



CALIFORNIA

TECHNICAL FORUM

Business Plan 2019

To support the growth and success of energy efficiency and integrated demand-side management (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

2019 Business Plan

Goal	Metrics	Tactics (Cal TF)	Tactics (Others)
<p>1. Complete eTRM Deemed Measure Upload [August 1, 2019] Statewide deemed measures uploaded into eTRM [and approved by ex ante review team] ¹</p>	<p><u>Measures Uploaded and Approved by August 1, 2019:</u> Upload consolidated measures to the eTRM and complete QA/QC.</p> <p>Total = Approximately 143 Measures</p>	<p>Cal TF Staff will prepare consolidated measures for submission and deliver to IOU staff for upload to the CPUC's Workpaper Archive (WPA). The Cal TF Staff will:</p> <ul style="list-style-type: none"> • Complete savings comparison and CET analysis, as needed • Work with IOU Staff to integrate DEER 2019 and 2020 updates • Maintain harmonization for changing measures • Address Stage 1 issues • Categorize Stage 2 issues • Complete reference reviews • Address utility and Cal TF comments • Conduct final QC of submission packet <p>Cal TF Staff will publish statewide approved consolidated measures. To complete the measure upload of 2018 measures to eTRM, Cal TF Staff will:</p> <ul style="list-style-type: none"> • Upload data and text files • Upload reference library and link references to values they support • Conduct quality control to ensure accuracy of the uploaded measure <ul style="list-style-type: none"> ○ Confirm that the savings and cost inputs match ○ Confirm that the calculations are correct 	<p>The IOUs will:</p> <ul style="list-style-type: none"> • Update the consolidated measures for the DEER 2019 and 2020 updates • Work with Cal TF Staff to integrate 2019 and 2020 DEER updates. Any new modeling or significant measure alterations due to DEER updates are the responsibility of IOU Staff • Review and comment on each consolidated measure • Create the four ex ante tables needed to submit measures to the CPUC <p>CPUC will deliver the 2018 savings claims data for savings comparison on measures still requiring this analysis.</p> <p>The Ex Ante review team will review and approve all statewide consolidated measures by August 1, 2019.</p>

¹ NOTE: Cal TF Staff cannot control EAR Team approval schedule for statewide measures, but we will work with the utilities and CPUC Staff and consultants to achieve this collectively-established goal.

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		<ul style="list-style-type: none"> Validate the outputs (particularly the measure permutations created by the eTRM) 	
<p>2. Develop Stage 2 Issue Roadmap Prepare a roadmap for pursuing resolution of Stage 2 issues identified through the measure consolidation process</p>	<p><u>Stage 2 Roadmap Completed</u></p> <ul style="list-style-type: none"> Draft by January 31, 2019 Final by end of Q1 2019 <p><u>Cal TF Completes Recommendations on Twelve (12) Stage II Issues:</u> Cal TF develops proposed recommended solutions for at least 12 Stage II issues by end-of-year (Note: Current Stage II issue list contains 147 items. This list is updated regularly.)</p>	<p>Cal TF Staff will develop a roadmap for addressing the Stage 2 issues identified through the 2017 and 2018 measure consolidation process – with input from IOUs, POU, CPUC Staff and EAR Consultants and CEC Staff. Roadmap development will involve the following:</p> <ul style="list-style-type: none"> Refine and prioritize the Stage 2 issues Identify subset of issues for Cal TF to pursue in 2019 Identify subset of issues that others would like to pursue in 2019, and track progress of issue resolution that for which others assume lead responsibility Form subcommittees and/or prepare Technical Position Paper(s) or position statements for Cal TF-led issues Cal TF-led Stage 2 issue count may include items listed on this business plan. <p>Cal TF Staff will present a Stage 2 Roadmap for review and comment to:</p> <ul style="list-style-type: none"> IOUs & POU CPUC ED & EAR team CEC CEDMC and NAESCO Cal TF PAC 	<p>The following entities provide timely input on Stage 2 Roadmap, particularly how to prioritize issues and whether they would like to lead development and resolution of issue:</p> <ul style="list-style-type: none"> IOUs & POU CPUC ED & EAR team CEC CEDMC and NAESCO Cal TF PAC <p>For Cal TF-led Stage 2 issues, Cal TF members, on case-by-case basis, take leadership roles in researching and addressing specific Stage 2 issues for which they have expertise; either individually or by leading a subcommittee.</p> <p>CPUC Staff and Ex Ante Review Team will review and comment on the list of 2019 Stage 2 issues to address.</p> <p>CEC will identify which issues they are working on or plan to address in 2019 and identify any possible areas of overlap or duplication.</p>

