

SAN DIEGO GAS & ELECTRIC AND SOUTHERN CALIFORNIA GAS COMPANY SOLICITATIONS WORKSHOP

November 16, 2021



Safety Message

Karen Mar, SoCalGas Policy Lead

November is...

1. COPD (Chronic Obtrusive Pulmonary Disease) Awareness Month
2. Lung Cancer Awareness Month
3. Holiday Safety:
 - Manage stress
 - Wash hands often to help prevent the spread of germs
 - Practice fire and food safety

[*CDC | National Center for Environmental Health | Calendar of Events](#)

Welcome

Roger Sun, Senior Category Manager

Welcome!

Agenda & Speakers

Agenda	SPEAKERS
Safety Message	Karen Mar, SoCalGas Policy Lead
Welcome	Roger Sun, Sr. Category Manager
Antitrust Compliance Guidelines	Si-Hung Choy, Sr. Counsel
Housekeeping	Karen Mar, SoCalGas Policy Lead
ESA Program Solicitations	Irma DePratti, ESAP SDG&E; Mark Aguirre, ESAP SoCalGas
Key Bidder Requirements: Format, Responsiveness, Housekeeping, Cyber Security, Contractor Safety, Insurance, and Supplier Diversity	Cesar Callejas , Category Mgr. SoCalGas; Paul Pruschki , Engineering, Systems & Support Mgr. SDG&E and SoCalGas; Laura Orr , Sempra ISN Team; Meredith Garcia Obeso & Jae Joo , Supplier Diversity Advrs. SDG&E and SoCalGas

ANTITRUST COMPLIANCE GUIDELINES

Si-Hung Choy, Sr. Counsel

It is our policy and practice to obey antitrust laws and to avoid all conduct that unreasonably restrains competition. This policy requires the avoidance of any conduct that violates, or that might appear to violate, antitrust laws. Among other things, antitrust laws forbid any agreement between or among competitors regarding prices, availability of service, terms of sale, division of markets, allocation of customers or any other activity that unreasonably restrains competition, including components of pricing such as vendor or contractor costs. It is the responsibility of every participant at this meeting to carry out this commitment.

ANTITRUST COMPLIANCE GUIDELINES

Avoid discussion of:

1. Current and future pricing and costs (except to the extent necessary to discuss the topics below, and even then, not disaggregated by vendor)
2. Current and future contracts for supply or purchase, including contract terms and conditions
3. Competitors
4. Vendors
5. Future plans for development of transmission resources
6. Future plans for development of utility-owned generation
7. Forecasts of costs of commodities or transmission services

Housekeeping

Karen Mar, SoCalGas Policy Lead

1. Workshop will be providing a general overview of the solicitation process for SDG&E and SoCalGas.
2. Workshop will not cover the details of the content within each solicitation.
 - Each solicitation will have workshops/Bidders conference to address details
 - Workshops/Bidders Conference forthcoming
3. Q&A Sessions: Q's typed/submitted through Slido; A's verbally answered; transcripts will be available after the workshop.
4. Workshop Recording Available at: <https://app.sli.do/event/4l3gyqg3>
5. Legal disclaimers

Housekeeping – Legal Disclaimers

Karen Mar, SoCalGas Policy Lead

1. Recording

- Please be advised that the ESA Program Solicitation Workshop will be RECORDED, and SDG&E and SoCalGas may (but is not required to) make such recording available to third parties, including conference participants, other bidders, governmental and regulatory agencies and/or the general public, following its conclusion. By attending the ESA Program Solicitation Workshop, bidders consent to such recording and SDG&E and SoCalGas' rights to make such recording available to such third parties.

2. Bidder Questions and Communications for all ESA Program Solicitations

- All Bidder inquiries and concerns related to this ESA Program Solicitation Workshop or any ESA Program Solicitation, including the solicitation process, commercial, technical, and contractual terms (as applicable), shall be submitted through PowerAdvocate (or through questions in the Q&A portion of this webinar) by accessing your relevant event, Request for Proposal and using the Messaging Tab. No questions are to be directed to any other Company employee. Direct contact with other Company employees, Procurement Review Group members, or Independent Evaluators regarding this RFP or the Solicitation may result in disqualification.

Q&A Session

Type in your questions and the IOUs will verbally answer.

1. Workshop Recording Available at: <https://app.sli.do/event/4l3gyqg3>
2. RFP/Bidding Packet at: www.poweradvocate.com
3. Solicitation Information and Q&A Transcripts at:
 - www.sdge.com/energy-savings-assistance-programs-solicitations
 - www.socalgas.com/regulatory/energy-savings-assistance-program
 - www.pepma-ca.com
4. Supply Management Contacts:
 - SDG&E: Kayla Rice at KRice2@sdge.com
 - SoCalGas: Cesar Callejas at Ccallejas@socalgas.com

ESA Program Solicitations

Irma DePratti, ESAP SDG&E; Mark Aguirre, ESAP SoCalGas

ESA Program Solicitations

- Background, Overview, Timeline, Lifecycle

ESA Program Solicitation Background

» Programmatic changes ordered in D.21-06-015

1. Energy savings focus instead of number of homes treated focus
2. Prioritization of key customer segments
3. Program budgets decreased from previous cycle
4. Third party implemented Multifamily Whole Building (MFWB) program
5. Pilot focused on deeper energy savings

» Innovative IOU program designs approved

- Technology-driven program design
 - Online enrollment & energy education

SDG&E ESA Program Solicitation Overview

Multifamily Whole Building (MFWB)

- Commission directed solicitation for Multifamily Common Area, In-Unit, MFWB for the Northern and Southern Region
 - SDG&E and PG&E IOU leads
- Per Decision, contract execution date no later than November 30, 2022, and program launch no sooner than January 2023
- 2023-2026 Budget: \$173M

Pilot Plus Pilot Deep

- Commission directed pilot to save between 5-50% energy savings
- Flexible design options
 - SDG&E will solicit for 3rd party design and implementation
- Per Decision, pilot launch July 2022
- 2022-2026 Budget: \$7.6M

ESAP Base Program

- SDG&E to conduct ESA Program solicitation
- New Program design, measures and focus on savings warrant a solicitation
- New contract awarded Q2 2022 and effective on January 1, 2023
- Timing of the solicitation aligns with the redesign of multifamily and the implementation of MFWB
- 2023-2026 Budget: \$48M

ESAP IT Solutions

- Audit and scheduling tools to support new savings and customer focused design
- RFP awarded end of Q2 2022
- New IT solutions in place Q1 2023
- Budget: TBD



SCG ESA Program Solicitation Overview

ESAP Base Program

- New capabilities/measures (ex: solar thermal water heating measure & comprehensive home health and safety check-up), existing capabilities/measures, and inspections
- New contract awarded Q4 2022 and effective on January 1, 2023
- 2023-2026
- Budget: ~\$330M

Pilot Plus Pilot Deep

- Commission directed pilot to save between 5-50% energy savings
- SoCalGas and SCE designed with 3rd party implementation
- Per Decision, pilot launch July 2022
- 2022-2026 Budget: ~\$33M

