfolios well for reevaluation and continued evolution going into the next business plan cycle.

In comments on the proposed decision, PG&E expressed concern that the schedule may not allow for full compliance with the new D.16-08-019 definition of third party programs in 2018. To account for this transition period, we will allow third party programs created under the definition in place prior to D.16-08-019, as well as those in compliance with the D.16-08-019 definition, to count towards the requirements for 2018 only. Beginning in 2019, the D.16-08-019 definition of third party should be fully in effect.

3.2. Two-stage solicitation process

All of the utilities propose to utilize, to varying degrees, a two-stage process for soliciting third party program design and implementation proposals. SDG&E's proposal is a variation, with one stage and two steps. For the other utilities, the first stage would be the request for abstract, followed by a full request for proposal from third parties who are shortlisted after the RFA stage.

NAESCO and others request that the Commission make this two-stage process mandatory for all third party solicitations. We will stop short of doing that to avoid the risk of unintended consequences and delays. But we do believe that this two-stage structure should predominate and the one-stage RFP process should be utilized only in limited circumstances where the schedule must be compressed. This statement applies to all utilities, including SDG&E.

The two-stage process should be used unless there is a specific schedule-related reason that a shortcut must be used. We will monitor this situation and consider imposing stricter requirements in the future if it appears that the two-stage process is not working as intended and as proposed by the majority of utilities.

3.3. Commission Review

The utilities, in their solicitation plans, do not propose to submit individual contracts or groups of contracts to the Commission for review and approval, arguing that such a step is unnecessary if there is PRG and IE approval, as proposed. ORA, on the other hand, suggests that all third party contracts be submitted for review and approval by the Commission. Other parties suggest somewhere in between, such as setting a dollar threshold as the trigger for requiring Commission review and approval.

Unstated, but implied, in suggestions submitted by most parties, is the intent to mitigate some type of risk by requiring Commission review and approval of contracts. On the supply-side, which is the model for most parties' views of the way the energy efficiency third party solicitations should be structured, the Commission reviews only contracts that are for five years or longer or that vary from the approved procurement plan. This is similar to the dollar threshold for approval proposed by some parties here.

We see that there are risks associated with the third party solicitations, especially for an increasing portion of the portfolios. The two main potential risks we see are the following:

> Contracting bias. Because many utilities have existing third party relationships, likely including both positive and negative experiences from past interactions, there is a risk that utilities could exhibit some bias for or against certain contractors, including smaller contractors, in the RFA/RFP process. This could result in contract or program failure.
>
> Poor RFP design. Another possible risk is that the ultimate RFP design by the utilities intentionally or inadvertently thwarts the intentions of successful program design, delivery, and realized savings, for some or all sectors and subsectors of customers. Again, contract or program failure could be a result.

There are also risks associated with requiring Commission approval of all or a large portion of the third party contracts, individually or in batches. The main risk in this regard is delay, as the Commission may not have the time or ability to exercise judgment about such a large number of third party contracts in a way that ensures program and contract success.

It is also worth noting that part of the purpose of the Energy Savings Performance Incentive mechanism is to reward utilities for good portfolio performance and hold them accountable for energy efficiency program success,

without the need for the Commission to micro-manage all aspects of the program design, delivery, and contracting processes. Thus, the primary responsibility for the third party contracts shall continue to rest with the utilities.

However, because this process is expanding beyond previous levels, and to mitigate some of the risks identified and described above, we will require that any contract that has a value of $5 million or greater and/or a term of more than three years, be submitted to the Commission for approval via a Tier 2 advice letter. Contracts may be submitted in batches, at the discretion of the contracting utility.

Also as detailed further below, the Tier 2 advice letter must include a summary of the discussion/reaction from the PRG about the contract. In addition, each such contract submitted shall also be accompanied by a report from the IE, as discussed further in Section 3.5 below.

Since Energy Division staff will be represented on the PRGs, they will also be privy to those discussions and should know in advance if there is controversy associated with a particular solicitation. This should help with staff's ability to expedite the advice letter filings, at least on those results that are not controversial.

Commission staff should ensure the contracts filed by advice letter comply with the utility's approved business plan, all Commission decisions and direction, are not the result of a biased solicitation process, and do not thwart the intentions of successful program design, delivery, and realized savings, for some or all sectors and subsectors of customers.

Commission staff should also informally produce and maintain a template of information necessary to be filed to seek approval of the contracts for which Commission approval is required by this decision.

We also note that Commission staff always has the ability to review any contract informally at any time, including those that do not meet the dollar or length thresholds identified above for required submittal by advice letter.

In addition, we will require that the IOUs include in their annual energy efficiency reports a list of third party contracts, with identifiable (but non-confidential) details about each contract, including length, dollar value (aggregated, if necessary), market segment, sub-segment, size, or type of customer addressed, and any other identifying features.[7]

The list of third party contracts should also be maintained and updated on the proposal evaluation and proposal management application (PEPMA), the IOUs' joint third party energy efficiency solicitation web site, and available to the CAEECC to post, if desired, for additional transparency.

Finally, we note that D.15-10-028 required implementation plans that are developed by PAs and stakeholders. We acknowledge that implementation plans for third party programs will necessarily be developed and posted after solicitations have concluded. However, the timely and up-to-date posting of those implementation plans as soon as practical, but no later than 60 days after contract execution, is still required. For programs that will be bid out in later rounds of the solicitation schedule, posting of implementation plans is still required after the Commission's decision on the business plans, to reflect

[7] Details should include, but not be limited to: PA name, contractor name, contract start and end dates, details on any intermittency between the contract start and end dates, program start date (open for customer participation), program end date (date program will no longer be offered to the public or criteria used to decide whether to end the program), customers eligible for the program (gas or electric, market segment, other criteria), value of contract, and any other data required by Commission staff.

programs available to customers in the interim before additional third party solicitations are scheduled to take place.