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		<p>Cal TF Staff will take lead in tracking progress on issue development and resolution.</p> <p>Cal TF Staff will update and categorize “Stage II” issue list.</p>	
<p>3. Manage the eTRM</p>	<p><u>Complete 2019 eTRM Training Objectives</u></p> <ul style="list-style-type: none"> • Two trainings for IOU and POU staff completed as agreed upon with the IOUs/POUs • Conduct tailored training sessions as requested by CPUC ED and CEC staff • Administer feedback questionnaire to trainees within one (1) month of each training • Prepare a summary of the results within one (1) month of each questionnaire <p><u>eTRM Enhancements Identified and Prioritized and categorized into “Phase 3” and “Phase 4”</u></p>	<p>Cal TF Staff will support industry training on the eTRM through the following activities:</p> <ul style="list-style-type: none"> • Coordinate with the IOUs and POUs to determine their training needs and timing • Manage SBW’s development of training materials • Oversee SBW execution of the training • Evaluate the training activities by developing and administering an online questionnaire to all trainees and preparing a training evaluation summary memorandum. <p>Cal TF Staff will identify Phase 3 and 4 enhancements to the eTRM through the following activities:</p> <ul style="list-style-type: none"> • Develop a preliminary list of additional eTRM enhancements. This list shall include EAR Workflow, 	<p>SBW will execute all aspects of the eTRM training, including:</p> <ul style="list-style-type: none"> • Develop training materials. • Establish neutral dates that work for CPUC and industry. • Secure training venues that are appropriate to the training format (i.e. online versus class room). • Publicize the trainings to the appropriate industry market actors. • Manage registration process and other logistics, such as participant inquiries. • Conduct the trainings. <p>Cal TF members and “core” eTRM organizations will provide ideas for and input on Phase 3 & 4 enhancements.</p>

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	<ul style="list-style-type: none"> End of Q1 2019 <p><u>Stakeholder Feedback on eTRM Solicited/Documented:</u> In consultation with CPUC Staff, conduct broader stakeholder demonstrations of eTRM and solicit input and feedback on value of eTRM</p> <p><u>Administer eTRM</u></p> <ul style="list-style-type: none"> Ongoing 	<p>redlining, roles and permissions, integrating with CET and CEDARs</p> <ul style="list-style-type: none"> Circulate to Cal TF, IOUs/POUs and CPUC/CEC for input and additional items Establish priorities/scenarios. Estimate funding requirements for different scenarios Solicit funding from funders for enhancements that they approve <p>Cal TF will work with CPUC Staff to solicit and document feedback from potential California eTRM users (stakeholders) on value and potential use of eTRM</p> <p>Cal TF Staff will administer the eTRM through the following activities:</p> <ul style="list-style-type: none"> Manage user roles and permissions Develop guidelines, processes and requirements for various functions, as required Monitor and responding to user inquiries Monitor system performance and resolve issues 	<p>CPUC Staff will provide Cal TF Staff with input on who they would like to get feedback from and how they would like the feedback to be collected and documented.</p> <p>The eTRM web developer will complete bug fixes or required updates.</p>

