

2017 Business Plan: Q2 Progress Report



ANNETTE BEITEL
JUNE 11, 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

- New Measure Review
 - ❑ Efficient Pumps, Smart Thermostats*
 - ❑ 3-P Request (retracted): Green fans
 - ❑ No new measure review requests from PAs
 - ❑ Pipeline sparse. Plan not to resume until agreement on New Measure Review process
 - ❑ New: Low Income Measures
 - ❑ **NOTE:** Unlikely to have five new measures reviewed by end of 2018
- New Measure Review Process
 - ❑ Schematic Review
 - ❑ Status of discussions
 - ❑ Next Steps

Goal 1. Review and Approve Selected Measures

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Regulatory Directive

- D.16-11-022 requires coordination with Cal TF:

"We direct the IOUs to coordinate with the California Technical forum to recommend prospective savings values and revisions to its EM&V methodologies for the low-income program." (p. 398)

- No timeline established

- Workpapers are specifically required for two measures

For thermostatic tub spouts, "The IOUs are directed to file workpapers to substantiate manufacturer savings claims per Commission rules, any workpapers submitted for measures in the ESA Program are subject to the same review and approval requirements as workpapers submitted in the mainstream energy efficiency portfolio." (OP 30 p. 453)

"We clarify that any Tier II Power strip should be in an appropriate setting and use existing workpaper process to establish performance baseline" (p. 398)

Goal 1. Review and Approve Selected Measures

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IOU “ask” of Cal TF and Next Steps

- Form Cal TF subcommittee
 - ❑ EM&V issues
 - ❑ Explore methods for specify savings values
- IOU consultation with staff
 - ❑ ID staff and establish expectations
 - ❑ Define scope, deliverables, and timeline for action
 - ❑ WPs for select measures
 - ❑ If broader set of WPs desired, push to post-eTRM

Goal 2. Facilitate Statewide Coordination of IOU Workpapers

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- **Observation:** With eTRM and Measure Consolidation activities, significant need for heightened engagement from SMEs, programs, products
- **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
 - ✖ New process starting July 2017 – outcome not clear
- **2017 New Coordination Activities**
 - **eTRM Oversight Committee**
 - ✖ Who? Same organizations as bid evaluation – funders plus CEC and CPUC
 - ✖ What: Weekly input on all key issues as eTRM is developed
 - **SME Pre-Subcommittee Input – Ongoing ***
 - ✖ Who? IOUs/POUs
 - ✖ What: Resolve “non-significant” measure inconsistencies. “Significant” measure inconsistencies relate to savings calcs, modeling, and costs.
 - **Cal TF “Governance” Subcommittee starting up – Likely Invitation-Only**
 - ✖ Development of eTRM Governance Document; Review/coordinate on statewide guidance documents and technical policy development
 - ✖ Participation: IOUs; POU; CPUC (CEC?) and Implementer Representatives
 - ✖ Common SW Guidelines for Measure Development/QA and QC *
 - ✖ Revisit Measure Screening Process – 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
 - Tighter coordination with ET
 - Process needs to be SW coordinated and open to 3-P (congruent with Phase III Order on 60% 3-P “designed and implemented” by 2020)
 - **Measure Consolidation *****
- *Denotes high value activity, independent of eTRM (reduce costs, achieve consistency, align with CPUC policy directives)

Goal 3: Implement “best in class” Electronic TRM

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- Major focus in Q1
 - Significant Progress; Strong engagement
- Major activities
 - eTRM Charette with successful eTRM bidder to clarify expectations (2 days, LA)
 - Draft contract circulated to “eTRM Oversight Committee” – July 17 comments due
 - Implementation of measure consolidation plan
 - Establish subcommittee review schedule
 - First 10 consolidated measures – end of July – underway; on track
 - **Key Question:** How to address Cal TF - recommended changes to currently approved measures?
 - ✦ Clear errors – fix
 - ✦ Changes to methods, costs, data – note and recommend change to CPUC in filing. Ongoing discussions with staff re: specific issues
 - Changes to DEER vs. Changes to WP values