3.4. Procurement Review Groups

All of the utilities propose to utilize PRGs, which would be structured as advisory groups to the utilities, with representation from Commission staff (including ORA), consumer representatives, and non-market participants who do not have a financial interest in the outcome of any solicitations.

Most parties generally support utilization of PRGs, though some parties would vest the PRGs with more authority and/or make them advisory to the Commission.

We agree there is value in continuing the PRGs, which have existed in some form for some time. The PRGs are a useful vehicle for following the solicitation processes and providing feedback to the PAs throughout. Continuing the PRGs balances the goals of oversight and transparency, as well as timely feedback, with the desire to have an expeditious solicitation process.

We recognize that PRG participation is voluntary and parties also have resource constraints. However, the PRGs also serve a two-way educational and transparency purpose and we encourage participation and utilization to the maximum extent possible. In response to comments on the proposed decision from SoCalGas, we clarify that participation in a PRG is eligible for compensation from the Commission's intervenor compensation program.

We will require that each utility have at least one PRG, and at its discretion, may utilize more than one PRG, if the IOU prefers to tailor the PRGs for specific market segments or other purposes. The PRGs shall consist of non-financially-interested parties, representing diverse stakeholder interests, as well as Commission staff, including ORA.

Similar to the supply-side PRG requirements, these PRG meetings must be noticed at least three business days in advance. Any materials to be discussed must be distributed at least 48 hours ahead of the meeting. The utilities must also distribute meeting notes within one week of the meeting conclusion or before the next scheduled meeting, whichever comes first. Call-in numbers must be provided to all participants. Finally, participation in the PRGs should be proposed informally by the IOUs to the Energy Division by letter to the director. IOUs shall make the director aware of any disputes about the composition of the PRGs; those will be resolved informally by the Energy Division director or brought to the Commission more formally, at the director's discretion.

In terms of the PRG's ultimate responsibilities, we expect the PRGs to be involved at all levels in the solicitation process, including:

- Draft RFA review
- Review of RFA bids and shortlist
- Draft RFP review
- Review of RFP bid selection criteria
- RFP shortlist and selected contractor review
- Review IE evaluations of all solicitations.

3.5. Use of Independent Evaluators

The IOUs propose to use IEs, similar to supply-side solicitations. The IOUs propose to hire and compensate the IEs, who will monitor and review utility solicitation actions. Most other parties support the use of IEs, though some advocate for the Commission to hire the IEs directly to guard against bias. Some parties also point out that the IEs already under contract to the utilities for supply-side solicitations may not have the appropriate expertise to evaluate energy efficiency program bids.

There was consensus during the developing of the IOU solicitation plans that an IE should exist, and nearly every party commenting on the proposed decision continued to reiterate the need for an IE function of some sort. Thus, we are revising our conclusions from the proposed decision and will institute the use of IEs by all of the IOUs in support of the energy efficiency third party solicitation process.

We will also require that the IEs utilized by the utilities for these energy efficiency third party solicitations to be hired specifically for this purpose and to possess energy efficiency expertise. Utilities shall not simply utilize their supply-side IEs for the energy efficiency solicitations. Thus, some time will be required to solicit and hire the appropriate IEs for this purpose. The utilities shall not begin their third party solicitations until they have IEs under contract with energy efficiency expertise. In addition, utilities should consult with Energy Division staff during the selection process and the Energy Division director should have final approval over the pool of IEs selected by each utility.

Utilizing the Commission's supply-side structure as a guide, in that context, the IEs monitor the entire solicitation process and provide a written report at the end that is delivered formally to the Commission as part of the contract evaluation and approval process. Given that we are not requiring that all third party contracts be submitted for formal approval by the commission, we will require a formal IE report to accompany only those contracts required to be submitted via a Tier 2 advice letter (i.e., those contracts valued at $5 million or more and/or with terms of longer than three years). In addition, IE reports on all solicitations shall be submitted to the members of the PRGs. In addition, the IEs should monitor the entire process from RFA design to contract execution, for all solicitations and contracts, not only those required to be submitted to the

Commission for approval. For the entire solicitation process, the IE will serve as a consultant to the PRGs, participating in PRG meetings, and shall also provide assessments of the overall third party solicitation process and progress, on at least a semi-annual basis, to the Commission via reports filed in the relevant energy efficiency rulemaking (currently R.13-11-005).

We note that the IOU proposals seem to indicate utilization of IEs in the energy efficiency third party contracting context slightly differently, where IE input and advice would be given to the PRGs only and not to the Commission. As far as we can tell, the use of IEs is designed to lend arms-length expertise evaluating the fairness of the conduct and results of the solicitation process by the IOUs.

We will also require that each utility hire a sufficient pool of IEs and have them on board prior to the launch of the first RFA. In this manner, the IEs can fulfill the function of monitoring the entire solicitation process.

In addition, as discussed further in Section 3.6 below, use of a standard set of contract terms and conditions, approved by the Commission, should mitigate additional risks as all stakeholders will be aware of the basic rules of engagement in the process from the outset.

The Commission may, as this process progresses, see a need for a stronger IE function. The Commission therefore reserves the right, at any point in the future, to hire an IE or multiple IEs itself, as part of our evaluation and oversight functions. We do agree that it would be preferable, in this context, for an IE function to be directly accountable to the Commission, though we can understand the desire to have the expertise available at the PRG level as well. In addition, Commission solicitation for IEs under contract to us would take additional time, and we do not wish to hold up the process beginning to allow

this occur. We will continuously reevaluate whether this additional step is necessary in the future.