Customer Online Audit

- On-line audit tool at the time of enrollment to gather additional home information prior to a home visit.
- New contract awarded Q2 2022 and effective on January 1, 2023
- RFQs are scheduled for Q4 2021, RFPs taking place Q1-Q2 2022, bidder selection (also) occurring in Q2 2022, with design & implementation taking place Q3-Q4 2022
- Budget: TBD

Customer Platform

- Program workflow management system and digital customer engagement and digital contractor engagement (Uberization)
- RFP awarded end of Q2 2022
- New IT solutions in place Q1 2023
- Budget: TBD



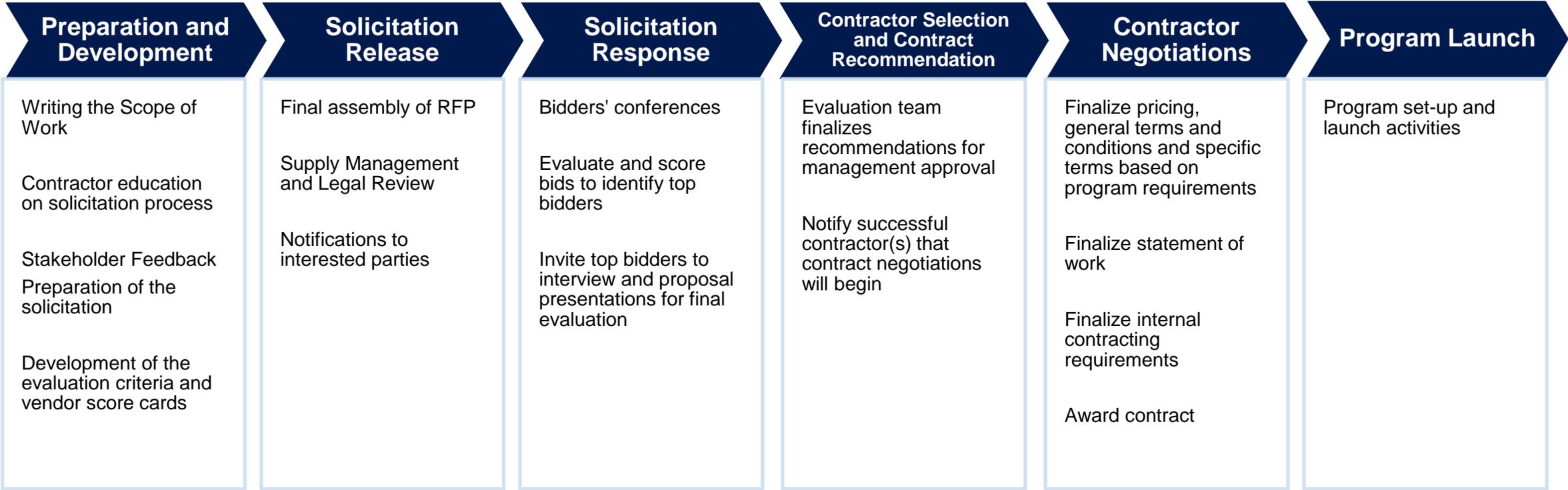
SCG ESA Program Solicitation Timeline*

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

*Schedule maybe subject to change at IOU's discretion.



Solicitation Life Cycle



ATTRIBUTES OF A SUCCESSFUL PROPOSAL

Irma DePratti, ESAP SDG&E; Mark Aguirre, ESAP SoCalGas

Respond to
Objectives

Customer
Focused

Demonstrate
Capabilities

Competitive
Pricing

ATTRIBUTES OF A SUCCESSFUL PROPOSAL

Respond to Objectives

Respond to
Objectives

ATTRIBUTES OF A SUCCESSFUL PROPOSAL

Respond to the Objectives



Review the Request for Proposal
Thoroughly



Set the tone & be sure your response is to
the correct IOU



Check your work



Be on-time

ATTRIBUTES OF A SUCCESSFUL PROPOSAL

Customer Focused

Customer Focused

ATTRIBUTES OF A SUCCESSFUL PROPOSAL

Customer Focused

Key Trends Influencing the ESA Program

- Energy savings-driven treatments
- Prioritized key customer segments
- Streamlined delivery of services

ATTRIBUTES OF A SUCCESSFUL PROPOSAL

Demonstrate Capabilities

Demonstrate
Capabilities

ATTRIBUTES OF A SUCCESSFUL PROPOSAL

Demonstrate Capabilities



Explain, educate, & demonstrate capabilities of your proven strategy



Identifying key energy savings strategies



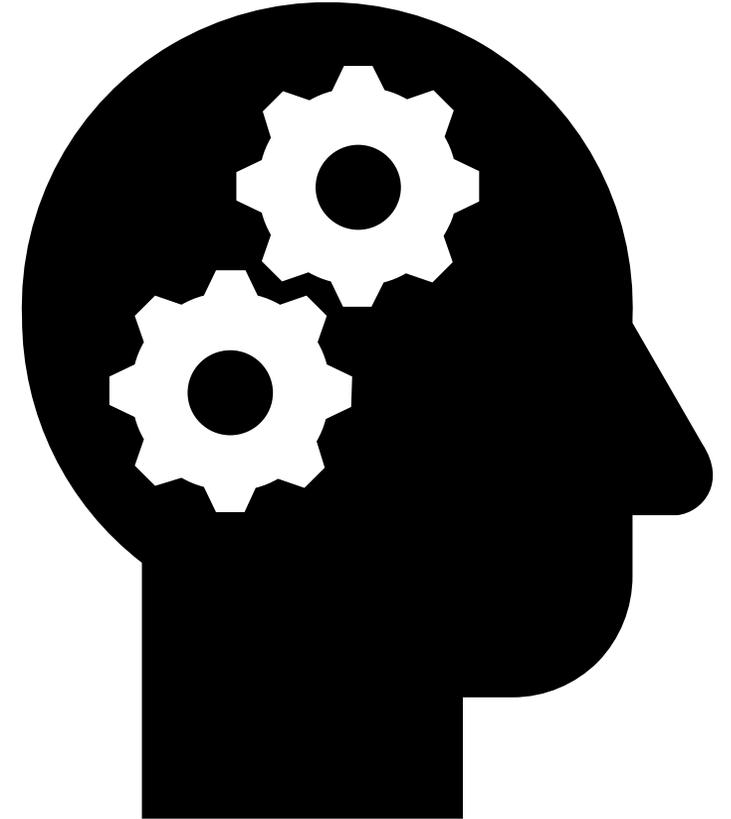
Connection to key customer segments



Low Income Programs Experience



Why you and not other vendors



ATTRIBUTES OF A SUCCESSFUL PROPOSAL

Competitive Pricing

Competitive Pricing

ATTRIBUTES OF A SUCCESSFUL PROPOSAL

Competitive Pricing



- Pricing is specific to the type of solicitations occurring
- Stay tuned for future bidder conferences

