



CALIFORNIA

TECHNICAL FORUM

DRAFT

Business Plan

20222023

**Redlines in this document indicate proposed removals/additions
for 2023 Business Plan (compared to 2022)**

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 (PAC) approval of this Business Plan does not constitute endorsement of ensuing technical work products by individual members or organizations.

Goal	Metrics	Tactics (Cal TF)	Benefits	Tactics (Others)
<p>1. Administer software development of eTRM v2.x</p>	<p>Implement enhancements for eTRM v2.x Complete by end of Q4 2022 <u>2023</u></p> <ul style="list-style-type: none"> All enhancements will be deployed on time, or modified by CPUC Staff as needed All enhancements will be completed within budget 	<p>Cal TF Staff will administer the eTRM v2.x software development contract and meet contract deliverables and timelines</p>	<p>Regulatory Compliance Statewide Consistency Quality Control eTRM User Experience Collaboration Stakeholder Engagement</p>	<p>eTRM Core Stakeholders include the funding utilities (PG&E, SCE, SDG&E, SCG, and LADWP) and regulatory agencies (CPUC and CEC) and the CPUC ex ante review (EAR) consultants. Each eTRM Core Stakeholder will:</p> <ul style="list-style-type: none"> Designate at least one primary and one backup representative who will participate in eTRM v2.x development as noted below. <p>Representatives of each eTRM Core Stakeholder organization will:</p> <ul style="list-style-type: none"> <u>Meetings</u>: Attend version kick-off and weekly meetings. <u>Planning</u>: For each enhancement, provide review/comment on Functional Requirements and Testing and Acceptance (T&A) criteria (for both sprint testing and client acceptance testing). <u>Sprint Testing/Client Acceptance Testing</u>: During each sprint, comment on wireframes, when applicable, view user interfaces, and test all features (enhancements) developed during the sprint. Document and submit results of all testing according to established T & A criteria and within project timelines. <u>Project Documentation</u>: As requested, review and comment on project documentation.
	<p>Document Update eTRM technical guidance</p>	<p>Cal TF Staff will develop <u>keep current</u> the guidelines on technical considerations for updating and maintaining the eTRM that could include:</p> <ul style="list-style-type: none"> eTRM updates do not adversely impact existing systems eTRM performance standards 	<p>Quality Control eTRM User Experience</p>	<p>eTRM Core Stakeholders will provide input on the technical guidance document.</p>

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	<p><u>Complete eTRM enhancement prioritization in 2023 Q2</u></p> <p><u>Identify and Socialize and implement eTRM 2022-2023 Enhancements: Within one (1) week of each eTRM Release</u></p>	<ul style="list-style-type: none"> Software development <u>and release</u> practices <p>Cal TF Staff will:</p> <ul style="list-style-type: none"> Track enhancements proposed by eTRM Core Stakeholders during development of eTRM v2.x. Solicit and memorialize feedback from users on experience with eTRM v2.x and possible enhancements. Document unsolicited recommendations for additional features and enhancements received via the eTRM@FutEE.biz account for <u>2022-2023</u> (Ongoing, via Contact Us feature). 	<p>eTRM User Experience Collaboration Stakeholder Engagement</p>	<p>eTRM Core Stakeholders and eTRM Users will provide input on enhancements to existing features and possibly new features.</p>
<p>2. Ongoing Implementation of Current eTRM Version</p>	<p>Complete <u>2022-2023</u> eTRM training objectives, including:</p> <ul style="list-style-type: none"> Conduct up to six (6) webinar trainings for various stakeholder user groups Conduct post-training survey 	<p>Cal TF Staff will implement eTRM training through the following activities:</p> <ul style="list-style-type: none"> Coordinate with the IOUs, POU, CPUC, and CEC to determine their training needs and timing. Solicit input on eTRM training needs of 3P implementers/other stakeholders through the eTRM user account email notification feature, Cal TF members, and other venues (such as CEDMC). <p>Cal TF Staff will provide customer support to eTRM users that could originate through the eTRM@FutEE.biz account, Cal TF, trainings, and other channels.</p> <p>Cal TF Staff will track Google Analytics on a monthly basis to understand and track eTRM usage.</p>	<p>Regulatory Compliance Statewide Consistency Quality Control eTRM User Experience</p>	<p>Each eTRM Core Stakeholder organization (defined above) will identify their respective internal users to receive eTRM training and support.</p> <p>CPUC Staff, CEC Staff and EAR consultants will provide input on the survey feedback they would like from eTRM users.</p>
	<p>Governance: Finalize eTRM Governance Plan with <u>expected eTRM 2022 owners key stakeholders (continuation from 2021, if needed)</u></p>	<p>Cal TF Staff will:</p> <ul style="list-style-type: none"> Finalize eTRM Governance Plan with input from <u>expected 2022 eTRM key stakeholders including CPUC, CEC, IOUs, POU, and others. owners (LADWP, SMUD, CPUCPG&E, SCE, SDG&E, SCG)</u> <p><u>Cal TF Staff will develop eTRM governance in coordination with CEDARS/CET governance plan.</u></p>	<p>Compliance</p>	
<p>3. Measure Management: Manage Existing</p>	<p>Track and report metrics for existing measure updates:</p> <ul style="list-style-type: none"> Number of measures updated in the eTRM 	<p>Cal TF Staff will manage the measure update workflow within the eTRM to support updates within the eTRM, while IOUs will perform the majority of measure development within the eTRM.</p>	<p>Statewide Coordination Statewide Consistency Quality Control Cost Savings</p>	<p>Measure developers and measure reviewers (including IOUs, POU, CPUC consultants, CPUC Staff, and 3Ps) will be</p>