3.6. Standard Contract Requirements and Process

Looking to our supply-side experience, as most parties have, for a model for this third party solicitation process, we note that another way to mitigate risk of program or contract failure is for there to be a set of standard contract terms and conditions that apply to all bidders and all contracts signed as part of the portfolio. Those terms and conditions are approved in advance by the Commission and represent terms that all parties agree are reasonable and commercially viable. Some terms and conditions could be standard and non-negotiable, and others may be negotiable within certain parameters, depending on the specifics of the activity being performed by the contractor.

In comments on the proposed decision, the Council recommended that only certain contract terms are reasonable to standardize. We agree and have revised the list below to account for the terms that should be standard, with others negotiable or modifiable within certain parameters. Both sets of terms should be proposed to the Commission formally in this proceeding as described in this decision.

Some of the terms that we expect to be standard, at least for similar program types, are the following:

- Eligibility (type of business, license requirements, insurance and bonding requirements, etc.)
- Safety requirements
- Dispute resolution process
- Termination process.

Those terms that are likely to be negotiable within certain parameters include the following:

- Workforce qualifications and quality installation requirements
- Progress and evaluation metrics
- Contract term/length
- Diverse and disadvantaged business and employee terms, including small business, if applicable
- Payment schedule and terms, both to third party and to participating utility customers (for incentive payments)
- Data collection and ownership requirements, including requirements for data collection, turnover of billing and energy use data, program tracking data, access to customer sites, and any other provision to ensure quality program evaluation, both during and after the program intervention
- M&V requirements, including guidelines about normalized metered energy consumption (NMEC) design requirements
- Coordination with other program administrators.

In comments on the proposed decision, CEE recommended that the Commission specify further the requirements for two of the items above: 1) workforce qualifications and quality installation requirements, and 2) diverse and disadvantaged business and employee terms, including small business, if applicable. We agree that these are important issues that require more specificity. However, they are also items that are more broadly applicable to the portfolio as a whole, in addition to the third party solicitations. Thus, we will also address them when we decide on the business plan applications generally.

In the meantime, with respect to the third party contracts, for the workforce qualifications issue, we will require that the utilities propose a set of requirements for the contract among the modifiable terms, with specific

recommendations for each market or sector, to identify the applicable workforce installer standards that would reduce the risk of lost energy savings from poor installation of energy efficiency measures, including any specific skills certification requirements and/or broader occupational training and experience requirements (such as journeymen and apprenticeship requirements).

For diverse and disadvantaged businesses and employees, we will require the utilities to propose a definition, as well as a goal, that we may include in the metrics for tracking of the business plan results generally, specifically for third party contractors. We will evaluate both of these proposals along with the contract terms and conditions, as described further below.

Commission staff is also developing guidelines in the areas of requirements for M&V and NMEC data collection. Staff plans to continue developing these guidelines in parallel and will maintain an up-to-date list of guidelines on the Commission's web site in the future.

To facilitate the standardization of the first set of contract terms and conditions listed above, we will require each utility to submit, jointly with the other utilities, a proposed standard third party contract to the Commission for approval. The standard contract should address at least all of the items listed above as expected to be standard, and may propose others that are non-modifiable and some that may be modified within certain parameters, such as those listed as negotiable above. One utility, selected by its peers shall submit, on behalf of the other utilities, the proposed third party contract, with the standard and the modifiable conditions proposed, as a motion for contract approval within this business plan application proceeding within 60 days after this decision is issued. We request, if logistically possible, for the CAEECC or the utilities jointly to host an informal workshop or meeting to discuss contents of

the proposed contract with interested parties to seek input prior to filing the motions in this proceeding. Similar to any other motion, parties will have a formal opportunity to respond to the utility motions on the record of this proceeding. The ALJ(s) will set additional steps, as necessary, after the motions and responses are filed.

3.7. Pay for Performance

One element of the energy efficiency portfolio emphasized in SB 350 where the Commission and the utilities are encouraged to do more is to pay for performance. In other words, the Legislature has encouraged us to tie payment for services more directly to energy savings delivered, as much as possible. This requirement is directly applicable to the third party solicitations.

We recognize that there is no one-size-fits-all approach to designing pay-for-performance programs that work. In the custom project area where this may be most applicable, the Commission and the utilities in the past have experimented with several approaches, including one that relies heavily on energy service companies, and another, standard performance contracting, where incentives are paid directly per kilowatt-hour of reported or verified energy savings.

Some program designs and strategies involve payment of incentives directly to utility customers, while others rely on performance payments to third party contractors. Both are valid program designs, but we state upfront that we are disinclined to approve of arrangements in the program design and standard contract where there is not a clear rationale for payments to customers and contractors that lead to performance in the form of energy savings. Ideally, the payment terms should be structured to recognize the amount of risk in the transactions being borne by each entity. We encourage the utilities to think

through the performance risks and the most appropriate party to bear those risks in each case in the portfolio.

In particular, programs that use NMEC for savings determination and incentive payment should incorporate a pay-for-performance element that not only provides adequate motivation to pursue metered savings, but also provides such motivation to the market actors that have access to performance information and the ability to improve or affect performance as it evolves. The contract terms and conditions brought to the Commission should include proposals for these types of payment terms.

3.8. Measurement and Verification requirements

While not a major issue raised in comments on the third party solicitation plans, we are concerned about a potential disconnect between third party program designers and implementers, who will have some responsibility for M&V, and our evaluation responsibilities. While we have encouraged embedded M&V efforts in up-front program designs, we are unclear on the level of M&V expertise among most third party providers, in light of the conflict of interest rules and concerns prevailing in the market as a result of some of our past orders and rules in this area.[8]

In comments on the proposed decision, the Council recommended some clarification to prevent confusion between M&V and evaluation, as well as limit the potential unintended consequences of the rules around conflicts of interest.