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<p>4. Develop eTRM Transition/Leveraging Plan</p>	<p><u>eTRM Work Plan Updated and Finalized</u></p> <ul style="list-style-type: none"> End of Q2 2019 <p><u>eTRM Transition/Leveraging Plan ver. 1.0 Developed</u></p> <ul style="list-style-type: none"> End of Q3 2019 	<p>Cal TF Staff will solicit input from multiple organizations and prepare a transition plan that will 1) describe steps and timing for impacted organizations to be able to use the eTRM; 2) address whether regulatory approval is necessary for leveraging the eTRM as the industry repository for CPUC-approved deemed measures; 3) describe how eTRM can be used, leveraged or provide value to other California initiatives.</p> <p>Cal TF Staff will work with the CPUC ED Staff and Cal TF PAC to identify the path to eTRM adoption.</p>	<p>The following organizations shall meet with Cal TF staff to identify opportunities for transitioning to and leveraging the eTRM:</p> <ul style="list-style-type: none"> CPUC CEC CEDMC CAEECC NRDC IOUs POUs RENs
<p>5. Advance Statewide Consistent Approach to Energy Modeling</p>	<p><u>Develop High-Level Proposed Approach for Achieving Consistent Statewide Approach to Building Simulation Modeling:</u> Convene Cal TF and consult with knowledgeable CA stakeholders to develop Cal TF Technical Position Paper on achieving statewide approach to building simulation modeling.</p> <ul style="list-style-type: none"> End of Q4 2019 	<p>Cal TF Staff will continue to participate in CEC-led compliance software workshops to understand needs of California’s code compliance community and direction of code compliance software in California (i.e., which tools will be used).</p> <p>Cal TF Staff will consult with CA modeling experts (such as CEC, LBNL, EM&V consultants, independent contractors) on key needs and principles for a CA modeling framework.</p> <p>Cal TF Staff will host “Charette” to develop a high-level framework on consistent energy simulation modeling approaches between California’s code compliance, deemed savings calculations, and custom calculations.</p>	<p>CA industry professionals who use building simulation models will participate in meetings and will provide input to identify common goals and propose approaches to harmonizing modeling to:</p> <ul style="list-style-type: none"> Reduce inefficiencies Maintain or improve modeling rigor Identify what constitutes sufficient evidence such that results of a new model are reliable for savings calculations Achieve consistent documentation so results are transparent and can be reproduced and peer reviewed.

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	<p><u>Guidelines on When to Model Measures:</u> Create guidelines on the appropriate use of simulation modeling for measure savings versus other approaches such as meter-based savings or engineering calculations.</p> <ul style="list-style-type: none"> • End of Q2 2019 	<p>Cal TF Staff will work with Cal TF subcommittee to assess value of simulation versus engineering equations within context of:</p> <ul style="list-style-type: none"> • Accuracy of savings estimates, • Ease of use • Savings calibration with EM&V findings. <p>Cal TF Staff will work with Cal TF subcommittee to identify and categorize measures based on appropriate estimation approach:</p> <ul style="list-style-type: none"> • Engineering equations, • Simulation Modeling, • Hybrid (Simulation Modeling to determine key parameters for use in subsequent engineering equations). <p>Cal TF Staff will provide input on modeling features that could benefit the eTRM to meet current needs and future needs such as:</p> <ul style="list-style-type: none"> • Analysis controller-type features, • Geotargeting, • Sensitivity analyses. 	
<p>6. Conduct Research to Integrate Cal TF/eTRM with EM&V Planning Processes</p>	<p><u>eTRM - EM&V Integration Research</u></p> <ul style="list-style-type: none"> • End of Q4 2019 	<p>Cal TF Staff will conduct research to develop data needs and a process through which the eTRM will “feed” data into EM&V planning and also such that statewide deemed measures can be informed by EM&V results.</p> <p>In 2019, Cal TF Staff will undertake the following:</p>	<p>CPUC Staff and their EM&V (EAR Team) Consultants will provide input on recommendations on how to better integrate EM&V into deemed savings development and updating.</p> <p>CPUC Staff and EAR Team will advise and guide embedded EM&V at the measure level.</p>

