

# California Technical Forum Overview

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**CALIFORNIA**

TECHNICAL FORUM

**ANNETTE BEITEL**

**JUNE, 2014**

# Executive Summary



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- Overview of Northwest Regional Technical Forum (NW RTF)
- The California Technical Forum (Cal TF)
  - Organizational Structure
  - 2014 Roles and Responsibilities
- Current CPUC Requirements—Cal TF Alignment

# Northwest Regional Technical Forum



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- Pacific Northwest Regional Technical Forum (NW RTF) that has achieved:
  - ❑ Written, agreed-upon, consistent guidelines for determining energy savings and other measure parameters
  - ❑ Timely and credible savings values and other measure parameters
  - ❑ Technically rigorous and well-documented values
  - ❑ Transparency regarding how values were developed
  - ❑ Effective peer review of technical information
  - ❑ Easily searchable and understandable database of measure savings and other measure parameters, plus readily accessible, public documentation and records of the decision-making that led to the values
  - ❑ Consistent values used by utilities (160+) in four Northwestern states

# NW RTF: Formation, Budget, Structure



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- **Formation**

- Congress charged Bonneville Power Administration & Northwest Power Planning Council to establish and administer the Regional Technical Forum

- **Budget**

- The annual NW RTF budget is: **\$1.8 million dollars**
- The budget is largely used to fund the RTF Administrator staff and website

- **Structure**

- **NW RTF Policy Advisory Committee (RTF PAC)**
  - ✦ Largely RTF funders
  - ✦ Directs RTF work
- **NW RTF Members**
  - ✦ 30 technical experts, largely volunteer; help develop and approve RTF work – measure parameters, templates/forms, guidelines
- **RTF Administrator**
  - ✦ Performs and ensures RTF work is completed consistent with RTF Member-adopted guidelines
  - ✦ RTF Administrator Staff include: Chair (1); Technical Staff (7); Admin/Mgmt Staff (approx. 3 FTE)

# NW RTF:

## Responsibilities and Decision-Making



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- **RTF Charter, Bylaws and Conflicts Policy**
  - Approved by RTF PAC
- **RTF Work Plan**
  - 3-Year Business Plan/budget and annual Work Plans/budget updates developed by RTF Administrator staff and approved by RTF PAC. The Business Plan identifies the protocols and savings values that will be updated each year.
- **RTF Work**
  - RTF Administrator staff work with RTF Members to collaboratively develop energy savings values and other measure parameters, forms/templates and guidelines.
    - ✦ RTF Members review measure workpapers and support
    - ✦ Concerns addressed from start rather than *ex post*
    - ✦ All deliberations are public, well-documented, and consistent with RTF Member-adopted guidelines
    - ✦ All stakeholders may publically comment on workpapers to enhance quality of proposal
    - ✦ RTF Members vote on and endorse use of workpaper results to avoid future issues around savings estimates and other measure parameters
- **Voting:** 40% quorum; 60% approval

# The Cal TF



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The California Technical Forum (Cal TF), modeled on the Northwest Regional Technical Forum (NW RTF), is a collaborative of experts who use independent professional judgment and a transparent, robust process to review and endorse technical information related to California's energy efficiency portfolio. The Cal TF was created in 2014 by a broad group of stakeholders led by NRDC and is funded yearly by participating program administrators.

## ***Vision***

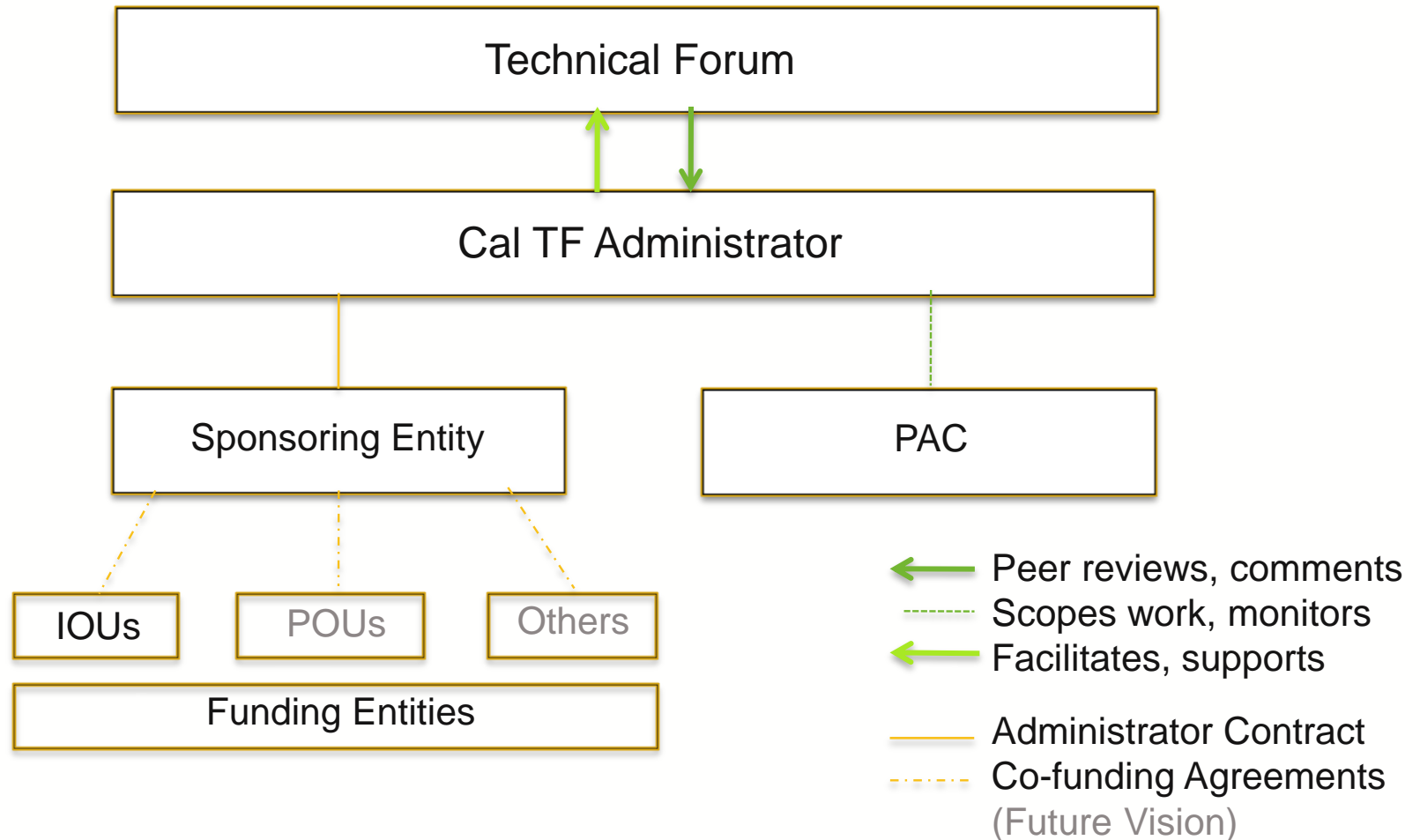
*A nationally respected source of standard energy efficiency savings estimates.*

