



CALIFORNIA

TECHNICAL FORUM

Business Plan 2018

To support the growth and success of energy efficiency and integrated demand-side management (IDSMD) through a technically rigorous, independent, transparent peer review of California energy efficiency values and other related technical information.

Disclaimer: The Cal TF Policy Advisory Council's (PAC) approval of this work plan does not constitute endorsement of ensuing technical work products by individual members or organizations

2018 Business Plan			
Goal	Metrics	Tactics (Cal TF)	Tactics (Others)
<p>1. Seek PAC Consensus (to the extent possible) then Regulatory Review (if necessary for implementation) of draft Statewide New Measure Development and Review Process developed through the TF in 2017.</p>	<p>Provide PAC with draft Statewide New Measure Review Process and Comparison Exhibit of any TF non-consensus items.</p> <p>Form PAC subcommittee to review draft process and resolve non-consensus items.</p> <p>Prepare final New Measure Review Process with Comparison Exhibit based on PAC input for CPUC and CEC regulatory review and approval (if regulatory review needed for implementation).</p> <p>[Complete by Q2 pending PAC input]</p>	<p>Cal TF Staff presents draft process to PAC for initial review and comment.</p> <p>Cal TF Staff forms PAC subcommittee to review TF-developed Statewide New Measure Development and Review process and Comparison Exhibit of TF non-consensus items.</p> <p>Cal TF Staff solicits input on draft process from CPUC and CEC Staff.</p> <p>After PAC Subcommittee review, Cal TF Staff will bring to full PAC for review and affirmation. Any PAC non-consensus items will be memorialized in a Comparison Exhibit.</p> <p>Cal TF Staff will seek direction from full PAC on regulatory path for CPUC and CEC review and, if necessary for implementation, approval of the Statewide New Measure Review Process.</p>	<p>PAC members agree to join PAC subcommittee to review and, if needed, update draft Statewide New Measure Development and Review Process proposal and Comparison Exhibit developed by the TF.</p> <p>CPUC and CEC Staff provide input on draft process.</p> <p>After PAC subcommittee review, full PAC reviews/affirms (with updates, if necessary) draft Statewide New Measure Development and Review Process and Comparison Exhibit.</p> <p>PAC provides input on regulatory path for seeking CPUC approval of PAC-affirmed Statewide New Measure Development and Review Process.</p> <p>PAC forms subcommittee to guide process of seeking regulatory approval of process.</p> <p>PAC and TF Members work with Cal TF Staff to support regulatory approval of process (if needed for implementation).</p>

