



eTRM Update: Path to the New California Database of Record

The California Technical Forum (Cal TF) is in the process of building an electronic Technical Reference Manual, known as the eTRM. The eTRM is an online relational database that will be a repository for all statewide deemed measures.

This update outlines just some of the numerous benefits the eTRM will bring to California's energy efficiency industry. The new state-of-the art, best-in-class eTRM platform will be essential to streamlining and ensuring the transparency of the ex ante measure process, implementation, and reporting workflow. Moreover, the eTRM supports the policy goals of the new California implementation framework where third-party implementation contractors are expected to design and implement 60% of the portfolio by 2020.¹

Single Repository of Statewide-Consistent, Standardized Deemed Measures. By the end of 2018, the eTRM will be populated with approximately 175 statewide-consistent, standardized deemed measures offered by the IOUs and POUs.² These measures accounted for about 61% of the electric savings and 36% of the gas savings of the California investor-owned energy efficiency portfolio administered in 2016.³ Unlike the utility-specific workpapers for deemed measures that are not generally consistent or standardized (either with respect to each other or the POU TRM), these statewide deemed measures have consistent units of measure; baseline definitions; calculation methods, inputs and assumptions; and cost analysis methods; among many other attributes. Importantly, the deemed measure consolidation process expanded this suite of deemed measures to make them applicable throughout the entire State of California and available in all climate zones, regardless of whether they are offered by all or just a portion of the utilities. This will allow third-party implementers to effectively design and implement statewide programs.

In a Motion to be filed later this year, the Cal TF will be seeking approval from the CPUC to adopt the eTRM as the "database of record" and to approve all statewide consolidated measures.

The change is supported by the Cal TF Policy Advisory Committee (PAC), which is comprised of leaders from all key energy efficiency stakeholders in California.

The support of program administrators, implementation contractors, M&V and evaluation firms, and other key stakeholders will be essential for success.

User-Friendly Database of Deemed Measures. The eTRM has a user-friendly interface that is easy to navigate. Each measure is fully described in non-technical terms with clear descriptions of the base and measure case scenarios, code requirements, program requirements, energy and demand impact calculations, and other relevant information. Each eTRM measure is fully documented in a single entry that contains energy and demand impact values and all associated measure data, EUL, NTG, installation rate, measure costs, etc.; users will not need to search in separate tables or databases to locate all relevant information related to a deemed measure as is currently the case.

Transparent and Well-Documented. Transparency and readily-accessible documentation are core principles for eTRM design and development. All parameters, assumptions, and supporting documentation are fully cited and the publicly available references and source materials for each measure will be contained in the eTRM

¹ D. 16-08-019, p. 74

² The final number measures that will be consolidated and transferred to the eTRM is subject to change and depends upon the measures that the IOUs and POUs will continue to offer in 2019.

³ Cal TF Staff was not able to locate similar data for POUs.

reference library and linked to the values and parameters they support. Currently, there is no reference library for deemed measures. References are scattered throughout multiple databases and documents and are not linked to the values or parameters they support. The clear and concise explanations of the impact and cost analysis methods and the availability of supporting documentation render eTRM measures transparent and the impacts reproducible. Finally, the process for consolidating the utility workpapers and POU TRM into single statewide consistent measures through the TF has been public and transparent.

Streamlined Work Flow for Deemed Measure Development, Review, Approval, Implementation, and

Updating. The eTRM workflow management functions will simplify and streamline the process of developing, reviewing, approving (Cal TF and CPUC Staff), updating, and implementing measures. The benefits will flow to all energy efficiency stakeholders who need to work with or implement deemed measures in California. The Commission's ex ante review consultants will realize workflow efficiencies because they only need to review a single unified measure in the eTRM instead of multiple utility-specific workpapers, as is the case now. The eTRM will automatically publish/update measures once approval is registered within the system. The eTRM reporting capabilities and APIs⁴ will significantly streamline program planning as well as regulatory compliance reporting required of the IOU portfolio administrators. Implementers will have ready access to a single set of statewide deemed measures that are clear, understandable, reproducible, and well-documented.

Well-aligned with Regulatory Objectives. Several CPUC decisions call for statewide consistent measures and an ex ante process that is transparent, collaborative, and well documented.⁵ The most recent (but not the only) direct regulatory support is contained in the Phase 2A decision in the Rolling Portfolio proceeding (R.13-11-005):

We direct the PAs to work with stakeholders to jointly investigate and propose potential solution to Commission Staff to improve the usability and transparency of all ex ante values. The solutions may include new software tools that offer a common platform for all PAs to compose savings estimates transparently and consistent with Commission direction. Proposals should be focused on opportunities to facilitate transparency and collaboration. (D. 15-10-028, pp. 97 – 98.)

The Path Forward

The remainder of 2018 will be a critical path to succeed with this important project that will benefit all energy efficiency stakeholders and ultimately California's ratepayers. The path forward is comprised of three main initiatives:

Regulatory Approval. The Cal TF will file a Motion seeking approval to consider issues in Phase 3 of the Rolling Portfolio Proceeding. This motion will include a substantive request to consider whether the eTRM should be the "database of record" for deemed measures and to approve the eTRM data specification.

eTRM Development. The eTRM software platform development is well underway. In June 2018, the Phase 1 Testing and Acceptance will be based upon the first 75 measures consolidated in 2017. Phase 2 Testing and Acceptance will be conducted in October, and all consolidated statewide measures will be uploaded by the end of 2018. An eTRM demo will be conducted in a Cal TF meeting this summer, and a full schedule of demos, training, and information sessions will be published in the months to come.

Measure Consolidation. Measure consolidation began in Q3 2017 and is well underway; Cal TF Staff are on track to consolidate all identified measures by the end of Q3 2017. Measures will be submitted in groups for Commission Staff approval beginning in September 2018.

⁴ APIs, or application programming interfaces, are customized portals that will enable the portfolio administrators and implementers to pull data directly from the eTRM data tables into their unique data systems.

⁵ D. 15-10-028, pp. 97 – 98.