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<p>Measure Updates</p>	<ul style="list-style-type: none"> Time (Start to Submission, then Published as Approved) - Time from start of updated measure loaded into eTRM to CPUC submission for each measure developed in eTRM Time – (Time spent updating measure – internal and consultant) Completeness & Accuracy – Use QC Checklist for measure development to ensure quality updates and to support continuous improvement Nature of Updates – for each update, track and report on nature of measure updates 	<p>Cal TF Staff will conduct training for measure developers regarding the measure update process in the eTRM and associated measure requirements.</p> <p>Cal TF Staff will update the <i>Statewide Measure Development and Peer Review QA/QC Guidelines</i> to incorporate a summary checklist to facilitate constructive feedback to measure developers.</p> <p>Cal TF Staff will QA/QC final measure updates to ensure conformance to the <i>Statewide Measure Development and Peer Review QA/QC Guidelines</i> and the <i>Style Guide</i>.</p> <ul style="list-style-type: none"> Results from QA/QC check will track causes for variation so that corrective actions (i.e., additional training or new enhancements can be identified) to support continuous improvement. <p>Cal TF Staff will implement the updates for the existing measures to incorporate features from the eTRM v2.x. Updates may not be extended beyond the existing published version of each measure, <u>which could include:</u></p> <ul style="list-style-type: none"> <u>Deemed measure property data</u> <u>Load shape input</u> <u>Measure lifecycle management data</u> <p>Cal TF Staff will begin tracking measure metrics when automated workflow features are available in the eTRM and if measure developers enter time spent accordingly.</p> <ul style="list-style-type: none"> Time and Cost 		<p>required to take the appropriate eTRM measure training.</p> <p>Measure developers will review the <i>Statewide Measure Development and QA/QC Guidelines</i> and will participate in periodic feedback sessions as part of the continuous improvement process.</p> <p>Stakeholder input required to define which updates are needed for existing measures.</p>
	<p>Coordinate monthly statewide meetings on new/updated measures for the Statewide Deemed Measure List</p> <p>Monthly</p>	<p>Cal TF Staff will:</p> <ul style="list-style-type: none"> Circulate the Statewide Deemed Measure List monthly to IOUs and POU for new measures and measure updates. Conduct monthly teleconferences with designated IOU and POU leads to review planned new measures and planned measure updates to ensure all parties are aware of changes/additions and can ensure measure changes/additions reflect statewide needs. Post monthly updated Statewide Deemed Measure List to Cal TF website. 	<p>Statewide Coordination Statewide Consistency Transparency</p>	<p>IOU and POU measure development leads will inform their IOU counterparts and Cal TF Staff of new measures and measure updates under consideration, in development, and retired, as well as the status of measures in development.</p> <p>IOU and POU measure development leads will ensure that new measures are developed to be applicable statewide and will reflect input from their counterparts at other IOUs and POU.</p>

