



## CPUC Independent Evaluator Report Template (Short Form)

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This template should be used whenever an Independent Evaluator submits a report on the outcome of an IOU RFO bid process for review by the California Public Utilities Commission. This short form template should be used for transactions that do not require submission of an application for CPUC approval, including those transactions that are documented in the IOU's Quarterly Compliance Report and/or are submitted to the Commission for approval via advice letter.

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1. Describe in detail the role of the IE throughout the solicitation and negotiation process.
2. How did the IOU conduct outreach to bidders, and was the solicitation robust?
3. Was the outreach sufficient and materials clear such that the bids received meet the needs the solicitation was intending to fill?
4. Please evaluate the fairness of the IOU's bidding and selection process.  
(i.e. quantitative and qualitative methodology used to evaluate bids, consistency of evaluation methods with criteria specified in bid documents, etc.)
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6. If applicable, describe safeguards and methodologies employed by the IOU to compare affiliate bids or UOG ownership proposals. If a utility selected a bid from an affiliate or a bid that would result in utility asset ownership, explain and analyze whether the IOU's selection of such bid(s) was appropriate.
7. Based on the complete bid process, is (are) the IOU contract(s) the best overall offer(s) received by the IOU?
8. If the contract does not directly reflect a product solicited and bid in an RFO, is the contract superior to the bids received on the products solicited in the RFO? Explain.
9. Is the contract a reasonable way of achieving the need identified in the RFO?
10. Based on your analysis of the RFO bids, the bid process, and the overall market, does the contract merit Commission approval? Explain.

11. Based on the complete bid process, should some component(s) be changed to ensure future RFOs are fairer or provide a more efficient, lower cost option?

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