[8] *See*, for example, D.05-01-055 at 121-125, discussing a "firewall" requirement between entities that undertake program delivery and those who handle program and portfolio impacts-related studies, but not extending the firewall to include process evaluations.

We agree with the Council's distinction between M&V and evaluation, where it is the M&V that is intended to be "embedded" in the program design by the implementer, with possible guidance from an evaluator, in order to facilitate data collection that can be used in ex-post impact evaluations. With respect to conflict of interest issues, we have removed the requirement that the IOUs hire EM&V contractors specifically to assist the third party program designers and implementers, which may have been the source of some confusion. Thus, consistent with existing rules, an evaluation contractor under contract to an IOU may assist an implementer with program design, so long as that same contractor is not also performing impact evaluations on the same program.

In addition, with respect to entities seeking to contract with the Commission to perform energy efficiency impact evaluations, according to D.05-01-055, entities are specific prohibited from "performing any program and portfolio impacts-related studies at the same time they are under contract for program delivery work." This prohibition also applies to affiliated companies.

Persons or entities under contract to a program implementer to conduct "embedded M&V" fall within this prohibition, but this rule does not prohibit (and in fact we encourage) communication and consultation on the design of embedded M&V data collection between evaluators and implementers. We direct Commission staff to update the Firewall Attachment that is included with the Commission's energy efficiency evaluation requests for proposals to reflect this additional direction with respect to third party M&V design.

We clarify that we will rely on the utility PAs to ensure that third party program designers and implementers have access to information and expertise related to design of M&V methods for their programs but will not require them to hire a contractor specifically for this purpose. We also clarify that Commission

staff will continue to be responsible for the evaluation, measurement and verification activities by conducting impact evaluations for the energy efficiency programs.

In particular, at a minimum, the contract terms and conditions that the utilities design should include uniform requirements for data collection, turnover of billing and energy use data, program tracking data, access to customer sites, and any other provisions required to ensure quality M&V and program evaluation, both during and after the program intervention.

We also delegate to the assigned Commissioner and/or ALJs to issue a subsequent ruling specifying a set of rules, guidelines, and specific requirements to address the critical issues and uncertainties related to M&V, by February 2018. The set of rules will include direction for implementation of programs and projects leveraging NMEC and other forms of embedded M&V in program design, data collection, and savings quantification. The direction may also address other areas related to program administration and reporting under Commission oversight, as well as technical guidance. Some of the items the ruling is intended to cover include:

- Using NMEC in M&V;
- Strategic Energy Management Programs;
- Pay-for-performance programs;

Data collection for deemed, customer, and non-resource programs attempting to embed data collection in program design to support early feedback and rigorous evaluation.

3.9. Schedule

In response to this decision, we require that all of the IOUs update the planned solicitation schedule and make it publicly available on their web sites

within 60 days of the issuance of this decision. The schedule should also be posted on the PEPMA joint website for energy efficiency solicitations. In fact, all solicitation materials should be posted there, including RFAs, RFPs, and any other solicitation notices. Also, in keeping with the coordinated nature of certain solicitations, including those for statewide programs, that the IOUs have already exhibited in their solicitation plans, we encourage them to continue this level of coordination to ensure a smoother and more robust solicitation process overall.

We request that the solicitation schedules also be shared with the CAEECC and posted on its web site for additional transparency. We also expect that the schedule may change further after the Commission issues its decision on the business plans. Thus, the IOUs are also required to keep the schedules up to date and publicly available as the solicitations progress over the next several years and until at least the end of 2022, unless the solicitations have concluded prior to then.

We also ask Commission staff, in coordination with CAEECC if possible, to host a workshop at least every six months after the first solicitation launch, to allow for informal discussion and problem-solving among stakeholders about the progress of the solicitations. These workshops should also be coordinated to incorporate the feedback from the IEs that is required to be delivered to the Commission on a semi-annual basis.

3.10. Other issues

3.10.1. Applicability

In response to the solicitation proposal submitted by SoCalREN, we clarify that the terms of this decision and the third party solicitation requirements apply only specifically to the utility program administrators. However, we encourage SoCalREN, BayREN, and MCE to adhere to the spirit of these requirements when

soliciting third party assistance with program design and delivery, by making the schedule and terms uniform and transparent, and relying on the market expertise to delivery programs, wherever possible.

3.10.2. Programs that do not "count" as third party

The Council asks that we clarify that two particular sets of programs are not eligible to be considered "third party" under the definition in D.16-08-019. The two instances cited by the Council are the Strategic Energy Management (SEM) programs already developed by a consultant, with a specific program design, as well as the limited energy efficiency and demand response integration programs included in the staff proposal issued by ALJ ruling on June 30, 2017 in this proceeding. We agree with the Council that at least this round of these programs already in progress should not be considered as part of the third party requirements. However, that is not to say that efforts in these areas could not be considered as third party in the future, if they are designed (or re-designed) and implemented by third parties at a later point in time.

In addition, although not a focus of the comments on the third party solicitation process, we are aware of uncertainty in the implementation community with respect to the SEM program, and certain other program proposals with SEM-like aspects; we take this opportunity to offer some clarification. The IOUs and their consultants have jointly developed a single SEM program design and evaluation protocol, which will be implemented by third parties individually under contract to each IOU. We clarify that this SEM program is the only program in which NMEC currently may be used to assess savings in industrial facilities from operations and maintenance (O&M) or behavior, retrocommissioning, and operations (BROs)-type activities.

For purposes of the third party solicitation process, we recognize that some aspects of the SEM program may be useful in program design, such as the activity tracking requirements and the evaluation protocol, and such aspects may be incorporated into program proposals outside of the SEM program. However, during the two-year period of the current SEM program engagement, third party programs other than the SEM programs may not incorporate or claim savings from O&M or BRO activities using NMEC at industrial facilities, except for building-related proposals similar to those in the commercial sector.[9] Program proposals that incorporate some aspects of the SEM program design should be distinguished from the separate SEM program, which is standalone and has many required elements.