Q&A Session

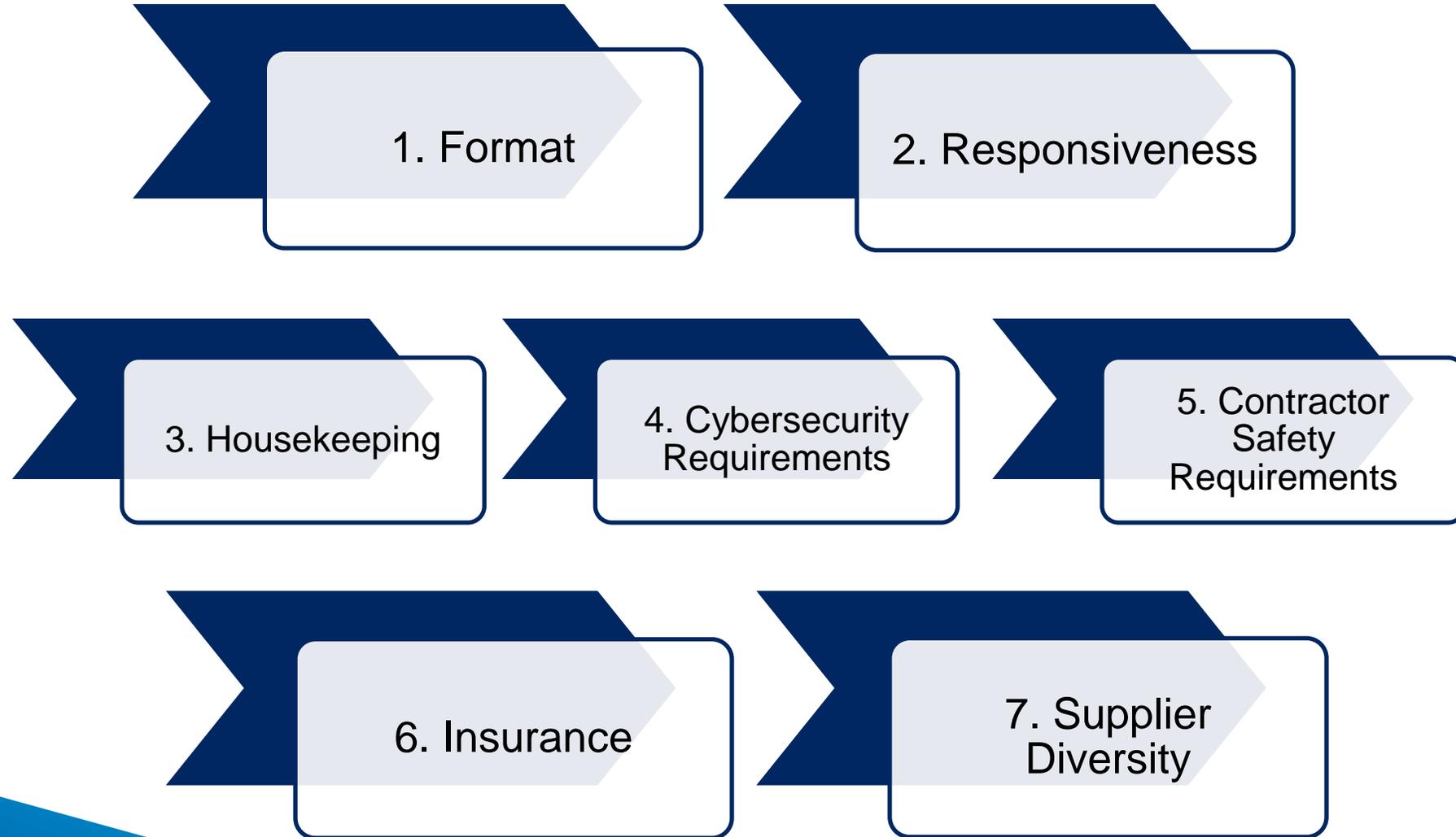
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Key Bidder Requirements

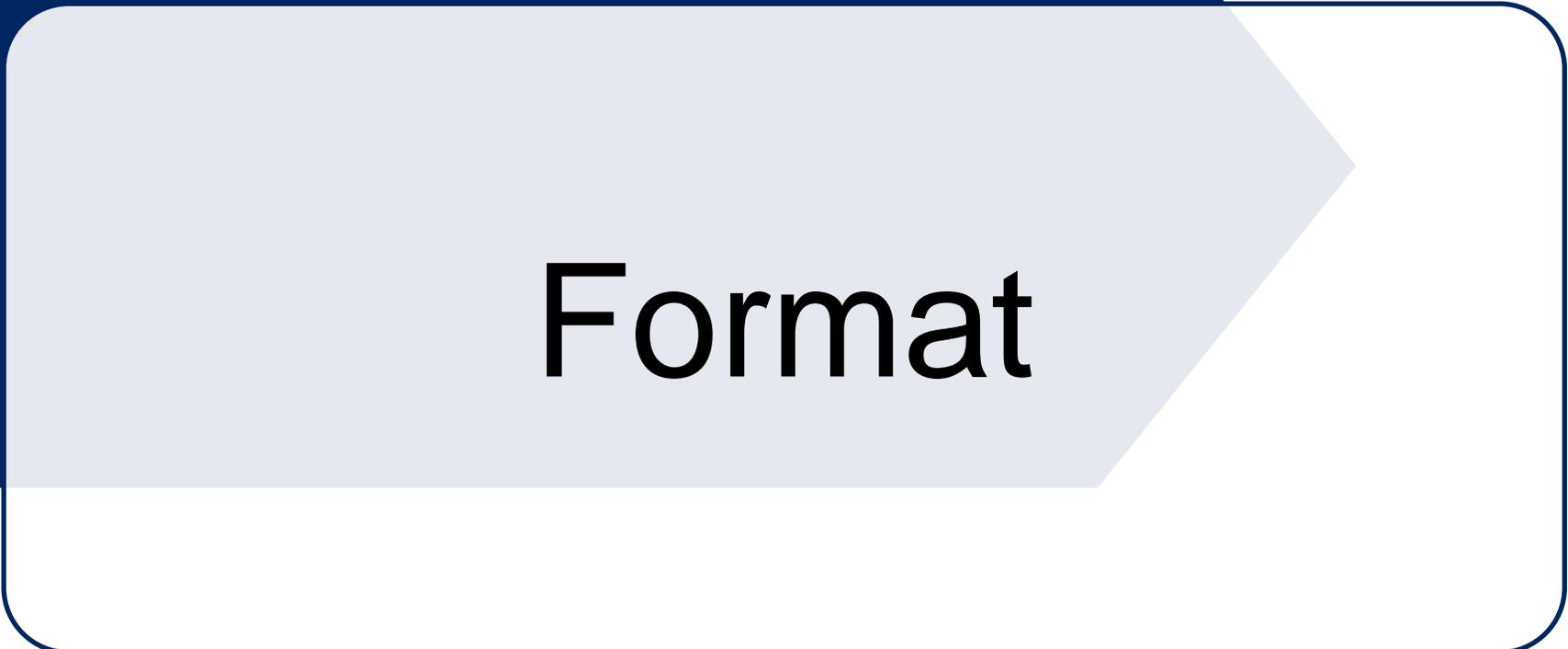
KEY BIDDER REQUIREMENTS

KEY BIDDER REQUIREMENTS



Key Bidder Requirements – Format

Cesar Callejas, Category Mgr. SoCalGas



Format

Key Bidder Requirements – Format - www.pepma-ca.com

The screenshot shows the PEPMA website homepage. At the top, there is a navigation bar with links for Home, Contact Us, and FAQs. Below this is a banner for PEPMA (PROPOSAL EVALUATION & PROPOSAL MANAGEMENT APPLICATION). The main content area is divided into several sections:

- Welcome to PEPMA**: California Statewide Investor Owned Utilities (IOU) and Energy Efficiency Solicitation Website. This site serves as a resource for:
 - Individuals and organizations to learn about IOU energy efficiency programs
 - Potential bidders to self-register their information
 - Learning about upcoming energy efficiency contracting opportunities
 - Exchange of bid information between individuals, organizations and IOUs
 - Qualifying companies to provide required services to the IOUs
- Participating IOUs**: Logos for Southern California Edison Company, Southern California Gas Company, Pacific Gas and Electric Company, and San Diego Gas & Electric Company.
- Contracting Opportunities**: Click here to view available IOU contracting opportunities for both third party energy efficiency program work and professional services.
- Register Now**: Click here to register with the Proposal Evaluation and Proposal Management Application (PEPMA). Once registered you will be eligible to participate in solicitations for upcoming contracting opportunities.
- Resources**: Links to Contractor Referral Program, Supplier Diversity (SCE), EE Best Practices, Work papers (SCE), Cost Effectiveness Tool (CET) Training 1 of 3 docs, Cost Effectiveness Tool (CET) Input Measure Notes 2 of 3 docs, Cost Effectiveness Tool (CET) Presentation 3 of 3 docs, 3rd Party Work Paper Training Chapter 1 of 4, 3rd Party Work Paper Training Chapter 2 of 4, 3rd Party Work Paper Training Chapter 3 of 4, and 3rd Party Work Paper Training Chapter 4 of 4.
- Upcoming Events**: Includes Innovative Idea Submissions and IDEA 365 Submission Opportunities.

Two red arrows point to the 'Please Login or Register' section on the right side of the page. The first arrow points to the 'Please Login or Register' header, and the second arrow points to the 'New user? Register here' link.

Key Bidder Requirements – Format - www.pepma-ca.com

PEPMA
PROPOSAL EVALUATION & PROPOSAL
MANAGEMENT APPLICATION

Home Pepma Application Contact Us FAQs Logout Logged in as : CCallejas@socalgas.com

Welcome to PEPMA

California Statewide Investor Owned Utilities (IOU) and Energy Efficiency Solicitation Website

This site serves as a resource for:

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- Exchange of bid information between individuals, organizations and IOUs
- Qualifying companies to provide required services to the IOUs

Participating IOUs

Southern California Edison Company

Southern California Gas Company

Pacific Gas and Electric Company

San Diego Gas & Electric Company

Contracting Opportunities

Click here to view available IOU contracting opportunities for both third party energy efficiency program work and professional services.

Register Now

Click here to register with the Proposal Evaluation and Proposal Management Application (PEPMA). Once registered you will be eligible to participate in solicitations for upcoming contracting opportunities.

Resources

- [PEPMA User Instructions](#)
- [3P Work Paper Development Training 11.29.2018](#)
- [PG&E 2018 EE Annual Report](#)
- [Southern California Edison Online Privacy Notice](#)
- [SDG&E Energy Efficiency Programs Annual](#)

Upcoming Events

[3rd Party Energy Efficiency Information & Resources](#)

Key Bidder Requirements – Format - www.pepma-ca.com



Home Pepma Application Contact Us FAQs Logout Logged in as : CCallejas@socalgas.com

Public Events

- [1. SDG&E Statewide Residential HVAC QI/QM Request for Abstracts Releasing in October 2021](#)
- [2. SDG&E Evaluator for SASH and DAC-SASH Programs Request for Proposals Releasing in September 2021](#)
- [3. Southern California Edison - Energy Savings Assistance Program Solicitations](#)
- [4. SoCalGas Large Public Solicitation Request for Proposal](#)
- [5. SDG&E and SoCalGas Energy Savings Assistance Programs to Host Web-based Solicitations Workshop - November 16, 2021](#) ←
- [6. SDG&E's We Thrive Series Event - "How to Start Doing Business with SDG&E"](#)

Event	SDG&E and SoCalGas Energy Savings Assistance Programs to Host Web-based Solicitations Workshop - November 16, 2021
Date/Time	Tuesday, November 16, 2021 9:00 AM
Location	San Diego Gas & Electric Company and Southern California Gas Company
Documents	Workshop Details

The SDG&E and SoCalGas Energy Savings Assistance (ESA) Programs will host a web-based workshop to provide prospective bidders with general solicitation information such as proposal requirements -technical & commercial, cybersecurity, contractor safety requirements, customer data, and privacy requirements, diverse business enterprises (DBEs), and other basic qualifications (e.g., what constitutes an acceptable bid, qualification process, etc.). The workshop will also include an overview of respective utilities' ESA solicitation plans.

See attachments.

Key Bidder Requirements – Format – www.poweradvocate.com

Need support?
Call PowerAdvocate support
at 857-453-5800
(Mon-Fri, 8 a.m. to 8 p.m. **EST**)
or email:
support@poweradvocate.com.

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A Verisk Business

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HOME PRODUCTS SOLUTIONS MARKETS EVENTS RESOURCES COMPANY COST INSIGHTS

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

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

In the Spotlight Request a Demo Learn More

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

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

- About Us
- Careers
- Contact Us
- Contact Support

Key Bidder Requirements – Format – www.poweradvocate.com

Click to view Supplier Intelligence Dashboard

Click to view Contract Intelligence Dashboard

Buyer filter

Navigation bar

PowerAdvocate

Dashboard Profile Company Help Logout

Events Portals Contracts

Dashboard

Company Filter: All Companies

Fill-In Data Sheets

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

Open & Pending Pre-Bid events

Pending (no Pre-bid) and Closed events

Buying entity

Click to view the event's Status tab

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

Click numbers to view event tabs

Datasheet available

No datasheet available

Key Bidder Requirements – Format – www.poweradvocate.com

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

Pre-Bid | Bid

Select All | Download Selected Files | Clear All

Technical Information

Document Description	Issue Date	Ref ID	Rev #	File Name	File Size	Download
Pier23 Pilings RFP	5/30/10	133-01	C	p23pile.pdf	742 KB	<input type="checkbox"/>

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

Pre-Bid | Bid

Upload Bid Proposal

Document Type * [Select from List] Issue Date 01/06/2011 Reference ID * Required Field

Select File(s) Location Browse... Selected File(s) p23 abp_rev2.pdf X p23eir.pdf X

Bid Submissions

Commercial

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



Key Bidder Requirements - Format

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

1. Supplier Info ... 2. M&WBE Rep ... 3. Company - 27 ... 4. Commercial Printable

Save Data Your information can be changed after it is saved. If you leave this page without saving it first, you will lose all unsaved data.