## ***Mission***

*To support the growth and success of energy efficiency through independent and transparent peer review of California energy efficiency values*

# Cal TF: Structure

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# Cal TF: Structure and Voting

- **Cal TF Policy Advisory Committee (Cal TF PAC)**
  - ❑ IOUs (4 positions)
  - ❑ Public Utility Representatives (4 positions - 2 each representing Northern and Southern Public Utilities: SCPPA, NCPA, SMUD, LADWP)
  - ❑ Local Government Representatives (3 positions – REN, CCA, Local Government)
  - ❑ Environmental Advocate (1 position) (NRDC)
  - ❑ Program Implementer Representatives (2 positions – Efficiency Council, NAESCO)
  - ❑ Ratepayer Advocate (1 position – DRA)
  - ❑ Regulators (2 positions – CPUC and CEC staff)
  - ❑ System Operator – CAISO
- **Responsibilities (2014):**
  - ❑ Approves TF Members
  - ❑ Develops “Future Cal TF Vision” Document (2015 and beyond)
  - ❑ Quarterly, reviews progress towards 2014 Business Plan goals
  - ❑ Funds Cal TF (IOUs)
- **Decision-Making:** Consensus Decision-Making



# TF Members: Proposed Members, Voting, Responsibilities



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- **TF Members:** 30 members based on competitive RFQ process.
  - ❑ Membership represents fair balance in terms of technical expertise, sector experience, technology focus, policy experience and institutional experience.
  - ❑ Commission DEER consultants may not participate since they can't review their own work.
  - ❑ Seeking in-state and out-of-state perspectives, including ACEEE, CEE, DOE, LBNL, ASHRAE, other experts.
  - ❑ Members selected and approved by PAC; TF Members from IOUs may not be majority vote.
- **Responsibilities (2014):** Participate in development and approval of:
  - ❑ New Measure Workpapers
  - ❑ Guidelines, forms, and other documents related to measure development
  - ❑ Website – Well-organized, easily searchable database of technical information
  - ❑ Other technical duties related to EE programs
  - ❑ **2015 and Beyond:** Established through “Future Cal TF Vision” document, may include commenting on DEER updates, improving CA technical processes and values.
- **Decision-Making:** Consensus with “Comparison Exhibit” memorializing non-consensus items.

# Cal TF Administrator

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- **TF Chair/Facilitator**

- Experience: At least 10 years' EE experience; experience leading EE collaboratives; technical degree, preferably graduate; experience with energy efficiency Technical Reference Manual development (energy savings values documents)
- May not administer, implement or evaluate EE programs in CA

- **TF Staff**

- Hired and managed by the Cal TF Facilitator: Annette Beitel
- Technical and Policy/Project Management Staff
  - ✦ Technical: Jenny Roecks
  - ✦ Policy: Alejandra Mejia

- **TF Chair and TF Staff Responsibilities**

- Draft documents for PAC review, e.g. Cal TF Charter, Cal TF Bylaws, Cal TF Conflicts Policy, Cal TF Business Plan.
- Workpapers: (WP): Oversee development of and/or collaborate on development of WP for new measures.
- Guidelines: Work with WP proponent and TF Members to develop associated new measure guidelines.
- Website: Develop searchable website that memorializes Cal TF work.
- Work with PAC and TF members to develop "Future Cal TF Vision" document.

# Consistent CPUC Policy Directives on Ex Ante Values, Non-DEER WPs



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- Collaborative
- Transparent
- Well-Documented, Easily Available
- Best Available Data
- Strikes Reasonable Balance Between Accuracy, Precision, and Timeliness; Cost and Certainty
- Minimizes Ex Post Risk

# CPUC Ex Ante Policy Directives Alignment: Cal TF



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- Collaborative
  - By Design
- Transparent
  - By Design: public TF meetings; all information on website.
- Well-Documented, Easily Available
  - All values will be documented in consistent templates; values to be linked to underlying data on web and in WP templates.
- Best Available Data
  - Broader range of experts will weigh in; increases likelihood of “Best Available Data”
- Strikes Reasonable Balance Between Accuracy, Precision and Timeliness; Cost and Certainty
  - TBD
- Minimizes Ex Post Risk
  - TBD