eTRM Subcommittee Schedule

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	29-May	5-Jun	12-Jun	19-Jun	26-Jun	3-Jul	10-Jul	17-Jul	24-Jul	31-Jul	7-Aug	14-Aug	21-Aug	28-Aug	4-Sep	11-Sep	18-Sep	25-Sep	2-Oct	9-Oct	16-Oct	23-Oct	30-Oct	6-Nov	13-Nov	20-Nov	27-Nov	4-Dec	11-Dec	18-Dec	25-Dec	1-Jan	8-Jan	15-Jan	22-Jan	2017	2018	
Cal TF Meeting				6/22					7/27									9/27-28				10/26			11/15-16				12/14							1/25		
Governance Committee																																				1		
Technical, Cross-Cutting																																				1		
Commercial Refrigeration																		1				2													tbd	20	0	
Food Service																		1				2													tbd	15	0	
Agriculture / Pumps																		1				2													tbd	5	1	
Lighting																									1				2							tbd	11	42
HVAC																									1				2							tbd	2	50
Water Heating																									1											2	22	0
Appliance or Plug Load																									1				2							tbd	10	12
Building Envelope																																					0	4
Pools																		1																		2	1	5
Process																																					0	7
Miscellaneous																		1							2											tbd	2	4
Low Income Measures																																						

Green numbers = Number of Measures; **Blue** numbers: **1**=First Review / **2** = Affirmation.

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

- 2017 TPP Supporting eTRM development
 - In-Progress
 - ✦ Statewide WP Development and QA/QC Guidelines
 - ✦ New Measure Review Process
 - Coming (possibly)
 - ✦ Assessment of DEER Building Prototypes (2017)
 - IP issues addressed; moving bldg. prototypes to EnergyPlus/Open Studio underway.
 - ✦ Approach to Modeled Residential Measures (2017 or early 2018)
 - ✦ Process for Validating New Modeled Measures (2018)
 - ✦ Approach for determining which measures should have savings determined through metered rather than deemed savings (2018)
 - ✦ “Compendium” of technical and policy rules applicable to deemed measures (2018)
 - ✦ NOTE: Selection of final 2018 TPPs would occur closer to 2018

Goal 5. Manage RFQ for New TF Members

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- 2017 Solicitation: Approach

- Needed 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

- Next slide

Goal 5. Manage RFQ for New TF Members

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- 133 combined years of Energy Efficiency experience
- Doctorate, Master's and Bachelor's Degrees in:
 - Mechanical Engineering
 - Automotive Aerospace Engineering
 - Electrical Engineering
 - Engineering
 - Environmental Engineering
 - Physics
- Three licensed Professional Engineers
- Representation from utility, research, engineering, evaluation and consulting organizations

Goal 5. Manage RFQ for New TF Members

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- **Catherine Chappell**, Vice President, Energy Efficiency Consulting Services, *TRC*
- **Chan Paek**, Supervisor, Customer Programs - Engineering Services, *Southern California Gas Company*
- **Greg Barker**, Technical Director, *Energy Solutions*
- **Larry Brackney**, Project Manager, *NREL*
- **Lisa Gartland**, Energy Efficiency Engineer, *Proctor Engineering*
- **Mehdi Shafaghi**, Electrical Engineer, *LADWP*
- **Roger Baker**, Retired, *formerly Commonwealth Edison*
- **Sepideh Shahinfard**, Associate, *Cadmus Group*
- **Stefano Galiasso**, Senior Energy Engineer, *University of IL, Chicago, Energy Resources Center*

Goal 6: Develop 2017 Cal TF Work Plan

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- Cal TF 2018 Q1/Q2 Activities
 - Core focus:
 - ✦ Phase 2 eTRM completion;
 - ✦ Seeking regulatory approval for eTRM
 - ✦ Continue measure consolidation process
 - December 2018 eTRM completion
 - 125 remaining measures
 - Q1/Q2: 25 each quarter
 - Q3/Q4: 32 each quarter
 - Open Question: Will new measures be identified through “existing conditions” policy?
 - Technology categories:
 - Major: Lighting/HVAC
 - Minor: Bldg. envelope, process, pools, miscellaneous
 - New Measure Review Process: Pilot?
 - **PAC Request:** Comments on above approach?
- Cal TF 2018 Business Plan: Draft will be presented to Cal TF and PAC in October meetings
- Final presented to TF and PAC for approval in December meetings