



CALIFORNIA
TECHNICAL FORUM

DRAFT ver. 1.0
Business Plan
2024

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. Testing

Metrics	Workplan Required ⁱ	Tactics (Cal TF Staff)	Benefits	Tactics (Others) ⁱⁱ
<ul style="list-style-type: none"> • Time from Start to CPUC Submission <ul style="list-style-type: none"> ○ New ○ Updated • Year Average Cost for: <ul style="list-style-type: none"> ○ New Measures ○ Measure Updates • Completeness & Accuracy • Nature of Updates 		<ul style="list-style-type: none"> • Train a Measure Manager within the IOUs and LADWP to be “single point of contact” • QA/QC final measure updates to ensure statewide conformance • Document, communicate, and track QA/QC issues identified during Cal TF Review • After each measure submitted for CPUC Staff review, seek and track feedback on QA/QC issues identified after CPUC review • Manage submittal of new/updated measures to CPUC 	Cost Savings Quality Control	PAs and LADWP will designate “single point of contact” to submit measures to Cal TF for QA/QC. PAs will submit yearly cost for new/updated measures and number of measures and measure updates.
GOAL 3. Lead New Measure Identification and Development (CORE)				
3A. Identify and facilitate Measure Screening Committee (MSC) evaluation at least twenty (20) New Measures	No	Cal TF Staff will lead a process to identify and evaluate potential new measures (custom, deemed, other). Cal TF Staff will track and report metrics for all measures coming through the Cal TF New Measure Process: <ul style="list-style-type: none"> • Number of proposed measures submitted • Number of proposed measures affirmed by MSC • Number of measures not affirmed by MSC 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 • Number of decarbonization/CO2/GHG/Low income measures developed through Cal TF/Other 	Customer Experience Stakeholder Engagement	Cal TF stakeholders, energy program stakeholders, and other innovators will engage with Cal TF Staff on new measure identification strategies.
3B. Develop at least five (5) or more New Measures approved by Measure Screening Committee.	No	Track metrics as described above.	Cost Savings Time Savings Quality/Accuracy	Measure updates funded through utility measure development budget.
3C. Develop at least five (5) or more Low Income approved by Measure Screening Committee.	No	Track metrics as described above.	Cost Savings Time Savings Quality/Accuracy	Low-income measures funded through low-income budget.

Metrics	Workplan Required ⁱ	Tactics (Cal TF Staff)	Benefits	Tactics (Others) ⁱⁱ
3D. Accelerate measure uptake of at least five (5) new measures or new offerings	Yes	Cal TF Staff will: <ul style="list-style-type: none"> Engage implementers to understand needs missing from current programs Engage implementers during the measure development process Develop training tools and presentations that can be delivered through Cal TF meetings or focused group meetings 	Increased measure uptake	Cal TF stakeholders, energy program stakeholders, and other innovators will engage with Cal TF Staff on new measure uptake strategies.
Goal 4. Data Integration and Data Analytics				
4A. Create map of EE/DR data flow from customer site to measure maturity	Yes ¹	Cal TF Staff will: <ul style="list-style-type: none"> Interview PAs, select 3P implementers, EM&V, MTA Administrator, others to understand how EE/DR data “flows through eTRM, CEDARs, CET, EDCS, etc. Create map of data flow from customer site through measure maturity Identify in map where data flow could be streamlined, automated, etc. 	Transparency Cost savings Time savings	Cal TF stakeholders will respond to requests for information and review and comment on draft map and recommendations.
4B. Prepare White Paper on role of NMEC in deemed and custom measures/projects	Yes	Cal TF Staff will: <ul style="list-style-type: none"> Summarize current regulatory framework for deemed measures, custom measures, and NMEC projects. Interview PAs, regulators, evaluators and implementers on how NMEC data can be used with deemed measure packages and custom data. Prepare draft White Paper on role of NMEC data in deemed measure packages and custom measures/projects. 	Transparency Cost savings Time savings	Cal TF stakeholders will respond to requests for information and review and comment on draft white paper and recommendations.
4C. Prepare Data Analytics White Paper on how EE/DR Data can be combined with other state/federal data to improve EE/DR program design, implementation, evaluation	Yes	Cal TF Staff will: <ul style="list-style-type: none"> Summarize EE/DR data that can be extracted at customer site and based on Commissions “15/15” rule to protect PII. Identify and characterize other sources of state and federal data that could be combined with EE/DR data through ArcGIS, PowerBI, Tableau and/or other data analytics packages 	Transparency Cost savings Time savings	Cal TF stakeholders will respond to requests for information and review and comment on draft white paper and recommendations.

