Introducing... Emerging Technologies! Evaluation of Vendor Partner Solicitation Efforts

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Introduction

The greatest thing since sliced bread?
Introduction - ETP

So the IOUs in California have a special program meant to do just that.

<table>
<thead>
<tr>
<th>IOU Program Category</th>
<th>Core IOU Programs</th>
<th>3P Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>IOU Program</td>
<td>Emerging Technologies Program (ETP)</td>
<td>IDEEA365 solicitation</td>
</tr>
<tr>
<td>ETP Subprogram</td>
<td>1. Tech Dev Support</td>
<td>IDEEA 365 Innovative</td>
</tr>
<tr>
<td></td>
<td>2. Tech Assessments</td>
<td>TRIP Solicitation</td>
</tr>
<tr>
<td></td>
<td>3. Tech Intro Support</td>
<td></td>
</tr>
<tr>
<td>Fulfillment Method</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Solicitation Approaches

The following table summarizes the solicitation approaches used by different IOUs (Investor-Owned Utilities) and their respective formats and focuses:

<table>
<thead>
<tr>
<th>IOU</th>
<th>TRIP</th>
<th>IDEEA365</th>
</tr>
</thead>
<tbody>
<tr>
<td>Format</td>
<td>New solicitation process done within ETP using IDEEA365 as a template</td>
<td>Pulled from existing solicitation</td>
</tr>
<tr>
<td>Focus</td>
<td>Seeking innovative technology with a specific focus on EE technologies in the commercialization phase</td>
<td>Special innovative solicitation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Seeing innovative delivery methods for technologies (more broad)</td>
</tr>
</tbody>
</table>
### Solicitation Approaches

#### Solicitation Approach Comparison

<table>
<thead>
<tr>
<th></th>
<th>TRIP</th>
<th>IDEEA365</th>
</tr>
</thead>
<tbody>
<tr>
<td>IOU</td>
<td>[Image of IOU]</td>
<td>[Image of IOU]</td>
</tr>
<tr>
<td>Stages</td>
<td>One</td>
<td>Two</td>
</tr>
<tr>
<td>Maximum per Project Budget</td>
<td>$300,000</td>
<td>$150,000</td>
</tr>
<tr>
<td>E3 Calculations Required</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>None specified</td>
</tr>
</tbody>
</table>
Evaluation Goals:

What is the effect of the solicitation process on the quality of submissions?

• Pros and cons in meeting ETP objectives

• IOU’s differing needs and how they chose to fulfill the ETP objectives

• Seek opportunities to offer suggestions for improvement
## Solicitation Approaches

<table>
<thead>
<tr>
<th>IOU</th>
<th>TRIP</th>
<th>IDEEA365</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solicitation Rounds Reviewed</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td># Bids Reviewed</td>
<td>45</td>
<td>TBD</td>
</tr>
<tr>
<td>Program Staff Interviews</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Vendor Interviews</td>
<td>3 A, 6 R</td>
<td>TBD</td>
</tr>
<tr>
<td>Vendor Interviews</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>

*Note: TBD indicates 'to be determined'*
Findings

- TRIP may entice new vendors
- IDEEA365 may entice more experienced vendors
Findings

• Risk = key consideration
• Vendor submissions over time
Findings

• Preferred two staged approach
• Cost effective calculations in second stage
• Consider utility resources
Findings

Education and communication benefits all

Misunderstanding of proposal weaknesses
Findings

Partnering is beneficial

Pathway to IOU

Credit: New Yorker
Lessons Learned

When developing solicitations, risks and rewards need to be considered, specifically related to:

- Budget
- Savings substantiation documentation
- Resources needed to educate vendors about documentation
- Extent of measure commercialization
- Desired implementation experience
Lessons Learned

Tradeoffs associated with bringing in new vendors:

Pros

• Expanding the pool of measures that may be considered
• Bringing in more competition
• Training new vendors on how to implement programs and building EE infrastructure

Cons

• More training required
• More staff time to review proposals, many may not be applicable due to inexperience
• Lack of proven experience (less certainty of success)
• Vendor burnout
Questions?

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