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

Create New Message Search Inbox: Search Send email notifications? Yes No

▼ **Inbox (3)** New/Unread (1)

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

▶ Sent (1)

▶ Drafts (1)

Key Bidder Requirements – Format – RFP Checklist

Upload	Reference	Document or Platform Type	Completed on or Uploaded to PowerAdvocate Sourcing Intelligence™ Platform
Required Submission Information to PowerAdvocate Sourcing Intelligence™ Platform			
Bidder Information	Company Information Tab	PowerAdvocate	
Contact Information	Company Information Tab	PowerAdvocate	
Employee Information	Company Information Tab	PowerAdvocate	
License, Insurance and Financial Information	Company Information Tab	PowerAdvocate	
SDG&E Sustainability Questionnaire	Sustainability Tab	PowerAdvocate	
Proposal Acknowledgement Form	Attachment 1	Microsoft Word Document	
Scope of Services	Abstract Section 1	Microsoft Word Document	

Key Bidder Requirements – Responsiveness

Cesar Callejas, Category Mgr. SoCalGas



Responsiveness

Key Bidder Requirements – Responsiveness

Proposal Acknowledge Form

- Complete
- Signed & Submitted
- In-Compliance

Checklist

- Reviewed
- Checked
- Signed & Submitted

Content

- Clear Proposal
- Clear Map to CPUC Objectives

Methodology and Program Design

- Notify if Implemented Elsewhere
- Clear Picture of Methodology and Design
- Keep it Simple

Key Bidder Requirements – Responsiveness

Operations

- Summary of Operations
- Past Clients and References

Staffing, Resources, & Overlap

- How Will You Support The Proposed Program?
- How Will You Support if Already Contracted with Other IOU's?

Key Personnel & Key Staff

- List the Core Staff
- Resumes
- Letters of Recommendations

Key Bidder Requirements – Responsiveness

Bench Strength

- If core member drops, who is the back-up

Familiarity

- Demonstrate How Familiar You Are With The Low-Income Programs and key customer segments

Key Bidder Requirements – Responsiveness

Sub-Contractor

- Detail The Sub-contractors Abilities
- List All Sub-contractors With Applicable Certifications

Financial, Safety and Certifications

- Provide Relevant Financial Information
- Safety Records
- Relevant Certifications

Market Programs

- Demonstrate how you will market the program
- Provide Data and Specifics

Key Bidder Requirements – Responsiveness

Authorization

- Terms & Conditions

Solution

- Provide a Solid Solution for Complex Markets
- Reliable, Dependable, Implementable

Bidder Interviews (If Selected)

- Key Team Members

Key Bidder Requirements – Housekeeping

Cesar Callejas, Category Mgr. SoCalGas



Housekeeping

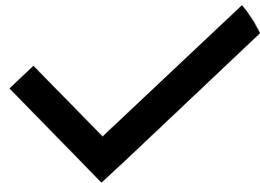
Key Bidder Requirements – Housekeeping



PEPMA: Delete Outdated Information



Ensure all contact information is current on all platforms



Be accurate and complete

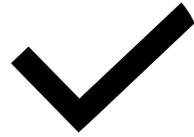
Key Bidder Requirements – Housekeeping

- Supply all service and product information
 - Brand Name, Product Name, Technical Details
- Full Technical Plan, if requested
- Complete all required Forms

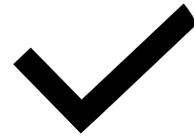
Key Bidder Requirements – Housekeeping Do's



Conform to the font instructions



Tell us what we need to know



Use the Checklist

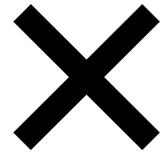


Tell a Clear Story

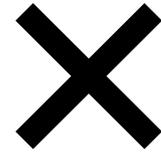
Key Bidder Requirements – Housekeeping Don'ts



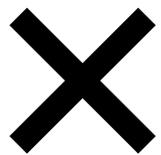
Change or Modify the Font



Make us Guess what solution you are proposing



Deviate from the instructions



Provide anything else than what we are asking

Key Bidder Requirements – Housekeeping

Common Mistakes to Avoid



Making The Utility Fill Out Your Bid Proposal



Modifying The Cost Proposal Template



Common Typos



Missing Documents



Cyber And Contractor Safety Requirements

Q&A Session

Type in your questions and the IOUs will verbally answer.

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Key Bidder Requirements – Cyber Security Requirements

Paul Pruschki, Engineering, Systems & Support Manager

Cyber Security Requirements

Key Bidder Requirements – Cybersecurity Requirements

Data Requirements

- Establish data requirements during contract negotiations
- Use the least amount of customer data necessary
- Destroy data as soon as it is no longer needed

Sempra's Privacy Greenlight (PGL) Process

- Assesses shared data and a contractor's capability to secure it
- Are you hosting, accessing or storing customer data?
- The # of sensitive data fields shared with / accessible to the contractor

Terms & Conditions

- Cyber Risk Liability Insurance

Information Security Requirements

- Logon credentials and passwords will be protected
- Product security for storing, processing, and transmitting data
- Annual security assessments / testing by an independent third party

Key Bidder Requirements – Contractor Safety

Laura Orr, Sempra ISN Team

Contractor Safety Requirements

ISN's 5-Step Process

1 Identify Contractor/Supplier Base & Assess the Risk

All-Encompassing Risk Factors

Work/Supply Type, Work Culture & Quality, HSE Risk, Financial & Insurance Risk, ESG & Supplier Diversity, Business Continuity Risk, Subcontractors

2 Collect the Data

Contractor & Supplier Reported Data



Company-Level • Project & Site-Level • Individual-Level

3 Review & Verify the Data



ISN Review and Verification Services Team

- Insurance/Workers Comp
- Written Programs
- RAVS Plus Survey & Interview
- OSHA Forms



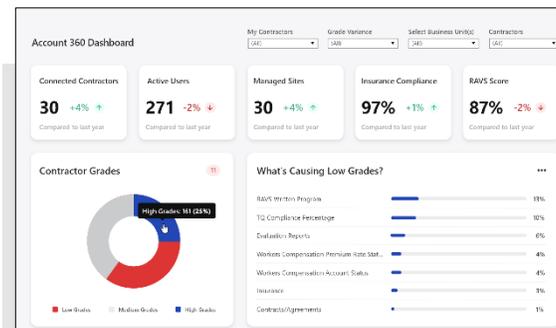
Third Party

- Web Scraping
- Data Transfers

4 Score & Benchmark Contractors/Suppliers

Grade Component	Status	Points	Gaps
Questionnaire	Satisfactory	10 / 10	✓
Written HSEQ Programs	RAVS score is 100	20 / 20	✓
Implementation Assessment	RAVS Plus score is 90	5 / 10	✗
Serious Injury & Fatality Rate	Satisfactory	15 / 15	✓
Post Job Evaluation	Post Job Eval is between 90 and 100	10 / 10	✓
Insurance	Current Documents are Accepted	20 / 20	✓
Commercial Questionnaire	Satisfactory	3 / 5	✗
Acknowledgement Form	Acknowledged	5 / 5	✓
Cybersecurity	Satisfactory	5 / 5	✓
Total		93 / 100	