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		<ul style="list-style-type: none"> • Distribute updated Statewide Deemed Measure List to designated IOU lead for submission to EAR Consultants. • Identify ways to integrate the Statewide Deemed Measure List with the eTRM so Statewide Deemed Measure list can be updated automatically rather than manually. • Cal TF meeting time available, solicit input from Cal TF membership on select updates to existing measures <u>including:</u> <ul style="list-style-type: none"> ○ New weather data updates (comm measures) ○ New Peak Period updates ○ New load shape updates ○ Refrigerant cost updates Add-on equipment policy updates 		
<p>4. <u>New Measure Management:</u> Manage and Implement the <u>Ongoing Statewide New Measure Development Process</u></p>	<p>Track and report metrics for all measures coming through the Cal TF New Measure Process</p> <ul style="list-style-type: none"> • Number of proposed measures submitted • Number of proposed measures affirmed by Measure Screening Committee • Number of measures not affirmed by Measure Screening Committee and the reason why; identify alternate path for measure • Number of proposed measures affirmed by the Cal TF • Number of proposed measures published in the eTRM • Time from Measure Initiation to Measure Submission 	<p><u>Measure Identification:</u> Cal TF Staff will work with various stakeholders <u>as a trusted, impartial partner</u> to identify potential new and updated measures, including: {Cal TF Staff will support until funding for Cal TF implementation runs out.}</p> <ul style="list-style-type: none"> • POU and CEC to identify measures they would like developed/added to the eTRM so the eTRM contains all POU and CEC measures (market-based, utility-funded, and EPIC projects). • 3P implementers and innovators/measure developers including proposed measures from ETP and EPIC. • IOUs, as they choose. • CPUC to included additional measures in the eTRM such as: <ul style="list-style-type: none"> ○ Cold water measures ○ Low income measures <p><u>Measure Screening Committee:</u> Cal TF Staff will manage and lead the statewide Measure Screening Committee to screen all proposed new measures/measure updates:</p> <ul style="list-style-type: none"> • Cal TF Staff screens Proposal form for completeness. <ul style="list-style-type: none"> • <u>Document Terms and Conditions.</u> • <u>Track action items.</u> • <u>Maintain transparency of the proposal list.</u> 	<p>Compliance Cost Savings Time Savings Quality Control Transparency Stakeholder Engagement Statewide Consistency</p>	<p>The Measure Screening Committee members will:</p> <ul style="list-style-type: none"> • Review materials in advance of each Committee meeting • Participate in each monthly meeting • Follow the established process and protocols. <p>All interested IOUs and POU and all IOU statewide measure Leads will participate in measure development/ update oversight process, beginning when each measure is assigned to a measure developer (internal or external).</p> <p>Assigned statewide measure Lead will submit measures to CPUC/EAR Team for review, in accordance with the measure development schedule provided to the CPUC Staff.</p> <p>POU staff will support the identification and development of POU measures for the eTRM.</p>

