

# 2017 Business Plan: Q1 Progress Report



**ANNETTE BEITEL**  
**APRIL 2017**

# 2017 Business Plan Overview



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1. Review and approve selected measures
2. Facilitate statewide coordination of IOU workpapers
3. Implement “Best-in-Class” eTRM
4. Develop Technical Position Paper(s) related to eTRM (at least 1)
5. Release RFQ for TF members
6. Develop 2018 Cal TF Work Plan
  - ❑ Later in year

# Goal 1. Review and Approve Selected Measures

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## 2017 Cal TF Measures Reviewed/Affirmed to date

- Third Party Measures
  - ❑ Efficient Pumps
  - ❑ Smart Thermostats\*
  - ❑ Cal TF Response: Producing “Gold-Plated” WP
  - ❑ No new measure review until New Measure Review Process developed/reviewed
- New Measure Review Process
  - ❑ Background Work
  - ❑ Status
  - ❑ Content

# Goal 2. Facilitate Statewide Coordination of IOU Workpapers

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- **Observation:** Significant improvement in SW Coordination in 2017
- **Cal TF Coordination Activities – Existing**
  - SW Coordination on WP – IOU only
    - ✦ WP leads make updates to master list; consolidated
    - ✦ Monthly call to discuss current and upcoming new measures and changes
- **2017 New Coordination Activities**
  - SME Bi-Weekly Calls – IOU and POU. Question: SW Coordination on policy/regulatory needed?
  - Measure Consolidation: Measure consolidation process
  - Common SW Guidelines for Measure Development/QA and QC
  - Common Repository: Public/private
  - Achieve Cost Reductions: Use SW coordination process to identify/eliminate unnecessary and/or duplicative costs.
  - Measure Screening Improvements – Incorporate into New Measure Review Process (forthcoming)
    - ✦ Better up-front screening of WP prior to invoking Cal TF and EAR review to ensure measure has reasonable chance of making it through review process
    - ✦ Better selection of high-value WP
    - ✦ Tight coordination with ET
    - ✦ Process needs to be SW coordinated and open to 3-P (per recent Phase III Order)

# Goal 2. Statewide Coordination of New WP Guidelines

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- **WP Development and QA/QC Guidelines**
  - Guidance for WP Developers
  - Guidance for Internal Peer Reviewers
  - Guidance for Internal Manager Reviewers
  - Appendices
    - ✦ Appendix 1: WP Template with instructions
    - ✦ Appendix 2: eTRM Data Specification Template (developed) and Instructions (to be developed once eTRM contractor on board – this is key area to have clarity around given ESPI feedback)
    - ✦ Appendix 3: Peer Reviewer Checklist
    - ✦ Appendix 4: Data Source QA Template
    - ✦ Appendix 5: Internal Manager Reviewer Checklist
    - ✦ Appendix 6: (TPP 6) Cal TF Peer Review instructions and checklist
- **Draft For Review:** Anticipated next week

# Goal 3. Implement “Best in Class” Electronic TRM

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- Major focus in Q1
  - Significant Progress; Strong engagement
- Major activities
  - Developed data specification; high level data dictionary
    - ✦ Multiple rounds of input from IOUs/POUs/CPUC
  - Mapped data flow through IOU/POU/CPUC tracking and reporting systems in old and new world
    - ✦ “Data Charrette” hosted by SCE; extensive follow-up
  - Developed and released eTRM Repository RFP
  - Strategic Measure Consolidation Plan complete
  - “Phase 1” measure consolidation well underway

# Goal 4. Develop Technical Position Papers Necessary for eTRM (at least 1)

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- 2017 TPP Supporting eTRM development
  - In-Progress
    - ✦ Statewide WP Development and QA/QC Guidelines
    - ✦ New Measure Review Process
  - Coming (possibly)
    - ✦ Process for validated new modeled measures (needed for 2018)
    - ✦ Overview of approach to determining which measures should have savings determined through metered rather than deemed savings
    - ✦ Approach to Developing CA Building Prototypes
      - If we can't get permission to use DEER Building Prototypes, still open issue
    - ✦ Approach to Modeled Residential Measures
    - ✦ “Compendium” of technical and policy rules applicable to deemed measures (2018 completion)

# Goal 5. Manage RFQ for New TF Members

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- 2017 Solicitation: Approach
  - Need to replace 5
  - Limit to 35
  - Needed expertise: Behavioral, modeling, statistics, study design, EM&V.
  - Requested continuing members to stay through completion of eTRM to maintain continuity through eTRM process
  - Stagger thereafter
- Results
  - Applications received (19)
  - Cal TF Members plus possibly 1 Cal TF Staff will review; PAC e-mail approval will be sought
  - “On-Board” New Members in June Meeting after training



## Goal 6. Develop 2018 Cal TF Work Plan

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- Cal TF 2018 Business Plan: Draft presented to Cal TF and PAC in October meetings
- Final presented to TF and PAC for approval in December meetings