3.10.3. Coordination among PAs

We agree with the comments of MCE that coordination among all PAs about solicitations, including all of the IOUs, as well as the RENs and MCE, should be encouraged. We do not require, however, that the RFA shortlist results be shared among PAs. Doing so may not only be impractical, but also may violate expectations of confidentiality on the part of bidders and it is not clear what benefits would override those considerations. Each PA is ultimately responsible for its own solicitation process, while as much informal communication and coordination among the PAs as possible is encouraged. To address potential overlap, as recommended by MCE in its comments on the proposed decision, we will require utility PAs to include a contract term that requires third parties to coordinate with other PAs in the same geographic area.

[9] See discussion in D.16-08-019 at 39.

3.10.4. Workpaper issues

GreenFan and Verified raise the issue of allowing for third party submission of workpapers demonstrating savings calculation methodologies. We acknowledge there could be benefits to full consideration of these issues, but intend to undertake such further consideration in the energy efficiency rulemaking (R.13-11-005 or its successor) in the future. In the meantime, the program administrators are required to accept and review all third party workpapers before submission to the Commission.

3.10.5. Interim Contract Extensions for Existing Third Party Programs

The utilities provide in their solicitation plans proposals for transitioning existing third party programs to new implementers, including extending programs beyond the current deadline set forth in D.15-10-028, Ordering Paragraph 22, which limits third party contract extensions to three years beyond the date of issuance of that decision. The Council also supports this proposal. In order to ensure a smooth transition, we agree. The utilities may extend existing third party contracts until new program implementers are in place, to ensure no gaps in program availability or delivery.

4. Comments on Proposed Decision

The proposed decision of ALJ Fitch in this matter was mailed to the parties in accordance with Section 311 of the Public Utilities Code and comments were allowed under Rule 14.3 of the Commission's Rules of Practice and Procedure. Comments were filed on December 4, 2017 by CEE, CLEAResult, the Council, EnergySavvy, GreenFan and Verified (jointly), MCE, NAESCO, NRDC, ORA, PG&E, SBUA, SCE, SDG&E, and SoCalGas, Reply comments were filed on December 11, 2017 by CEE, the Council, GreenFan and Verified (jointly), MCE

and BayREN (jointly), NAESCO, NRDC, ORA, PG&E, SCE, SoCalREN, and SoCalGas.

The vast majority of commenters, including the IOUs, the Council, NAESCO, NRDC, CEE, and ORA, disagreed with the proposed decision's failure to adopt an IE structure to support the third party solicitation process. We have therefore reversed our opinion on this topic, and have included support for an IE structure, as specified further in the text of the decision.

Numerous parties also disagreed with the proposed decision's requirement for a mid-process Tier 2 advice letter filing at the RFA short list and RFP design stage, including the IOUs, NRDC, the Council, ORA, and CLEAResult. We have removed this requirement, and have instead substituted the requirement for an IE structure, as well as the filing of Tier 2 advice letters for contracts or batches of contracts, after award, that are valued at $5 million or more and/or with terms of longer than three years, for Commission review.

Several parties commented that the 60 percent requirement for third party designed and implemented programs should not be moved back to 2022 from 2020, including the Council, CLEAResult, NAESCO, ORA, and NRDC. We will not modify this requirement, in part because some of the delay has been caused by the Commission's process itself, and in part out of an abundance of caution and a desire to see this process be successful, if on a slightly slower timeframe.

The comments of several parties, including ORA and the IOUs, included requests for clarification about whether the third party solicitation process can begin before the business plans are addressed by the Commission. The answer is no. This decision enables the IOUs to begin solicitations for IEs, and to prepare the standard contract terms and conditions, as discussed in this decision, but

does not yet authorize the launch of RFAs, until such time as the programs are addressed by the Commission in a decision on the business plan filings.

CEE's comments, while supporting other aspects of the decision or concurring with others' comments already discussed above, focus primarily on the need for further requirements for diverse contracting and workforce quality standards. Their comments were also generally supported by NRDC. As a result of CEE's comments, we have included additional discussion and requirements associated with both diverse contracting and workforce and quality installation standards.

As a result of the comments from the Council, CLEAResult, and PG&E, we have clarified the transition process for existing third party contracts.

The Council's comments recommended a number of additional improvements to the proposed decision which we have incorporated, including limiting the required standard contract terms and conditions to a subset, clarification of the embedded M&V description, clarification of any potential for evaluation conflicts of interest, and allowing 60 days for posting of implementation plans after contract commencement.

EnergySavvy's comments focused on clarifications to the references to EM&V and M&V in the decision, as well as the potential for conflicts of interest, similar to the Council's points, which we have addressed in the text.

GreenFan and Verified's comments focused again on the issue of third party submission of workpapers directly to the Commission. We do not modify this portion of the decision because this proceeding it not the appropriate venue for addressing overall changes to the workpaper process. This should be addressed with respect to the overall portfolio, as it is not uniquely applicable to the solicitation of third party program design and implementation proposals,

which is the subject of this decision. However, we have made modifications to the language of this decision to clarify the requirements of the existing process, which includes the requirement that the utilities accept and review third party workpapers for possible later review by the Commission. This is also consistent with the comments of NAESCO on this topic.

MCE focuses most of its comments on asking that the Commission explicitly require the IOUs and/or their third party contractors to address the potential for program overlap with CCA programs. We have modified the list of modifiable contract terms required to be addressed by the IOUs to include this topic. MCE's comments also include a request that we clarify that the business plan period is ten years. We decline to make this change, because, as of now, the current business plan period runs only through 2025, though funding will continue to be available on a rolling basis after 2025, while the Commission considers new business plan applications.