Goal	Metrics	Tactics (Cal TF)	Benefits	Tactics (Others)
		<ul style="list-style-type: none"> • Memorialize Screening Committee decisions. • Document the recommendations in the form of Measure Package Plan. • Upload “passing” measures into eTRM if draft measure capability is available. • For new measure types, document in a White Paper and socialize key issues with Measure Screening Committee, Cal TF Subcommittee, IOU/POU, and CPUC/CEC Staff prior to making a decision. <ul style="list-style-type: none"> ○ Procedural measures should be prioritized to evaluate how they can be included in the intake, screening, and review process <p><u>Statewide Coordination of Measure Development and QA/QC:</u> Cal TF Staff will:</p> <ul style="list-style-type: none"> • Manage statewide coordination process for all new and updated measures, consistent with the process and guidelines posted on the Cal TF website, which may change from time-to-time. • QA/QC all measures prior to submission to CPUC and/or publishing in eTRM to ensure measures conform to the statewide measure QA/QC Guidelines. • Solicit input from Cal TF membership on select new and updated measures. 	<p>Standardization Transparency Stakeholder Engagement</p>	<p>POUs will engage in monthly meetings to share information and collaborate on statewide approaches.</p>
<p>5. Continue Development of POU and statewide Custom Measures for the eTRM</p>	<p><u>Gather, organize, and prioritize existing custom guidelines, tools, and resources being used by POU, IOUs, and implementers.</u></p>	<p><u>Cal TF Staff will:</u></p> <ul style="list-style-type: none"> • <u>Compile and organize the guidelines, tools, and resources used by custom program stakeholders</u> • <u>Identify which materials are used and useful and potentially overlapping</u> • <u>Compare collected resources to custom program activity, claims, and other data to assess the value of statewide standardization for the POU and IOU custom portfolios.</u> • <u>Work through committee to identify and prioritize custom standardization efforts.</u> • <u>Update list of potential measures that could be uploaded and managed in eTRM.</u> 	<p><u>Stakeholder Engagement</u> <u>Standardization</u></p>	<p><u>POUs, IOUs, CPUC, CEC, implementers, and other stakeholders will:</u></p> <ul style="list-style-type: none"> • <u>provide input on relevant materials useful for standardizing and streamlining custom measures, projects, and programs.</u> • <u>provide input to help identify which custom resources are most relevant and valuable for custom program activity and claims potential.</u>

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	<p><u>Finalize High-Level Custom Roadmap by 2023 Q2</u></p>	<p>Cal TF Staff will:</p> <ul style="list-style-type: none"> • <u>Solicit and organize feedback on Cal TF Staff analysis of how existing eTRM tools can be used to standardize and streamline custom projects.</u> • <u>Prepare high-level draft Cal TF Custom Roadmap</u> • <u>Prepare final Cal TF Custom Roadmap with input from TF and Custom Subcommittee.</u> • <u>Present final roadmap to PAC</u> 	<p><u>Stakeholder Engagement</u> <u>Standardization</u> <u>Cost Savings</u> <u>Time Savings</u> <u>Customer Experience</u></p>	<p><u>POUs, IOUs, TF members, CPUC, and other stakeholders will provide input throughout the process.</u></p>
	<p><u>Develop and implement statewide methods for at least three (3) custom measures</u></p>	<p>Cal TF Staff will:</p> <ul style="list-style-type: none"> • <u>Facilitate the selection of custom measures</u> • <u>Facilitate the custom measure development process for statewide standard methods and clarity, consistency</u> • <u>Present developed methods to the TF members for review and approval/affirmation</u> • <u>Complete the custom measure template (measure characterization and data) for newly identified measures.</u> 	<p><u>Standardization</u> <u>Transparency</u> <u>Cost Savings</u> <u>Time Savings</u> <u>Stakeholder Engagement</u></p>	<p><u>POUs, IOUs, TF members, CPUC, and other stakeholders will provide input throughout the process.</u></p> <p><u>POUs, IOUs, CPUC, and implementers will provide custom project data to support this goal.</u></p> <p><u>TF members will approve/affirm statewide methods for each selected measure.</u></p>
	<p><u>Update eTRM documentation (ongoing, as needed)</u></p>	<p>Cal TF Staff review will include changes will update eTRM documentation as needed to include POU and statewide custom measures-measures in current processthe eTRM. Review-Updates will may include:</p> <ul style="list-style-type: none"> • eTRM Measure Characterization template • eTRM Measure and Permutation Data Spec templates • Measure Naming Convention • Measure Development and QA/QC Guidelines • eTRM Reference Library • New Measure Development & Review process <p>Cal TF Staff will document required eTRM enhancements <u>to develop Custom Measures within the eTRM using, if needed, to incorporate POU custom measures and tools in “flat file” format vs. “executable” format needed to implement.</u></p>	<p>Cost Savings Time Savings Customer Experience Standardization Transparency Stakeholder Engagement</p>	<p>POU, and, if interest and engagement, IOU, and CPUC custom project staff, will review and comment on Cal TF Staff analysis of how existing eTRM tools can be used to standardize and streamline custom projects.</p>
	<p><u>Implement select POU TRM and statewide tools/calculators in the eTRM</u></p>	<p>Cal TF Staff will:</p> <ul style="list-style-type: none"> • Update which tools/calculators are not in eTRM but would be “used and useful”. 	<p>POU-Customer Experience <u>Cost Savings</u> <u>Time Savings</u></p>	<p>POUs, IOUs, through their PAC representatives and TF members, will work</p>