<p>2. Fulfill CPUC directives to Cal TF for Low-Income Measures (D.16-11-022, p. 398).</p>	<p>Collect savings values and other measure parameters used to calculate cost-effectiveness from the IOUs (SCE, SDG&E, PG&E and SCG) and POUs (SMUD/LADWP), and data that the IOUs and POUs are using to support those values.</p> <p>Collect and review all CA EM&V studies, including market assessment studies such as low income needs assessment study, in low-income programs from past five years from IOUs and POUs.</p> <p>Recommend additional data collection and EM&V studies, and modifications to EM&V studies, to strengthen savings values and other measure parameters for measures provided to low-income customers.</p> <p>[Ongoing through 2018]</p>	<p>Explore methods for specifying savings values per CPUC Decision 16-11-022: “We direct the IOUs to coordinate with the California Technical forum to recommend prospective savings values and revisions to its EM&V methodologies...” (p. 398):</p> <ul style="list-style-type: none"> • Create low-income subcommittee. • Gather savings values and other measure parameters used to calculate cost effectiveness. • Gather existing support information for measures/measure parameters. <p>Explore methods for addressing EM&V issues:</p> <ul style="list-style-type: none"> • Collect all California EM&V and market studies from the past five (5) years – finalized and in-progress. • Review low-income EM&V methods, data needs, and data gaps. • Review with low-income subcommittee and recommend modifications to EM&V studies and gaps that need to be filled. 	<p>IOUs and POUs provide to Cal TF Staff list of existing measures used in low-income programs, associated savings values and other measure parameters and all data used to support the values.</p> <p>IOUs and POUs provide to Cal TF Staff any EM&V and market studies completed or in-progress over the past five years and any program data collection in past five years (completed or in-progress), both process or impact.</p> <p>Cal TF members review low income subcommittee data and EM&V studies to help identify data collection gaps and additional EM&V studies, plus changes to low-income EM&V methodologies.</p>
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<p>3. Facilitate Statewide Coordination of IOU and POU Measure Updates, Revisions and Additions.</p>	<p>Coordinate monthly review and updates to statewide measure list.</p> <p>Post updated list on Cal TF website monthly.</p> <p>[Ongoing]</p>	<p>Statewide measure list to be circulated monthly for new measure additions and measure updates.</p> <p>Bi-weekly or monthly teleconferences to review new and updated measures and to coordinate to ensure measure development meets statewide needs (IOU POU and implementer).</p>	<p>IOU and POU workpaper coordinators:</p> <ul style="list-style-type: none"> • Gather feedback from their workpaper developers and update the report monthly per the schedule • Inform Cal TF staff and other IOU and POU counterparts of measures under consideration, in development, and retired, and status of measures in development during monthly meetings. <p>Workpapers leads ensure that high quality workpapers that are developed are statewide and include input from counterparts at other IOUs and POUs.</p> <p>PAs agree to use common measure development guidelines and QA/QC procedure so uniform product is submitted to CPUC and/or Cal TF.</p>
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<p>4. Administer Electronic TRM (eTRM) Development.</p>	<p>Administer development of eTRM.</p> <p>[Ongoing through 2018]</p>	<p>Administer eTRM development to achieve following milestones:</p> <p>eTRM Phase 1 Development complete that conforms to all Phase 1 business requirements and technical requirements (no later than seven (7) months after eTRM contract execution).</p> <p>First 75 Measures entered into eTRM (seven (7) months after eTRM contract execution).</p> <p>eTRM testing and acceptance for Phase 1 (eight (8) months after eTRM contract execution).</p> <p>eTRM Phase 2 development that meets all Phase 2 testing and acceptance (ten (10) months after eTRM contract execution).</p> <p>eTRM testing and acceptance for Phase 2 (eleven (11) months after eTRM contract execution).</p> <p>eTRM training: three (3) in Northern California, three (3) in Southern California (twelve (12) months after eTRM contract execution).</p> <p>Documentation (Draft for Comment):</p> <ol style="list-style-type: none"> 1. Data Dictionary – three (3) months after eTRM contract execution. 2. User Guide – seven (7) months after eTRM contract execution. 3. System Administrator Guide – ten (10) months after eTRM contract execution. 	<p>IOU, POU, CPUC and CEC Staff engage in eTRM development process to ensure resulting system, documentation, and training meet each organization's needs:</p> <ol style="list-style-type: none"> 1. Participate in weekly project oversight meetings; 2. Provide staff to test features after each three (3) week "sprint"; 3. Provide review and comment on all documentation/training material within ten (10) business days; 4. Provide staff (technical, reporting, IT) during Phase 1 and Phase 2 testing and acceptance periods to ensure features work as expected.
<p>5. Complete Measure Consolidation</p>	<p>Consolidate remaining measures (not-to-exceed 150, for a total of 225</p>	<p>Q1: 15 measures consolidated Q2: 25 measures consolidated Q3: 55 measures consolidated</p>	<p>CPUC and CEC Staff work with Cal TF Staff to finalize eTRM Data Specification and accompanying Data Dictionary to ensure that</p>

