



CALIFORNIA

TECHNICAL FORUM

DRAFT Business Plan 2015

To support the growth and success of energy efficiency and IDSM through a technically rigorous, independent, transparent peer review of California energy efficiency values and other related technical information.

2015 Business Plan			
Goal	Metrics	Tactics (Cal TF)	Tactics (Others)
1. Clearly memorialize DEER, other ex-ante requirements, methods, and assumptions for select High Impact Measures.	DEER Requirements Document [December 2015]	Cal TF staff work develop “DEER Requirements” document containing DEER requirements, measurements and assumptions for high impact measures currently active in DEER, as selected by TF Measure Selection Subcommittee.	CPUC ex-ante consultants review draft DEER requirements, methods and assumptions for completeness and correctness for each DEER measure as they are produced.
2. Review and approve selected workpapers.	At least fifteen (15) workpapers for new or outdated statewide measures reviewed by Cal TF through consensus decision-making. [December 2015]	<ol style="list-style-type: none"> 1. New/outdated measure recommendations solicited from TF Members, POU, others. 2. TF Measure Selection Subcommittee selects measures for Cal TF review. 3. TF and/or TF subcommittee reviews/comments on standardized abstract. 4. TF resolves outstanding issues on abstract through consensus decision-making. 5. WP developer develops WP consistent with approved abstract. TF sub-committee addresses technical issues that arise during abstract or WP development. 6. TF reviews/comments on draft WP. 7. TF resolves outstanding issues on WP through consensus decision-making. 8. Measure, measure parameters, underlying support, Comparison Exhibit for non-consensus items, and decisions leading up to TF approval of Measure parameters posted on Cal TF website. 	<p>CPUC ex-ante team provides timely feed back on</p> <ul style="list-style-type: none"> • Applicable DEER values, and • Any pre-existing work <p>For all measure abstracts submitted.</p> <p>CPUC ex ante team provides feedback on Cal TF-produced WP and other work product, including value of Cal TF, areas where Cal TF is not working well, suggestions for improvement.</p> <p>Program Administrators may submit Approved Measures to the applicable decision-making entity (CPUC or POU Governing Boards).</p>

<p>3. Develop Cross-Cutting Technical positions papers.</p>	<p>TF approves at least three (3) Cross-Cutting Technical position papers.</p>	<p>The TF identifies three Cross-Cutting Technical position papers it would like to work on.</p> <p>Cal TF staff supports technical policy discussions through research on technical policy issue, producing draft position papers for TF review/comment, and soliciting TF comments and approval.</p> <p>Cal TF staff posts approved technical policy positions on Cal TF website.</p>	<p>Resulting technical position papers may be submitted to CPUC or other entities (such as the CEC) for review and comment.</p>
<p>4. Review and update POU Technical Reference Manual.</p>	<p>TF reviews/updates at least eight (8) high priority measures/measure categories in POU TRM for technical accuracy and adequate documentation.</p> <p>[December 2015]</p>	<ol style="list-style-type: none"> 1. TF subcommittee reviews/comments on values, documentation for selected measure categories. 2. TF subcommittee provides input on other sources/documentation related to selected measure categories. 3. Cal TF staff develops updated POU TRM values/documentation based on TF feedback. 4. TF subcommittee reviews/comments on draft updated POU TRM sections. 5. TF subcommittee resolves outstanding issues/disagreements on updated POU TRM sections through consensus decision-making. 6. Full TF reviews and approves subcommittee recommendations. 7. Cal TF-approved updated POU TRM sections posted on Cal TF website. 	<p>POU PAC and TF members provide input on which POU TRM high priority measure would benefit from Cal TF review in 2015.</p>

<p>5. Facilitate Statewide Coordination of IOU Workpapers</p>	<p>Cal TF Statewide Coordination Launch Plan [March 2015]</p>	<p>Cal TF staff develops and implements launch plan for coordination effort in 2015 to:</p> <ol style="list-style-type: none"> 1. Coordinate measure offerings 2. Coordinate workpaper updates 3. Provide consistent templates 	<p>IOU Tech Leads supply Cal TF staff with current list of workpapers (approved and in development). Tech leads update Cal TF staff as workpaper statuses change. CPUC Staff supports Cal TF staff statewide coordination role, provides guidance on 2015 workpaper requirements.</p>
<p>6. Release RFQ for Technical Forum members to be seated June 1, 2015</p>	<p>Cal TF staff releases TF RFQ and ensures timely selection of qualified technical experts. [June 2015]</p>	<p>Cal TF staff writes and releases RFQ for TF members. Cal TF staff manages RFQ process, including convening and supporting an applicant review subcommittee of the PAC.</p>	<p>PAC approves TF members selected for 2015-2016.</p>
<p>7. Develop 2016 Cal TF Work Plan</p>	<p>2016 Work Plan. [Draft: November 15, 2015; Final, December 10, 2015]</p>	<p>Cal TF staff solicits comments on Cal TF 2016 Work Plan from TF, PAC, ICC staff, others. Cal TF staff develops draft documents reflecting input. Cal TF staff develops final document reflecting TF and PAC feedback for PAC review and approval in the December 2015 PAC meeting.</p>	<p>PAC, TF, CPUC staff and others provide input on 2015 Cal TF Business Plan.</p>
<p>8. Cal TF - Second Year Review.</p>	<p>Cal TF achieves metrics in Cal TF 2015 Business Plan. Final report submitted to PAC [Second quarter, 2016]</p>	<p>Cal TF staff solicits feedback from PAC and TF on the value of Cal TF, areas for improvement. Second year report containing results compared to 2015 Business Plan metrics and holistic assessment submitted to the PAC.</p>	<p>Commission staff/consultants provide input on value of Cal TF, areas where Cal TF is not working well, suggestions for improvement.</p>