5 Analyze & Report on the Data

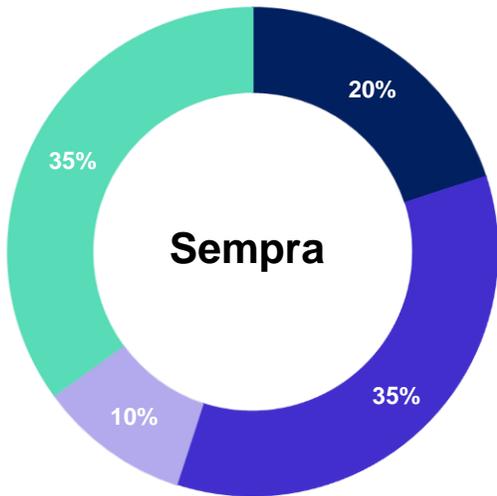


Repeat & Monitor

Client Input & Ongoing Monitoring

- Audits/Assessments
- Sourcing Capabilities
- Post Job Evaluations
- System Integration

Sempra Requirements & Grading



Grade Components

- 20% HSE Cultural Questions
- 35% HSE Statistics
- 10% Experience Modifier
- 35% Written Programs

Grading Details

A (100) – Recommended For Use

B (70 – 99.99) – Acceptable to Use

C (60 – 69.99) – Variance Request form with Director Approval Required to Use this Company

F (-200 – 59.99) – Variance Request form with VP Approval Required to Use this Company

Showstopper

Fatalities

Modifiers

Sempra Post Job Evaluation

Safety Statistics Variable

Fatalities Variable

Sempra's Contractor Scorecard

Scorecard

F

Variance Request Form with VP Approval Required to Use this Company

[Grading Details](#)

Grade Since 10/29/2021

[View Questionnaire Buckets](#)

Grade Component	Status	Points	Edit
HSE Statistics	Satisfactory	30 / 35	
Written Programs	RAVS score is 62.85	0 / 35	
HSE Cultural Questions	Exceptional	20 / 20	
Experience Modifier	Rate is 0.71	10 / 10	
Fatalities	No Fatalities or Indicated Not in Business	0 / 0	
Sempra Post Job Evaluation	SDG&E Safety Observation Form is between 0 and 0	0 / 10	
Safety Statistics Variable	Safety Statistics Variable - SDG&E Safety Team Use Only grade Not Applicable	0 / 15	
Fatalities Variable	Fatalities Variable - SDG&E Safety Team Use Only grade Not Submitted (System)	0 / 50	
Site Tracker	Status is Incomplete	-40 / 0	
Total		20 / 175	

Contractor/Supplier Support and Benefits

Streamlined Qualification Process

- No fee for additional clients or sites
- Eliminates duplicative work
- Access to award-winning customer service team
 - Assigned Account Representative*
 - Monthly Educational Webinars



Insurance Agent/Broker Tool



Learning Management System**



Contractor Culture Survey



Incident Management Tool



Marketing Exposure and Benchmarking

- Visibility to ISN Hiring Clients via a searchable company profile
- Benchmark performance against industry
- 60% of contractors added a Hiring Client Connection in 2020



ISN Smart Search



Contractor User Group Meetings and Webinars

ON CUSTOMER SUPPORT

“Service and support are world class.”

- Paul Tilmon, Safety Manager, James Machine Works, LLC.

ON CENTRALIZED REQUIREMENTS

“Saves us numerous hours per year.”

- Bruce Mueller, Safety Director, Gagnon Inc

ON MARKETABILITY

“ISNetworld has opened many new opportunities for our company.”

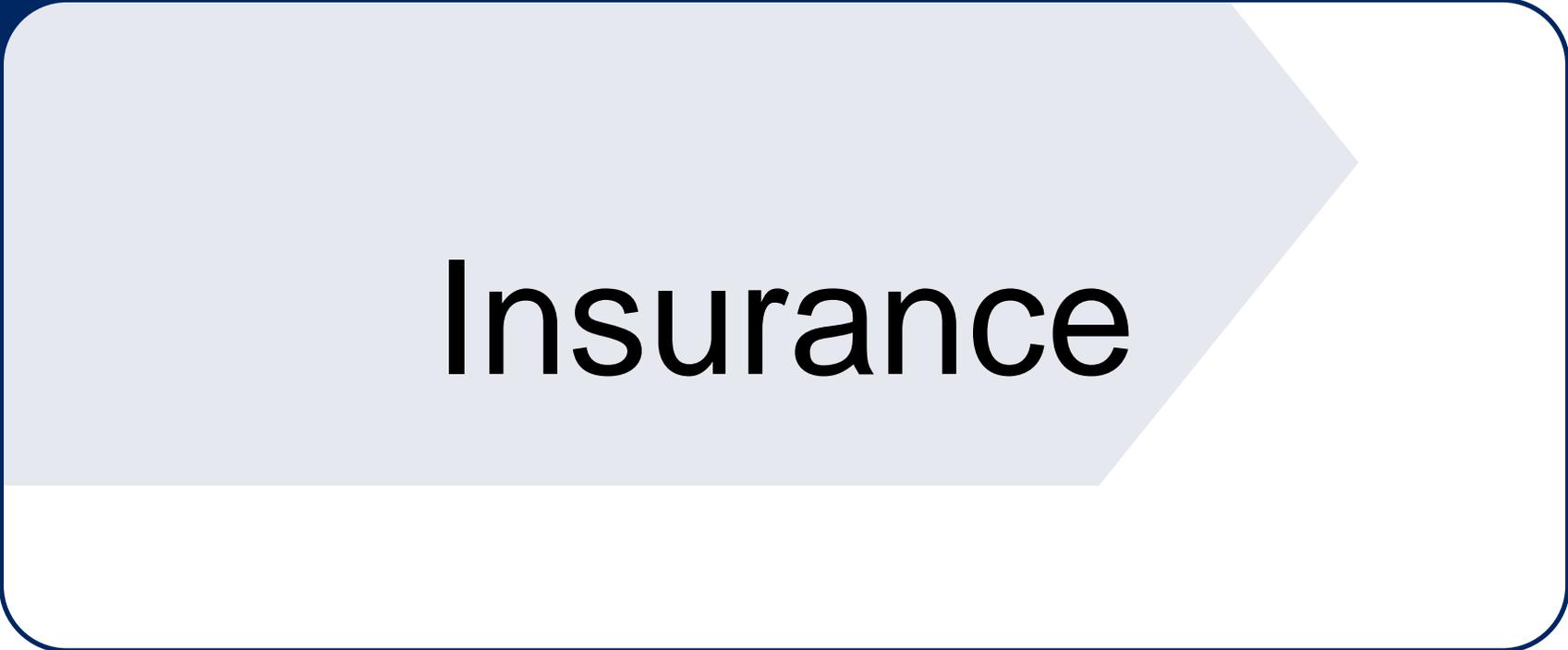
- Peggy May, Owner/VP, Triangulation Inc.