	<p>measures) into the eTRM Data Specification.</p> <p>[Complete by December 2018]</p>	<p>Q4: up to 55 measures consolidated</p>	<p>all data that IOUs/POUs and 3-P (implementers) are asked to collect and report to regulators is used, useful, standardized, consistent and clear. To extent possible, data requirements and definitions shall be aligned with the federal Building Energy Data Exchange Specification (BEDES) data standardization initiative.</p> <p>CPUC Staff provide definitions for all existing required data fields, allowable values, and how data is currently being used by CPUC for program tracking, claims (CEDARs), reporting (such as EESat) and/or for cost-effectiveness analysis (CEV).</p> <p>CPUC Staff provides support and documentation for DEER values, assumptions, etc. so that sources can be linked to values in eTRM, and to achieve Commission objective of “transparency” and “well-documented” for all DEER values and data.</p> <p>IOUs, POUs, and Cal TF members participate in technology-specific subcommittees, review support for measures, suggest additional studies/data needed, recommend how measures should be consolidated, and gain internal organization consensus for consolidated measures.</p> <p>IOU representatives provide any additional CPUC data and text required by the CPUC Staff to upload consolidated measures into WPA, upload consolidated measures to</p>
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			WPA, and include all IOU and POU representatives and Cal TF Staff in any CPUC Staff discussions or communications about the consolidated measures.
6. Develop and Execute Path for Regulatory Approval of the eTRM.	<p>Develop regulatory path for seeking CPUC approval of the eTRM (Q1 2018).</p> <p>Work with PAC and TF members to execute regulatory path for approval of the eTRM. [Ongoing through 2018]</p>	<p>Cal TF Staff discusses with PAC options for seeking CPUC regulatory approval of the eTRM.</p> <p>Cal TF Staff works with TF and PAC members, under the direction of a PAC subcommittee, to seek regulatory approval of the eTRM.</p>	<p>PAC provides input on regulatory path for seeking CPUC approval of eTRM.</p> <p>PAC forms subcommittee to guide process of seeking regulatory approval of eTRM.</p> <p>PAC and TF Members work with Cal TF Staff to support CPUC regulatory approval of eTRM.</p>
7. Develop Crosscutting Technical Positions Papers related to Business Plan Objectives.	<p>TF develops and approves at least one (1) crosscutting Technical Position Paper.</p> <p>[By December 2018]</p>	<p>TPPs for consideration include:</p> <ul style="list-style-type: none"> • Path to approval for Open Studio/EnergyPlus (for C&I Measures), including plan and process for developing Analysis Controller. • Review approaches in California for modeling residential measures and residential whole building modeling; recommendations on moving to consistent statewide approach. • Process for validating new modeled measures. • Collect and review recent analyses, studies, reports and recommendations applicable to California on approaches to using metered savings in lieu of deemed savings for measure savings; identify which currently deemed measures are candidates for using metered data instead of deemed values for savings determinations. 	<p>TF Subcommittee contributes to TPP development; full TF reviews and affirms.</p> <p>PAC subcommittee reviews policy elements of TPPs; full PAC reviews and affirms policy elements.</p> <p>CPUC and CEC Staff provide review and comment of technical position papers.</p> <p>If PAC so directs, PAC subcommittee guides regulatory approval by CPUC and/or CEC.</p>

		<ul style="list-style-type: none"> • Systematic and transparent process for ensuring results of EM&V and market studies are used to update deemed measures; systematic and transparent process for identifying and communicating to EM&V roadmap new study/data requirements needed to update deemed measures. <p>Cal TF Staff supports crosscutting discussions through research on technical policy issues, producing draft position papers for Cal TF review/comment, and soliciting Cal TF comments and approval.</p> <p>Cal TF Staff also solicits CPUC staff and CEC input and feedback on technical position papers.</p> <p>Cal TF Staff presents TPPs to PAC. If TPPs include policy issues, seek PAC input, consensus and affirmation of policy elements of TPP.</p> <p>Cal TF Staff posts approved technical positions on Cal TF website.</p> <p>If PAC so directs and under PAC direction, seek regulatory (CPUC and CEC) approval of one or more TPPs.</p>	
8. Update the Cal TF Operations Manual ; Develop Cal TF Charter .	<p>Operations Manual Updated and Cal TF Charter Created.</p> <p>[Complete in Q1]</p>	<p>Cal TF Staff updates Cal TF Operations Manual; drafts proposed Cal TF Charter.</p> <p>Cal TF Staff forms PAC subcommittee to review/address non-consensus items.</p> <p>PAC discusses next steps.</p>	<p>CPUC Staff and CEC provide review and comment of revised Operations Manual and Cal TF Charter.</p> <p>PAC reviews, comments, affirms updated revised Operations Manual and Cal TF Charter.</p>

9. Release RFQ for Technical Forum Members (if needed).	<p>Cal TF Staff releases TF Member RFQ and ensures timely selection of qualified technical experts.</p> <p>[As required]</p>	<p>Cal TF Staff determines by how many current TF members will continue participation for eTRM project (through December 2018).</p> <p>Cal TF staff manages RFQ process, including convening and supporting an applicant review process through a TF subcommittee.</p>	<p>Select TF Members join subcommittee to review responses to RFQ for new Members; recommend to PAC selected new members.</p> <p>PAC affirms new TF members.</p>
10. Develop 2019 Cal TF Business Plan .	<p>2019 Business Plan.</p> <p>[Draft: October 15, 2018; Final: December 2018 PAC Meeting]</p>	<p>Cal TF staff solicits comments on Cal TF 2018 Work Plan from TF, PAC, CPUC and CEC staff, and other stakeholders.</p> <p>Cal TF staff updates draft document reflecting input.</p> <p>Cal TF staff develops final document reflecting input for PAC review and approval in the December 2018 PAC meeting.</p>	<p>PAC, TF, CPUC staff and others provide input on 2019 Cal TF Business Plan.</p> <p>PAC affirms Business Plan by December 2018.</p>