¹ One Work Plan will be prepared for all “Data Analytics” goals

Metrics	Workplan Required ⁱ	Tactics (Cal TF Staff)	Benefits	Tactics (Others) ⁱⁱ
		<ul style="list-style-type: none"> • Interview PAs, 3P implementers, EM&V, MTA Administrator, others to understand how EE/DR data combined with other state and federal data at customer site level and/or 15/15 aggregated level could be used to improve program design, implementation and evaluation • Draft White Paper that describes value of using EE and DR data contained in EE/DR IT “Ecosystem” at 15/15 and customer site data combined with other data sources to improve program design, implementation and evaluation, better leverage other related efforts (Potential and Goals, Mkt Tx, etc.) and grid management/optimization with other customer-side efforts 		
GOAL 5. Custom Initiative				
5A. Prioritize, socialize, and incorporate program and policy recommendations to support statewide standardization and streamlining in the development and delivery of custom measures, projects, and programs	Yes	Cal TF Staff will: <ul style="list-style-type: none"> • Develop a workplan to incorporate selected program and policy improvements. • Work with core custom stakeholders to implement workplan. 	Stakeholder Engagement Standardization Transparency Time Savings Cost savings	Custom Stakeholders will review Cal TF recommendations and provide input to determine which recommendation can be incorporated directed by stakeholders and to help select and prioritize which policy recommendations to pursue.
5B. Implement the eTRM Custom Library	No	Cal TF Staff will: <ul style="list-style-type: none"> • Develop the Custom Library in the eTRM according to eTRM Custom Phase 1 Functional Specifications developed in 2023 • Populate the Custom Library with tools and resources vetted through the Custom Subcommittee and TF (when appropriate) • Coordinate resource locations with CPUC, CEC, PAs, and other custom stakeholders to avoid duplication and ensure the eTRM Custom Library is maintained up to date. • Socialize the Custom Library with stakeholders to ensure awareness of the centralized, statewide, up-to-date resource for custom stakeholders 	Standardization Transparency Time Savings Stakeholder Engagement Customer Experience	Custom Stakeholders will: <ul style="list-style-type: none"> • Provide input on the final Functional Specifications, testing, and potential future improvements • Support socializing the eTRM Custom Library among stakeholders
5C. Develop SW Custom Measure Packages (CMP) ^{iv} for at least five (5)	Yes	Cal TF Staff will:	Standardization Transparency Cost Savings	POUs, IOUs, TF members, CPUC, and other stakeholders will provide input throughout the process.

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measures and at least five (5) SW Custom Tools		<ul style="list-style-type: none"> Facilitate the selection of custom measures and tools based on the prioritized measure lists developed in 2023 Develop guidelines for statewide tools to support consistent formats, data structures, and ongoing maintenance Develop draft SW CMPs with stakeholder input Develop and/or update selected tools with stakeholder input Facilitate the technical review and affirmation of the CMP and tools by the Custom Subcommittee and TF Incorporate the affirmed CMP and tools into the Custom Library and provide notifications to custom stakeholders 	Time Savings Stakeholder Engagement	<p>The CPUC Custom lead and CPUC Group D consultants will provide input and review. CPUC Group A consultants will review to ensure alignment with Deemed.</p> <p>TF members will affirm Custom Measure Packages. for each selected measure.</p> <p>PAs and CPUC will support the use of affirmed Custom Measure Packages.</p>
5D. Begin Implementation of eTRM Custom Modules	Yes	<p>Cal TF Staff will:</p> <ul style="list-style-type: none"> Socialize eTRM Custom Modules among stakeholders to support awareness and buy-in of integrated, transparent, and statewide custom measure and project platform (continued from 2023 BP) Develop business requirements and functional specifications for eTRM Modules with stakeholder input (continued from 2023 BP) Facilitate stakeholder input process to prioritize and schedule eTRM module implementation Implement selected eTRM module(s) Develop appropriate documentation to support implemented eTRM modules and tools Socialize eTRM modules and provide training and user support as needed to ensure awareness and effective use among stakeholders <p>eTRM Custom Modules may include:</p> <ul style="list-style-type: none"> eTRM Statewide Custom Measure Packages with SW Custom Measure Codes eTRM Custom-Calculated Measures (i.e., “Hybrid Measures”) Custom Project Development Custom Project Library and Technical Review (i.e., replacement of CMPA) 	Customer Experience Cost Savings Standardization Time Savings Transparency	POU, 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.