*Large contractor customers

**Includes 5 complimentary trainings per employee (max 100 per company); verified content provided by United Academy, NSC and MEA

KEY BIDDER REQUIREMENTS – Insurance

Cesar Callejas, Category Mgr. SoCalGas



Insurance

KEY BIDDER REQUIREMENTS – Insurance

Insurance

**RFPs Must Meet Minimum
Levels Of Insurance**

No Exceptions

KEY BIDDER REQUIREMENTS – Insurance

Commercial General Liability: Not Less Than \$2M

Commercial Auto Liability: Not Less Than \$1M

Pollution Liability: Not Less Than \$2M Per Occurrence

Cyber Risk Liability: Not Less Than \$2M Per Claim

Umbrella/Excess Liability: Not Less than \$5M Per Claim

KEY BIDDER REQUIREMENTS – Supplier Diversity

Jae Joo & Meredith Garcia Obeso, Supplier Diversity Advrs. SoCalGas and SDG&E

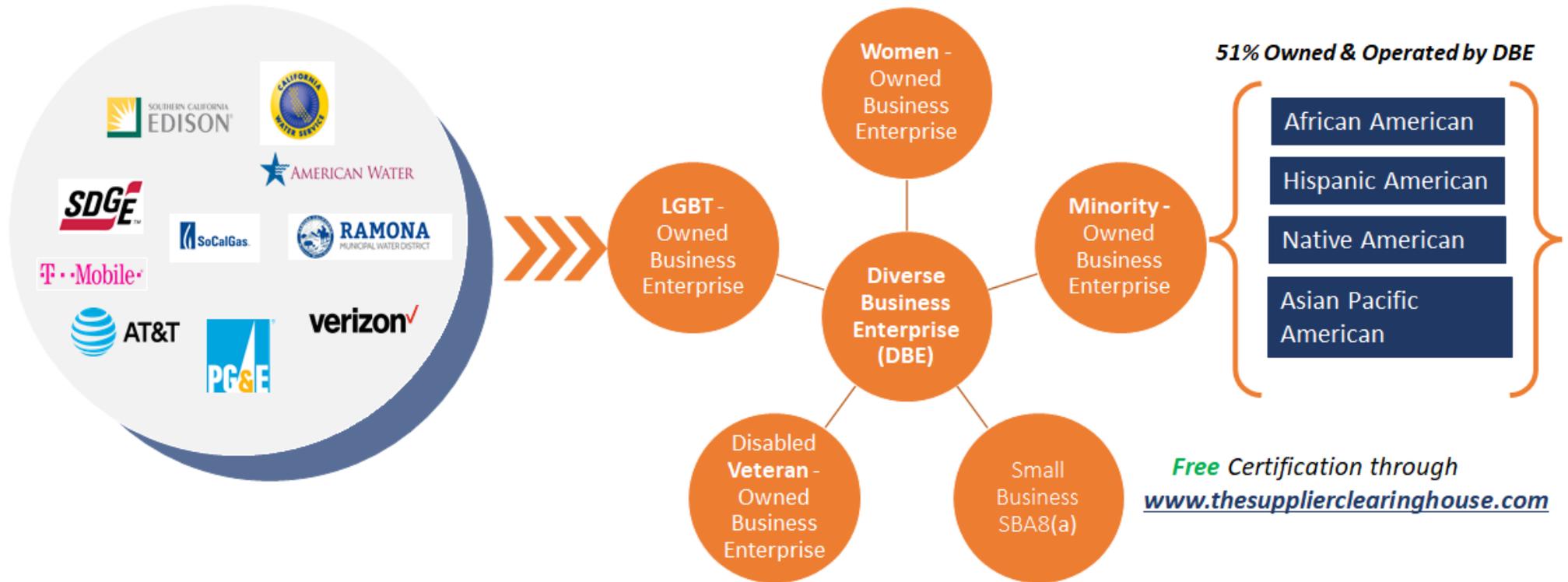


Supplier Diversity

KEY BIDDER REQUIREMENTS – Supplier Diversity

Supplier Diversity

How we got started?



SoCalGas Supplier Diversity Highlights

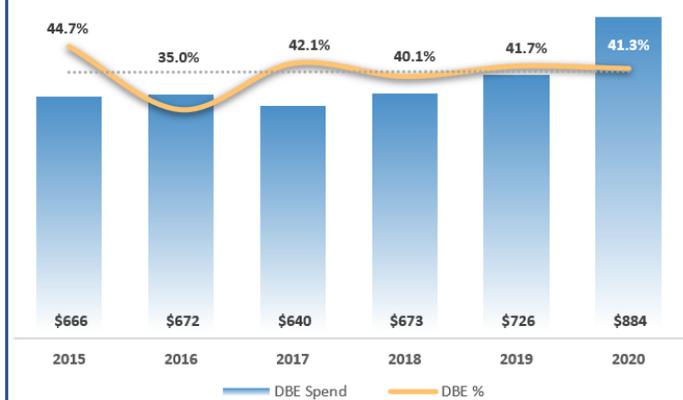
SUPPLIER DIVERSITY 2020 HIGHLIGHTS



SUPPLIER DIVERSITY 2020 HIGHLIGHTS

<p>\$2.1 BILLION total procurement</p>	<p>\$884.2 MILLION spend with diverse firms</p>
<p>total purchases with diverse suppliers</p> <p>41.3%</p>	<p>new diverse firms</p> <p>135</p>
<p>AMONG TOP 25 SoCalGas suppliers are diverse firms</p> <p>15</p>	<p>CPUC goal surpassed</p> <p>28 YRS</p>
<p>diverse suppliers working with SoCalGas</p> <p>555</p>	<p>of our diverse suppliers are based in California</p> <p>92%</p>
	<p>diverse prime suppliers</p> <p>312</p>
	<p>suppliers received technical assistance</p> <p>1,271</p>
	<p>in SCORE program spend</p> <p>\$32.2 MILLION</p>

DIVERSE BUSINESS ENTERPRISE –SoCalGas 2015 - 2020



KEY FACTORS FOR SUCCESS

"It's just how we do business."

- Active supplier diversity efforts for 30+ years
- Clear goals and commitment from top down
- All employees participates
- All suppliers are key to our success
- Company culture (executive support) promotes diversity
- DBE goals part of key performance indicators (KPI's)
- DBE increases competition and energizes innovation
- Has an economic impact in our communities
- Makes good business sense
- Celebrate successes

KEY PROGRAMS/ENHANCEMENTS

- Technical Assistance/Development Programs
- Supplier Diversity Summit
- SCG Supplier Diversity Prime Watch List
- Expanded Supplier Diversity Champions
- DBE Business Showcases
- CBO Forum/Focus Groups

SDG&E Supplier Diversity Highlights

SDG&E 2020 Success Story

A historic year in the making!

SDG&E injected **\$2.1 billion** into the economy.