PG&E's comments not already addressed above included a request to clarify the applicable third party definition for 2018 to allow for a transition. We have made this change throughout the decision. PG&E also requested a number of other changes which we have determined are not necessary or are inadvisable, including clarifications that Commission staff and consultants will no longer participate in any program designs, declining to require solicitation information with other PAs, except for statewide programs, and removing the requirement for two-stage solicitations after 2022. These can be reevaluated, if necessary, with the benefit of experience.

SBUA's comments on the proposed decision focused on ensuring that the third party solicitations ensure a broad distribution of programs across all markets and subsectors, including small businesses, and that the PRGs represent

diverse stakeholder interests. We have modified the language associated with these topics to take the SBUA comments into account.

SCE and the Council requested that this decision address the statewide lead administrators so that statewide solicitation may begin. We decline to do so; this will be addressed in the overall business plan decision. SCE's other comments are consistent with the other IOUs and/or are already addressed in the discussion above.

SDG&E's comments were consistent with the other IOUs and/or already addressed by others' comments.

SoCalGas' comments address several issues not brought up by other parties, including clarifications on pay-for-performance, intervenor compensation for PRG members, and timing of reporting on third party contracts. We have made modifications throughout the decision consistent with these comments.

5. Assignment of Proceeding

Carla J. Peterman is the assigned Commissioner and Julie A. Fitch and Valerie U. Kao are the co-assigned ALJs in this proceeding.

Findings of Fact

1. D.16-08-019 required each utility program administrator to make a proposal that would result in at least 60 percent of its portfolio being third party designed and implemented by the end of 2020.

2. There has been a great deal of capacity development in the private sector to deliver cost-effective energy efficiency to customers in the past decade.

3. The energy efficiency programs should be designed and implemented by third parties and not utility personnel unless there is a specific and justified reason for involvement of utility personnel.

4. The 60 percent requirement for third party designed and implemented energy efficiency portfolios in D.16-08-019 is a minimum and not a maximum.

5. It is appropriate to ensure a smooth and sustainable transition to the majority of the energy efficiency portfolios being third party designed and delivered over the next five years.

6. A two-stage solicitation process for third party designed and implemented programs is reasonable, where the first stage is a short request for abstract and the second stage is a full request for proposals.

7. There are several risks associated with not having the Commission review and formally approve of the results of the utility third party solicitations, including the risks of contracting bias and poor RFP design leading to unbalanced portfolios and third party solicitation, program, and/or portfolio failure.

8. There are risk associated with requiring Commission approval of all third party contracts, including potential delays in implementation because of the number and scale of contracts that are likely to require review.

9. The Commission can mitigate the risks associated with the third party contracting process by requiring utility program administrators to utilize IEs and requiring Commission review of contracts with values of $5 million or more and/or terms of longer than three years.

10. Procurement review groups are a useful vehicle for providing some transparency into the contracting process and providing feedback to the program administrators throughout the solicitation process.

11. Participation in PRGs is an eligible activity for intervenor compensation, subject to the limitations in that program.

12. Except for SoCalGas, the utility program administrators all proposed to utilize existing independent evaluators with supply-side expertise to provide feedback to the PRGs. IEs would provide feedback or reports to the Commission about the fairness of the contracting process.

13. Commission consideration and approval of a standard contract for third parties with standard and modifiable terms and conditions will help mitigate risks of third party solicitation failure, ensure a level playing field for all participants, and reflect commercial viability.

14. There is a great deal of experience and evidence gleaned over the past several portfolio cycles, as well as studies, in support of requiring certain workforce standards to ensure quality measure installations and energy savings.

15. The Legislature has encouraged increased reliance on pay-for-performance program structures to encourage placing risk for the energy savings delivered on the parties most able to deliver those savings.

16. Maintaining up-to-date third party solicitation schedules and making them widely accessible will help ensure success of the third party solicitations.

17. Providing a semi-annual forum for stakeholder discussion about the progress of the third party solicitations will help improve the quality of the solicitation process.

18. Design of this round of strategic energy management programs and staff proposed programs involving limited integration of energy efficiency and demand response programs do not meet the criteria for third party programs required in D.16-08-019 and addressed by the solicitations covered in this decision.

19. Allowing for extensions of existing third party contracts will help prevent any gaps in program coverage while new third party solicitations are underway and new third party programs ramp up.

20. Requiring regular annual reporting of utility third party contracts in place will provide additional transparency and oversight of the third party solicitation process.

21. Maintenance of updated implementation plans associated with third party programs will encourage program success and transparency, consistent with the terms of D.15-10-028.

Conclusions of Law

1. All utility program administrators proposed third party solicitation plans that comply with the requirements of D.16-08-019.

2. SB 350 emphasized greater reliance on pay-for-performance programs and metered energy savings evaluation.

3. The Commission should require the utilities to transition to at least 60 percent third party designed and implemented energy efficiency portfolios by the end of 2022, and not 2020, as previously required in D.16-08-019, in order to ensure a smooth and sustainable transition from the current portfolios.

4. The transition to at least 60 percent third party designed and delivered portfolios should proceed with a 25 percent minimum by no later than December 31, 2018, a 40 percent minimum by no later than December 31, 2020, and a 60 percent minimum by no later than December 31, 2022. The utility PAs should be permitted to count budgets towards the 25 percent requirement in 2018 in accordance with the third-party definition in effect prior to D.16-08-019 as well as the third-party definition included in D.16-08-019, for 2018 only, to allow for ramp up time.

5. All utilities should utilize a two-stage solicitation process for third party programs unless there is a specific schedule-related reason only one stage is possible. The two-stage process should be the predominant approach.

6. It is impractical for all third party contracts to be reviewed and approved by the Commission, given the scale of the programs and the time constraints involved in program launch.