Metrics	Workplan Required ⁱ	Tactics (Cal TF Staff)	Benefits	Tactics (Others) ⁱⁱ
		<ul style="list-style-type: none"> • Custom Project Disposition Library (i.e., replacement of Disposition Database) 		
GOAL 6. Identify, Analyze, and Recommend Key Emerging Technical and Technical Policy Issues in a Statewide Consistent Way				
6A. Develop at least one (1) Technical Position Paper (TPP) ^v	Yes	Cal TF Staff will: <ul style="list-style-type: none"> • Solicit topics and priorities from the PAC, TF members, and stakeholders • Propose and confirm final TPP topic with PAC • Develop TPP with input from a Cal TF subcommittee 	Technical Rigor	The PAC will affirm the selected TPP topic(s).
6B. Develop at least one (1) White Paper ^{vi}	No	Cal TF Staff will develop white paper with input from a Cal TF subcommittee, in addition to White Papers otherwise listed on this BP. Topics of interest include: <ul style="list-style-type: none"> • Analysis controller integration • Load shape development and use beyond DEER measures • Measure lifecycle integration into eTRM (potential and goals, ETP, EM&V, and C&S) • Integrated data flow for energy efficiency 	Technical Rigor Statewide Consistency Stakeholder Engagement	The Cal TF members will provide input to select the white paper topic(s). Cal TF members will provide input and contribute to the white paper via subcommittee process.
GOAL 7. Manage the Cal TF and Cal TF PAC (CORE)				
7A. Conduct at least ten (10) TF meetings (may be in-person or via teleconference); organize lead subcommittee and ad hoc meetings	No	Cal TF Staff will: <ul style="list-style-type: none"> • Organize and lead Cal TF and PAC per Cal TF Process Rules • Maintain Cal TF Website and internal/external Cal TF documentation as relevant and up-to-date 	Transparency Stakeholder Engagement Statewide Consistency	Cal TF members will: <ul style="list-style-type: none"> • Review materials in advance of all meetings • Attend Cal TF meetings
7B. Conduct four (4) PAC meetings (in person with teleconference options); ad hoc meetings as needed	No	Cal TF Staff will: <ul style="list-style-type: none"> • Schedule and facilitate quarterly PAC meetings and ad hoc PAC meetings based on policy needs and activity • Provide updates on BP during quarterly meetings 	Statewide Policy Consistency Oversight and Governance	PAC members will: <ul style="list-style-type: none"> • Review materials in advance of all meetings • Attend PAC meetings
7C. Develop and finalize the 2025 Cal TF Business Plan (BP)	No	Cal TF Staff will: <ul style="list-style-type: none"> • Prepare a Draft 2025 BP in collaboration with Cal TF members by end of Q2 2024 	Transparency Stakeholder Engagement	PAC, TF, CPUC Staff, and others will provide input on the Draft 2025 Cal TF BP. PAC will affirm the 2025 BP by end of November 2024.

Metrics	Workplan Required ⁱ	Tactics (Cal TF Staff)	Benefits	Tactics (Others) ⁱⁱ
		<ul style="list-style-type: none"> • Solicit comments on the draft 2025 Cal TF BP from PAC and TF members, CPUC and CEC Staff, and other stakeholders • Seek PAC affirmation of 2025 Cal TF BP by end of November 2024. 	Oversight and Governance	
7D. Update 5-year Roadmap in conjunction with the Business Plan update process.	No	Cal TF Staff will: <ul style="list-style-type: none"> • Prepare Draft Roadmap Updates in collaboration with Cal TF members by end of Q2 2024 • Solicit comments on the draft Roadmap Updates from PAC and TF members, CPUC and CEC Staff, and other stakeholders • Seek PAC affirmation of Draft Roadmap Updates by end of November 2024. 	Transparency Stakeholder Engagement Oversight and Governance	PAC, TF, CPUC Staff, and others will provide input on any updates to the 5-year Cal TF Roadmap. PAC will affirm the Cal TF Roadmap by end of November 2024.

ⁱ When required, Cal TF Staff will develop a more detailed workplan for the Business Plan Metric, including: the content described in Metric 8C. Cal TF Staff should scale the level of detail in the Workplan to the scope.

ⁱⁱ The “Tactics (Others)” column indicates the requirements and expectations of Cal TF stakeholders to achieve each Business Plan metric. When possible, the referenced Cal TF Stakeholder representative should contribute to the tactic; when necessary, the stakeholder representative may assign a designee for participation and/or input.

ⁱⁱⁱ eTRM Core Stakeholders include the funding utilities (PG&E, SCE, SDG&E, SCG, and LADWP), regulatory agencies (CPUC and CEC), and the CPUC ex ante review (EAR) consultants.

^{iv} Custom Measure Packages are the comparable to Deemed Measure Packages, but applied to custom measures. A Custom Measure Package includes the Custom Measure Characterization (a description of the measure, eligibility requirements, recommended savings calculation and M&V methods, and required data collect) and associated tools and resources to support the inclusion of the custom measure in a custom project.

^v Cal TF develops Technical Position Papers (TPPs) on topics related to technical policy issues of general interest to Cal TF participants. TPPs lead to project work and hence are approved by the PAC. Examples of TPPs can be found on the Cal TF website (<http://www.caltf.org/tools>).

^{vi} Cal TF develops White Papers (WPs), analogous to scoping memos, to define issues that Cal TF members are interested in considering. Examples of Cal TF White Papers can be found on the Cal TF website (<http://www.caltf.org/tools>).