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		<ul style="list-style-type: none"> • <u>Work with software developer to determine how custom POU “used and useful” tools could be moved into eTRM so they can be executed rather than just uploaded as a flat file.</u> • <u>Work with the software developer to implement selected custom solutions.</u> 	<u>Standardization</u>	<p>with Cal TF Staff to determine which are still “used and useful”.</p> <p><u>The CPUC Custom lead and CPUC Group D consultants will provide input and review.</u></p> <p><u>CPUC Staff and Group A consultants will provide input to ensure alignment.</u></p> <p><u>Cal TF members will help to provide the implementer perspective for this process.</u></p>
	<p>Identify and develop POU express custom and hybrid/procedural measures using the existing eTRM capabilities</p>	<p>Cal TF Staff will:</p> <ul style="list-style-type: none"> • Review POU custom projects. • Update list of potential measures that could be uploaded and managed in eTRM. • <u>Complete the custom measure template (measure characterization and data) for newly identified measures.</u> 	<p>Cost Savings Time Savings Customer Experience Standardization</p>	<p>POUs will provide custom project data to support this goal.</p> <p>The CPUC Custom lead and CPUC Group D consultants will provide input and review.</p> <p>CPUC Staff and Group A consultants will provide input to ensure alignment.</p> <p>Cal TF members will help to provide the implementer perspective for this process.</p>
<p>6. Identify, Analyze, and Recommend Key Emerging Technical and Technical Policy Issues in a Statewide Consistent Way</p>	<p>Develop at least one (1) Technical Position Paper (TPP)</p> <ul style="list-style-type: none"> • Draft TPP • Final TPP 	<p>Cal TF Staff will:</p> <ul style="list-style-type: none"> • <u>Solicit topics and priorities from PAC, TF members, and stakeholders</u> • <u>Propose and confirm final TPP topic with PAC</u> • develop <u>Develop</u> TPP with input from a Cal TF subcommittee. 	<p>Technical Rigor</p>	<p>The PAC will affirm the final TPP topic.</p> <p>Cal TF members will provide input and contribute to the TPP via subcommittee process.</p> <p>Proposed TPP topics will be discussed with regulatory staff (CPUC and CEC)</p>
	<p>Develop at least one (1) white paper</p> <ul style="list-style-type: none"> • Draft white paper • Final white paper 	<p>Cal TF Staff will develop white paper with input from a Cal TF subcommittee. Topics of high interest for the Cal TF are:</p> <ul style="list-style-type: none"> • Energy Plus / Prototype Development / Analysis Controller integration • Load Shape development and use beyond DEER measures • Integration into eTRM measure process for measure life: Potential and Goals, ETP, EM&V, and C&S 	<p>Technical Rigor Statewide Consistency</p>	<p>The Cal TF members will provide input to determine the final white paper topic(s).</p> <p>Cal TF members will provide input and contribute to the white paper via subcommittee process.</p> <p>Cal TF members will review updated documents.</p>

