



CALIFORNIA

TECHNICAL FORUM

Business Plan **2018** **Draft**

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.

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)
1. Seek Consensus, (to the Extent Possible), then Regulatory Review of Statewide New Measure Development and Review Process .	<p>Finalize input from TF members on draft Statewide New Measure Review Process (TPP 8) including areas of non-consensus, rational for non-consensus items and alternative approaches (Q1).</p> <p>Solicit input from PAC on next steps for Statewide New Measure Review Process, including formation of PAC subcommittee to try to resolve non-consensus items.</p> <p>Prepare final New Measure Review Process with Comparison Exhibit. Solicit PAC input on next steps.</p>	<p>Cal TF Staff seeks to identify and memorialize all non-consensus items identified by Cal TF members, plus rationale for non-consensus and alternative approaches. Cal TF Staff will then create a "Comparison Exhibit" identifying non-consensus items, rationale and alternatives. TF members who have identified non-consensus items will be given the opportunity to review alternate language to ensure it accurately captures non-consensus issues and alternatives.</p> <p>Cal TF Staff will form PAC subcommittee to discuss, resolve to extent possible non-consensus items, which will be brought to full PAC for review and comment. Any remaining non-consensus items will be memorialized in Comparison Exhibit.</p>	<p>Cal TF members provide input on non-consensus items, rationale and alternatives.</p> <p>PAC members agree to form subcommittee to seek to resolve non-consensus items.</p> <p>PAC members agree to review Comparison Exhibit and reach agreement on next steps to seek regulatory review/approval of New Measure Review process.</p>
2. Fulfill CPUC directives to Cal TF for Low-	Recommend savings values for low-income measures.	Gather savings values and other measure parameters used to calculate C/E for low-income measures from IOUs and POUs.	

<p>Income Measures (D.16-11-022, p. 398).</p>	<p>Recommend modifications to EM&V methodologies.</p>	<p>Gather all support information for low-income measures/measure parameters.</p> <p>Collect all CA EM&V studies from past three (3) years – finalized and in-progress. Review methods, needs and gaps; review with low-income subcommittee and recommend changes to studies and gaps that need to be filled.</p> <p>Create low-income subcommittee, review current values and support; recommend consolidated values and areas for updating.</p> <p>Place in eTRM Data Specification and seek Cal TF affirmation.</p>	
<p>3. Facilitate Statewide Coordination of IOU Workpapers and POU Measure Revisions and Additions.</p>	<p>Coordinate monthly review and updates to SW Measure List (ongoing).</p>	<p>SW 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.</p>	<p>IOU and POU workpaper coordinators inform Cal TF staff and other IOU counterparts of measures under consideration, in development, and retired, and status of measures in development during monthly meetings.</p> <p>Workpapers leads ensure 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>

4.Administer Electronic TRM (eTRM) Development.	Administer development of eTRM (ongoing through 2018).	<p>Administer eTRM development to achieve following milestones:</p> <p>eTRM Phase 1 Development complete that conforms to all Phase 1 BR and TR (no later than seven (7) months after contract execution).</p> <p>First 75 Measures entered into eTRM (7 months after contract execution).</p> <p>eTRM testing and acceptance for Phase 1 (8 months after contract execution).</p> <p>eTRM Phase 2 development that meets all Phase 2 testing and acceptance (10 months after testing and acceptance).</p> <p>eTRM testing and acceptance for Phase 2 (11 months after contract execution).</p> <p>eTRM training-3 in Northern California, 3 in Southern California (12 months after contract execution).</p> <p>Documentation (Draft for Comment):</p> <ol style="list-style-type: none"> 1. Data dictionary – 3 months after contract execution 2. User Guide – 7 months after contract execution 3. System Administrator Guide – 10 months after 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.
5. Complete Measure Consolidation	Consolidate Remaining measures (not-to-exceed 150, for a total of 225 Measures) (Complete by December 2018).	<p>Q1: 32 Measures consolidated Q2: 32 measures consolidated Q3: 43 Measures consolidated Q4: 43 Measures consolidated</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.

<p>6. Develop Regulatory Path for “Stage 2” Review of Proposed Measure Modifications.</p>	<p>Develop regulatory path for seeking approval of updated measures (new data/improved data (Stage 2 Issues) for review by Cal TF, PAC and CPUC Staff (Q1).</p> <p>Seek direction from PAC on next steps.</p>	<p>Cal TF Staff tracks measures that Cal TF recommends be updated.</p> <p>Cal TF staff develops regulatory path for updating; solicits Cal TF and CPUC Staff input.</p> <p>Cal TF Staff seeks PAC review/subcommittee formation (if needed) to address differences, then PAC affirmation to proceed.</p>	<p>Cal TF, PAC and CPUC staff provide input on regulatory path and process.</p> <p>PAC affirms approach to proceed with seeking regulatory approval of new/updated measures.</p>
<p>7. Develop Crosscutting Technical positions papers related to Business Plan Objectives.</p>	<p>TF develops and approves at least one (1) crosscutting Technical Position Paper.</p> <p>[December 2018]</p>	<p>TPPs for consideration include:</p> <ul style="list-style-type: none"> -Path to approval for Open Studio/EnergyPlus, including plan and process for developing Analysis Controller that can work with multiple modeling tools; -Opportunities for Leveraging eTRM/Cal TF; -Process for validating new modeled measures; and -Overview of approach to using metered savings to determine savings. <p>Cal TF Staff supports crosscutting 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 also solicits CPUC staff input and feedback on technical position paper.</p> <p>Cal TF Staff posts approved technical positions on Cal TF website.</p>	<p>CPUC ex ante team and other entities (such as the CEC) provide review and comment of technical position papers.</p> <p>Reviewers provide responses to comments within ten (10) business days.</p>
<p>8. Update Cal TF Operations Manual; Develop Cal TF Charter.</p>	<p>Operations Manual Updated; Cal TF Charter Created (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>PAC reviews, comments, affirms updated Operations Manual and Cal TF Charter.</p>

9. Release RFQ for Technical Forum members to be seated for eTRM work (if needed).	Cal TF staff releases TF Member RFQ and ensures timely selection of qualified technical experts.	<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 subcommittee of the PAC.</p>	PAC approves TF members selected for eTRM project
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 members provide responses to comments within ten (10) business days.</p> <p>PAC approves Business Plan by December 2018.</p>