7. The utilities are ultimately responsible for the success of their energy efficiency portfolios including delivered savings, as represented by the energy savings performance incentive mechanism, among other things.

8. The Commission should review, via a Tier 2 advice letter, any contracts that are valued at $5 million or more and/or that have contract terms of longer than three years.

9. Commission staff should review each advice letter to ensure compliance with the approved business plan, compliance with all Commission decisions, that the contract is not a result of a biased solicitation process, and that the solicitation process did not thwart the intentions of successful program design, delivery, and realized savings.

10. Commission staff should produce and maintain a template for the filing of the advice letters required.

11. Each utility should have at least one PRG, with members who are not financially interested in solicitation results and represent diverse stakeholder interests, to provide feedback during the third party solicitation process. The PRGs should be involved at all stages of the solicitation process. PRG participation should be eligible for intervenor compensation.

12. The utilities should be required to conduct their PRGs in a similar manner to the supply-side PRGs, including advance meeting notices, and advance delivery of materials.

13. The Energy Division Director should approve of the composition of the PRGs for each utility.

14. The Commission should require each utility PA to hire a pool of IEs with energy efficiency expertise, and should not rely on the existing pool of supply-side IEs, unless they have specific energy efficiency experience.

15. The IEs should be required to: monitor the entire third party solicitation process, from RFA design through contract execution; file semi-annual reports to the Commission in the applicable energy efficiency rulemaking, detailing observations about the solicitation process; provide consultation support to PRG members; prepare reports on each solicitation to present to the PRGs; and prepare specific reports on any solicitation and contract resulting in an award of $5 million or more and/or for a term of more than three years.

16. Each utility PA should be required to have appropriate IEs on board prior to the launch of its first RFA.

17. The Commission should continue to monitor the progress of the solicitations and may choose to hire IEs directly itself in the future.

18. The Commission should require the utility PAs to submit for consideration and approval standard and modifiable contract terms and conditions for the third party solicitations. This contract should be considered in the context of this proceeding.

19. The utility PAs should be required to propose, in their modifiable contract terms, a standard definition of diverse workforce, along with metrics and targets for tracking progress toward the goals, for third party contractors.

20. The utility PAs should be required to propose, in their modifiable contract terms, a set of workforce and installation quality standards, applicable to individual sectors or measures, as appropriate.

21. Pay-for-performance arrangements should be encouraged in the third party solicitations and the utility PAs should design payment structures in their standard contracts to address these types of arrangements.

22. The utility PAs should be responsible for ensuring successful and consistent M&V strategies by their third party program implementers.

23. Commission staff should continue to be responsible for conducting impact evaluations for all energy efficiency programs, including the third party programs.

24. Identification and specification of guidelines and requirements to address critical issues related to M&V should be delegated to the assigned Commission and/or ALJs to issue via ruling no later than the end of February 2018 for use in third party solicitations.

25. The utility PAs should be required to maintain up-to-date schedules and plans for their third party solicitations on their own and the PEPMA web sites, and make those materials available to the CAEECC for posting 10 days from the date the Energy Efficiency Annual Reports are filed.

26. Commission staff, separately or in coordination with the CAEEC, should host semi-annual workshops after the first solicitation launch and through the end of 2022, to allow for informal discussion and problem-solving among stakeholders about the progress of the third party solicitations and for consideration of the semi-annual IE reports.

27. This round of strategic energy management programs and the staff-proposed programs for limited integration of energy efficiency and demand

response should not count towards the third party percentage requirements ordered in this decision.

28. Programs that utilize aspects of the SEM program design should be allowed to be used by third party implementers as part of the process ordered in this decision, but those should not be confused or counted as SEM.

29. All program administrators, including but not limited to the utility PAs, should be encouraged to coordinate and share information on third party solicitations, but sharing of confidential short lists should not be required. To further address overlap, utility administrators should be required to include standard contract language requiring third parties to coordinate with other program administrators in the same geographic area.

30. The issue of third party development and submission of workpapers, beyond current/existing requirements, should be addressed in R.13-11-005 or its successor.

31. Any pre-existing third party contracts should be allowed to be extended beyond the deadline set forth in D.15-10-028 Ordering Paragraph 22 and beyond the execution of contracts for new third party programs that meet the third party definition in D.16-08-019, until such dates as the projects under such pre-existing contracts are complete, to prevent gaps in program availability while new third party solicitations are underway and to prevent ongoing projects from being interrupted.

32. The utilities should be required to include in their annual energy efficiency reports a listing of all third party contracts (including a confidential version, if necessary) that includes name of counterparty, length of contract, value of contract, market segment and sub-segment addressed including customer type and size, and any other relevant summary information.

33. It is reasonable for Commission staff to determine the relevant contract information to include in annual energy efficiency reports and posted by the utilities.

34. Implementation plans associated with successful third party contracts should be developed and posted, consistent with the requirements in D.15-10-028, within 60 days after new contract execution.

O R D E R

IT IS ORDERED that**:**

1. Pacific Gas and Electric Company, San Diego Gas & Electric Company, Southern California Edison Company, and Southern California Gas Company shall ensure that their energy efficiency portfolios contain third party designed and implemented programs with the following minimum percentages by the dates given:

    a. At least 25 percent by December 31, 2018. For 2018 only, the percentage requirement may also include third party programs under the definition of third party previously in place prior to the adoption of Decision 16-08-019.

    b. At least 40 percent by December 31, 2020

    c. At least 60 percent by December 31, 2022

2. Pacific Gas and Electric Company, San Diego Gas & Electric Company, Southern California Edison Company, and Southern California Gas Company shall file a Tier 2 advice letter for each third party contract, or a batch of third party contracts, that is valued at $ 5 million or more and/or with a term of longer than three years, for Commission review.