Of that amount, **\$872 million** was invested on small & diverse suppliers, representing **41.6%** of the total expenditures

2020 marked the **eighth consecutive year** that SDG&E supplier **diversity** spending surpassed **40%**

SDG&E and SoCalGas Goal

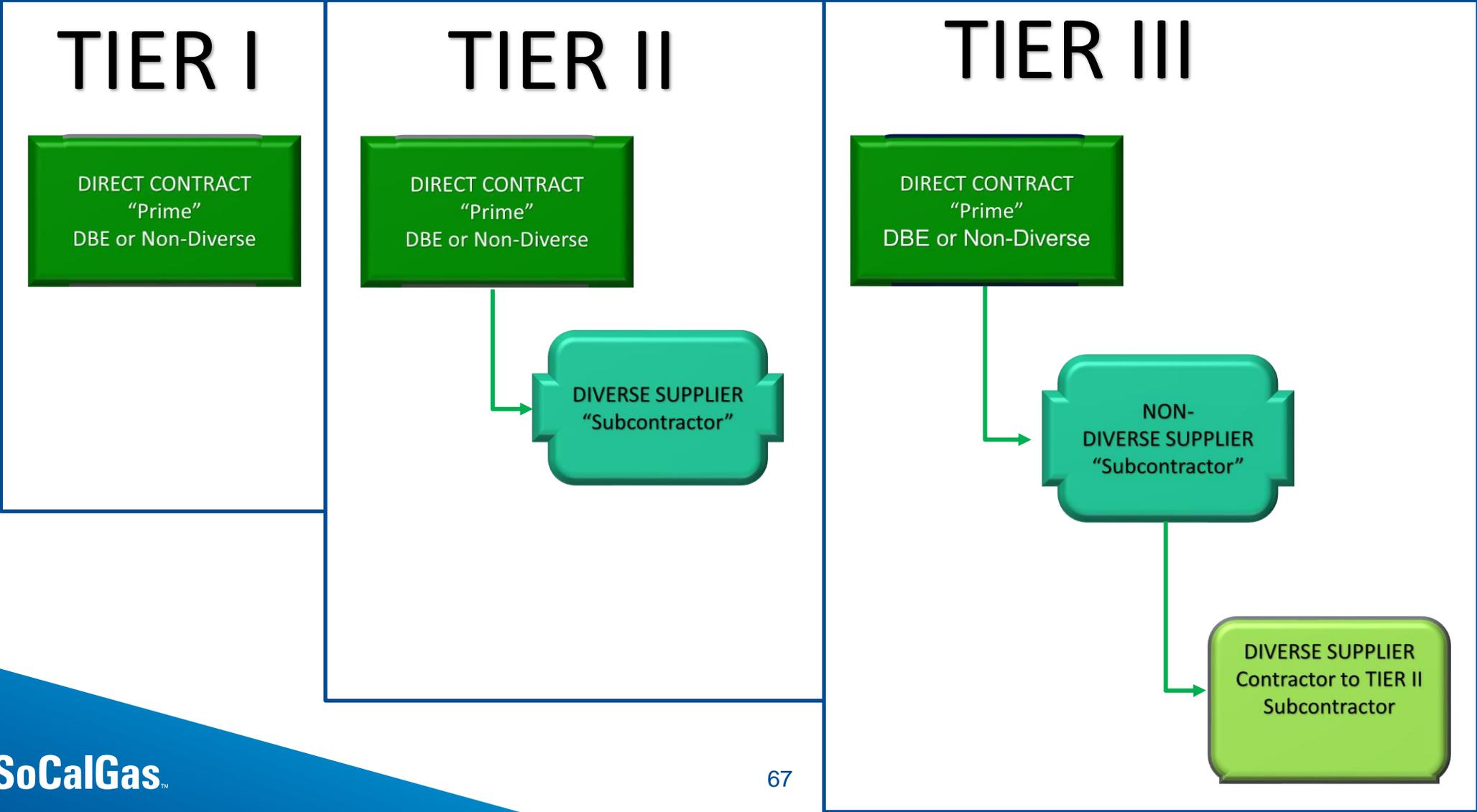
42%

SoCalGas and SDG&E Goal with Diverse Suppliers

Supplier Diversity



Supplier Diversity – Diverse Business Enterprise (DBE) Subcontracting Opportunities



Supplier Diversity Symposium Event

- **Purpose:** to create greater visibility and accessibility to the prime contractors to increase subcontracting opportunities for qualified diverse businesses.
- **Host:** Supplier Diversity groups from SDG&E, SoCalGas, SCE, and PG&E
- **Date:** Monday, December 13, 2021
- **Time:** 1:00 p.m. – 3:30 p.m. PST
- **Virtual Event**
- **Submit registration form:** Organizations interested to register at:
<https://forms.office.com/r/GHb7ZCxME4>
- **Registration Form Deadline:** Friday, November 19, 2021



**QR Code to Access
Registration Form**

Supplier Diversity- Symposium Event

» Registration Form

» Section 1. Organization Contact Information

Organization Contact Information

1. Organization Name *

2. Organization Address *

3. Point of contact at your Organization *

4. Point of contact Telephone Number *

5. Point of Contact E-mail *

6. Provide company Website: *

Supplier Diversity- Symposium Event

- » Registration Form
- » Section 1. Organization Contact Information

7. Do you plan to participate as a Prime Supplier ? *

Yes

No

8. Do you plan to participate as a Sub-Contractor *

Yes

No

Supplier Diversity- Symposium Event

» Section 2. Organizational Capabilities

9. Please provide 2-3 sentences describing your business *

Enter your answer

12. Please list professional services offered by your organization: *

Enter your answer

10. Have you ever done business with the energy utility industry? *

Yes

No

13. Please list the organization professional: Licenses, Permits, Registrations, Approvals, and/or CA State Licensing Board *

Enter your answer

11. Have you ever done business with non-utilities? *

Yes

No

Q&A Session & Wrap Up

Type in your questions and the IOUs will verbally answer.

1. Workshop Recording Available at: <https://app.sli.do/event/4l3gyqg3>
2. RFP/Bidding Packet at: www.poweradvocate.com
3. Solicitation Information and Q&A Transcripts at:
 - www.sdge.com/energy-savings-assistance-programs-solicitations
 - www.socalgas.com/regulatory/energy-savings-assistance-program
 - www.pepma-ca.com
4. Supply Management Contacts:
 - SDG&E: Kayla Rice at KRice2@sdge.com
 - SoCalGas: Cesar Callejas at Ccallejas@socalgas.com

Upcoming Solicitation Events

Northern and Southern Multifamily Whole Building (MFWB) Solicitations

– Hosted by PG&E and SDG&E

Date: November 17, 2021

Time: 9:00 a.m. – 12 p.m. PST

Meeting Location:

Slido: <https://app.sli.do/event/jb4rzadd> [nam10.safelinks.protection.outlook.com]

For general questions, please contact: Eric Kissel, eric.kissel@pge.com.

Upcoming Solicitation Events

Supplier Diversity Symposium Event

– Hosted by PG&E, SCE, SDG&E, and SoCalGas

Date: Monday, December 13, 2021

Time: 1:00 p.m. – 3:30 p.m. PST

Virtual Event Submit registration form at:

<https://forms.office.com/r/GHb7ZCxME4>

Registration Form Deadline: Fri., November 19, 2021

For questions, please contact: Meredith Garcia Obeso, MGarciaO@sdge.com



QR Code to Access
Registration Form

Thank You!