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		<ul style="list-style-type: none"> Coordinate with the CPUC and/or its consultants to identify data needs and a process through which data from eTRM can be incorporated EM&V planning. The process shall: <ul style="list-style-type: none"> Identify data/information needs, format, and level of specificity Consult with the EAR Team and Cal TF to identify an approach to “embedded EM&V” and start to identify what the embedded EM&V should include at a measure level. 	
<p>7. Manage Statewide Deemed Measure List:</p> <p>Facilitate Statewide coordination of IOU workpapers and POU measure revisions and additions.</p>	<p><u>Statewide Deemed Measure Updated and Posted Monthly</u></p> <ul style="list-style-type: none"> Ongoing 	<p>Statewide Measure list will be circulated monthly to IOUs and POU for new measure additions and measure updates.</p> <p>Monthly teleconferences with designated IOU and POU leads to review new and updated measures and to coordinate to ensure all parties are aware of changes/additions and measure development meets statewide needs.</p>	<p>During monthly meetings, the IOU and POU workpaper coordinators will inform Cal TF staff and their IOU counterparts of measures under consideration, in development, and retired; as well as the status of measures in development.</p> <p>Workpapers leads will ensure workpapers that are developed are statewide and include input from counterparts at other IOUs and POU.</p> <p>PAs agree to use common measure development guidelines and QA/QC procedures so uniform product is submitted to CPUC and/or Cal TF.</p>
<p>8. Manage the Cal TF and Cal TF PAC</p>	<p><u>Ten (10) TF Meetings Held</u> and additional subcommittee meetings, as required.</p>	<p>To manage the TF, Cal TF Staff will:</p> <ul style="list-style-type: none"> Prepare a calendar of TF meetings and locations Secure meeting locations and arrange other logistics Prepare and post meeting agendas and materials 	<p>Cal TF and PAC members will attend meetings.</p> <p>Cal TF and PAC members will prepare for meetings by reviewing materials in advance.</p>

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	<p><u>Four 4 PAC Meetings or Teleconferences Held</u></p> <p><u>RFQ Conducted for new members</u></p> <ul style="list-style-type: none"> Q1 or Q2 2019 <p><u>Cal TF Website/Materials Maintained and Updated:</u> Maintain Cal TF website and update Cal TF process documents, such as Operations Manual, to reflect current Cal TF practices.</p>	<ul style="list-style-type: none"> manage TF meetings Prepare and post meeting notes <p>To manage the Cal TF PAC, Cal TF Staff will:</p> <ul style="list-style-type: none"> Schedule PAC meetings approximately quarterly, based on policy needs and activity. Prepare meeting agendas and materials Manages meetings Prepare and circulate meeting notes <p>Cal TF Staff will maintain current data and information (including Cal TF process documents) on the Cal TF website.</p>	
<p>9. Develop the 2020 Cal TF Business Plan</p>	<p><u>Cal TF 2020 Business Plan Developed</u></p> <ul style="list-style-type: none"> Draft by October 15, 2019 Final by the December 2019 PAC Meeting 	<p>Cal TF Staff will solicit comments on Cal TF 2019 Work Plan from TF, PAC, CPUC and CEC staff, and other stakeholders.</p> <p>Cal TF Staff will update the draft plan to reflect the stakeholder input.</p> <p>Cal TF Staff will develop a final Business Plan reflecting input for PAC review and approval in the December 2019 PAC meeting.</p>	<p>PAC, TF, CPUC Staff, and others will provide input on 2020 Cal TF Business Plan.</p> <p>PAC will affirm the Business Plan by December 2019.</p>
<p>10. Fulfill CPUC directives to Cal TF for Low-income measures (D. 16-11-022, p. 398)</p>	<p><u>Develop Low-income Technical Position Paper</u> that outlines the Cal TF recommendation for revisions to low income</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</p>	<p>IOUs and POU 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>

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	<p>savings values and any necessary revisions to EM&V methodologies.</p> <ul style="list-style-type: none"> • Convene subcommittee in April, 2019 • Draft TPP by August 2019 	<p>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 POU 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>