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.**	DEER Requirements Document (December 2015)	Cal TF staff work develop "DEER Requirements" document containing DEER requirements, measurements and assumptions for each measure currently active in DEER.	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 **Review and approve selected workpapers.**	At least twenty (20) workpapers for new or outdated statewide measures reviewed by Cal TF through consensus decision-making. (December 2015)	1. New/outdated measure recommendations solicited from TF Members, POUs, others. 2.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.	CPUC ex-ante team provides timely feed back on • Applicable DEER values, and • Any pre-existing work For all measure abstracts submitted. 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. Program Administrators may submit Approved Measures to the applicable decision-making entity (CPUC or POU Governing Boards).

3. **Develop policy positions.**	TF approves at least three (3) technical policy positions. (Completion dates: June 30, September 30, December 30, 2015)	The TF discusses policy solutions for issues selectedby PAC, to include capturing savings below code. The TF may also develop guidance documents that pertain to their technical work. 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. Cal TF staff posts approved technical policy positions on Cal TF website.	Resulting technical policy positions may be submitted to CPUC or other entities for approval by Program Administrators.
4. **Review and update POU Technical Reference Manual**.	TF reviews/updates at least eight (8) high priority measures/measure categories in POU TRM for technical accuracy and adequate documentation. [December 2015]	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.	POU PAC and TF members work with Cal TF staff to prioritize high priority measure categories for Cal TF review in 2015.
5. **Release RFQ for Technical Forum members to be seated June 1, 2005**	Cal TF staff releases TF RFQ and ensures timely selection of qualified technical experts.	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 approves TF members selected for 2015-2016.

	[June 2015]	PAC.	
6. **Develop 2016 Cal TF Work Plan and "Future Cal TF Vision" Document.**	"Future Cal TF Vision" [Draft: June 30, 2015; Final December 30, 2015] 2015 Work Plan. [Draft: November 15, 2015; Final, December 10, 2015]	Cal TF staff solicits comments and input to "Future Cal TF Vision" document and Cal TF 2015 Work Plan from TF, PAC, ICC staff, others. Cal TF staff develops draft documents reflecting input. Cal TF staff develops final documents reflecting TF and PAC feedback for PAC review and approval in the December 2015 PAC meeting.	PAC, TF, CPUC staff and others provide input on "Future Cal TF Vision" and 2015 Cal TF Business Plan.
7. **Cal TF - Second Year Review.**	Cal TF achieves metrics in Cal TF 2015 Business Plan. Final report submitted to PAC (Second quarter, 2016).	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.	Commission staff/consultants provide input on value of Cal TF, areas where Cal TF is not working well, suggestions for improvement.