3. Pacific Gas and Electric Company, San Diego Gas & Electric Company, Southern California Edison Company, and Southern California Gas Company

shall each convene at least one procurement review group for energy efficiency third party solicitations, made up of members of non-financially-interested parties, including Commission staff and the Office of Ratepayer Advocates, with membership approved by the Director of the Commission's Energy Division.

4. Pacific Gas and Electric Company, San Diego Gas & Electric Company, Southern California Edison Company, and Southern California Gas Company shall conduct procurement review groups following the following requirements:

   a. All meetings shall be noticed at least three business days in advance.

   b. Any materials to be discussed in the meetings shall be distributed at least 48 hours in advance.

   c. Meeting notes shall be distributed within one week of the meeting conclusion or before the next scheduled meeting, whichever comes first.

   d. Call in numbers shall be provided to all participants.

   e. The groups shall be consulted at all stages of the solicitation process, including, but not necessarily limited to:

      A. Reviewing each sector- or segment-specific solicitation plan;

      B. Providing timely input into the draft solicitation language and evaluation criteria; and

      C. Providing recommendations based on review of materials.

   f. Feedback from the procurement review groups shall be included in all advice letter filings seeking approval of the request for abstract short list and/or the request for proposal to be issued.

5. Pacific Gas and Electric Company, San Diego Gas & Electric Company, Southern California Edison Company, and Southern California Gas Company shall individually solicit and contract with a pool of independent evaluators (IEs) with energy efficiency expertise, which shall be approved informally by the Director of the Commission's Energy Division. The IEs shall be on board prior to

the launch of the first Request for Abstract. The IEs shall provide at least the following services:

a. Consultation and support to the procurement review groups.

b. A report on each solicitation to be presented to the appropriate procurement review group.

c. A semi-annual report on the overall process and conduct of the third party solicitations, to be filed in the relevant energy efficiency rulemaking proceeding.

d. An individual report on the solicitation process resulting in any contract award valued at $5 million or greater and/or with a contract term of longer than three years, to be submitted along with the Tier 2 advice letter seeking Commission review of such contracts.

6. Pacific Gas and Electric Company, San Diego Gas & Electric Company, Southern California Edison Company, and Southern California Gas Company shall, within 60 days of the issuance of this decision, shall select one company from among them to file a motion in this proceeding for approval of a standard contract for third parties, with standard terms and conditions that address items a, b, k, and l, below, with placeholder terms for the other modifiable items. The motion shall also include a proposed definition of disadvantaged workers, with a metric for tracking progress toward a goal, as well as a set of workforce and installation quality standards to be incorporated in third party contracts.

a. Eligibility (type of business, license requirements, insurance and bonding requirements, etc.)

b. Safety requirements

c. Workforce qualifications and quality installation requirements

d. Progress and evaluation metrics

e. Contract term/length

f. Diverse and disadvantaged business and employee terms, including small businesses, if applicable

g. Payment schedule and terms, both to third party and to participating utility customers (for incentive payments)

h. Payment provisions for pay-for-performance arrangements

i. Data collection and ownership requirements

j. Measurement and verification requirements, including guidelines about normalized metered energy consumption design requirements

k. Dispute resolution process

l. Termination process.

m. Coordination with other program administrators.

7. Pacific Gas and Electric Company, San Diego Gas & Electric Company, Southern California Edison Company, and Southern California Gas Company shall, within 60 days of the date of this decision, and again after the issuance of a Commission decision on their business plans, plus periodically thereafter, post an up-to-date schedule of planned third party solicitations on their own web sites as well as the proposal evaluation and proposal management application web site. The updated schedules shall also be made available periodically to the California Energy Efficiency Coordinating Council.

8. Pacific Gas and Electric Company, San Diego Gas & Electric Company, Southern California Edison Company, and Southern California Gas Company shall include in their energy efficiency annual reports, beginning with the 2018 reports, a listing of all third party contracts in place, along with at least the following information (with confidential versions, if necessary). Similar information shall also be posted within ten days on the utility web sites, the joint

utility proposal evaluation and proposal management application web site, and made available to the California Energy Efficiency Coordinating Council:

a. Name of counterparty
b. Length
c. Dollar value (aggregated, if necessary, for public versions)
d. Market segment, sub-segment, sizes, and types of customers addressed

9. Pacific Gas and Electric Company, San Diego Gas & Electric Company, Southern California Edison Company, and Southern California Gas Company (utilities) may extend existing third party contracts beyond the limits specified in Decision 15-10-028, Ordering Paragraph 22 and beyond the execution of contracts for new third party programs, in order to prevent gaps in program availability or delivery, during the new third party solicitations. At such time as new third party contracts are executed that meet the requirements of the third party program definition in Decision 16-08-019 and the underlying energy efficiency projects covered by the pre-existing contracts are completed, a transition plan consistent with that proposed by the utilities in their solicitation plans shall be instituted to allow for the normal and necessary ramp down of the existing contractors/contracts and ramp up of the new contractors/contracts.

10. Pacific Gas and Electric Company, San Diego Gas & Electric Company, Southern California Edison Company, and Southern California Gas Company shall ensure that implementation plans associated with successful third party contracts are developed and posted, consistent with the requirements of Decision 15-10-028, within 60 days after contract execution.

11. Applications 17-01-013, 17-01-014, 17-01-015, 17-01-016, and 17-01-017 remain open.

This order is effective today.

Dated January 11, 2018, at San Francisco, California.

MICHAEL PICKER
President
CARLA J. PETERMAN
LIANE M. RANDOLPH
MARTHA GUZMAN ACEVES
CLIFFORD RECHTSCHAFFEN
Commissioners

Appendix A

***** SERVICE LIST A1701013/ A1701014/A1701015/A1701016/A1701017****

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