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		<p> Evaluate the business case for adding Measure Property Data (including properties and validation criteria) </p> <ul style="list-style-type: none"> Integrated Data Flow for Energy Efficiency Regulatory Review for Custom Measures and Projects <p>Ongoing white papers from 2019/2020 are:</p> <ul style="list-style-type: none"> New Measure Types Greenhouse Gas Calculation Approach and Data Sources; Recommendations for eTRM Creating Tighter Linkage Between Deemed Savings and EM&V Studies <p>Review and update existing Cal TF documentation (TPPs, white papers, templates), as needed.</p>		
<p>7. Manage the Cal TF and Cal TF PAC</p>	<p>Conduct at least ten (10) TF meetings (in-person or teleconference)</p>	<p>To manage Cal TF Meetings, Cal TF Staff will:</p> <ul style="list-style-type: none"> Prepare a calendar of TF meetings and locations, and post on Cal TF website Secure meeting locations and arrange other logistics (if meetings are in person; arrange for teleconference if not) Prepare meeting agendas and materials and post on Cal TF website Manage TF meetings Prepare meeting notes and post on Cal TF website Add meetings as needed to keep flow of new measures through the New Measure Review Process 	<p>Transparency Stakeholder Engagement Statewide Consistency</p>	<p>Cal TF members will:</p> <ul style="list-style-type: none"> Review materials in advance <u>of</u> all meetings Attend Cal TF meetings
	<p>Conduct additional subcommittee meetings</p>	<p>To manage the Cal TF Subcommittees, the Cal TF Staff will:</p> <ul style="list-style-type: none"> Recruit Cal TF subcommittee members and outside experts Arrange subcommittee teleconferences Prepare meeting agendas (as needed) and circulate meeting materials Facilitate Cal TF subcommittee meetings Prepare and track subcommittee action items Post meeting materials and resultant work products on Cal TF website 	<p>Transparency Stakeholder Engagement Statewide Consistency</p>	<p>Cal TF members and other interested industry stakeholders/subject matter experts will:</p> <ul style="list-style-type: none"> Participate in subcommittees that align with interests and expertise Review materials in advance all subcommittee meetings Attend subcommittee meetings

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		<p><u>2023 Subcommittees continuing from 2022 include:</u></p> <ul style="list-style-type: none"> • <u>Custom Subcommittee</u> • <u>New Measure Subcommittee</u> • <u>Deemed Measure Property Data Subcommittee</u> <p><u>Additional Topics could may include:</u></p> <ul style="list-style-type: none"> • GHG calculations • POU measures • Semi-deemed measures • Data visualization needs 		
	Review and Discuss Cal TF Governance Model, current practice.	<p>Cal TF Staff will:</p> <ul style="list-style-type: none"> • Facilitate discussions with PAC on current Cal TF governance documents and practice, and how governance has evolved. 	Transparency Clear Governance	<p>Review/comment from a broad range of stakeholders, including:</p> <ul style="list-style-type: none"> • Funders • PAC • Cal TF Members • CPUC and CEC Staff/Commissioners • CA 3P Stakeholders
	<p>RFQ Conducted for new members</p> <ul style="list-style-type: none"> • Q1 or Q2 2022 	<p>Cal TF Staff will:</p> <ul style="list-style-type: none"> • Facilitate the request for qualifications from stakeholders • Evaluate member expertise and scoring <p>Complete new member orientation</p>	Stakeholder Engagement	PAC members will affirm new member choices.
	Conduct four (4) PAC meetings (in person or teleconference); ad hoc meetings as needed	<p>To manage the PAC, the 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 • Facilitate PAC meetings • Prepare and circulate meeting action items 	Statewide Policy Consistency Oversight and Governance	<p>PAC members will:</p> <ul style="list-style-type: none"> • Review materials in advance <u>of</u> all meetings • Attend PAC meetings
	Maintain Cal TF website and update and post all materials	<p>Cal TF Staff will:</p> <ul style="list-style-type: none"> • Maintain current data and information (including Cal TF process documents) on the Cal TF website. 	Transparency Stakeholder Engagement	
	<p>Finalize the <u>20232024</u> Cal TF Business Plan and budget</p> <ul style="list-style-type: none"> • Draft by June <u>20222023</u> • Final by November <u>15, 20222023</u> 	<p>Cal TF Staff will:</p> <ul style="list-style-type: none"> • Solicit comments on the Draft Final <u>20232024</u> Cal TF Business Plan from Cal TF members, PAC members, CPUC Staff, CEC Staff, and other stakeholders. • Develop a Final <u>20232024</u> Business Plan that reflects stakeholder input. 	Transparency Stakeholder Engagement	<p>PAC, TF, CPUC Staff, and others will provide input on the Draft <u>20232024</u> Cal TF Business Plan.</p> <p>PAC will affirm the <u>20232024</u> Business Plan by Nov <u>15, 20222023</u>.</p>

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		<ul style="list-style-type: none"> • Submit the Final 20232024 Business Plan to PAC for review and approval no later than the November 20222023 PAC meeting. • All PAC members will have equal opportunity to provide input on budget/BP. 		