

DRAFT 2020 Cal TF Business Plan



CALIFORNIA
TECHNICAL FORUM

CAL TF STAFF
OCTOBER 1, 2019

2019 Cal TF Business Plan

| Goal | Metric | Tactics (Cal TF) | Tactics (Other) |
|---|---|---|--|
| <p>Develop the 2020 Cal TF Business Plan</p> | <p><u>Cal TF 2020 Business Plan Developed</u></p> <ul style="list-style-type: none"> • Draft by October 15, 2019 • Final by the December 2019 PAC Meeting | <p>Cal TF Staff will solicit comments on Cal TF 2020 Work Plan from TF, PAC, CPUC and CEC staff, and other stakeholders.</p> <p>Cal TF Staff will update the draft plan to reflect the stakeholder input.</p> <p>Cal TF Staff will develop a final Business Plan reflecting input for PAC review and approval in the December 2019 PAC meeting.</p> | <p>PAC, TF, CPUC Staff, and others will provide input on 2020 Cal TF Business Plan.</p> <p>PAC will affirm the Business Plan by December 2019.</p> |

Origin of Draft Cal TF 2020 Business Plan Items

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- Extension of prior work
 - Measures, eTRM
- “Stage II Issues”
 - Measure level – Hybrid measures
 - Technical Position Papers (TPPs) – PAC vs. TRC
- Prior Requests/Suggestions Cal TF Could Not Accommodate
 - Modeling
 - Custom Process Improvement/Engagement
- “Big Impact” Technical Policy Issues
 - Potential study approach and results

Why Cal TF?

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- **“Think Big”** vs. incremental approaches
- **Statewide** vs. IOU/POU
- **Power of the Collaborative**
- **Transparent**
 - Gives the market visibility and a voice
- **Cost-Efficient**
 - Funding spread across six funding agencies
- **Standardization** (which also leads to cost savings . . .)
- **Simplicity**
- **Results**

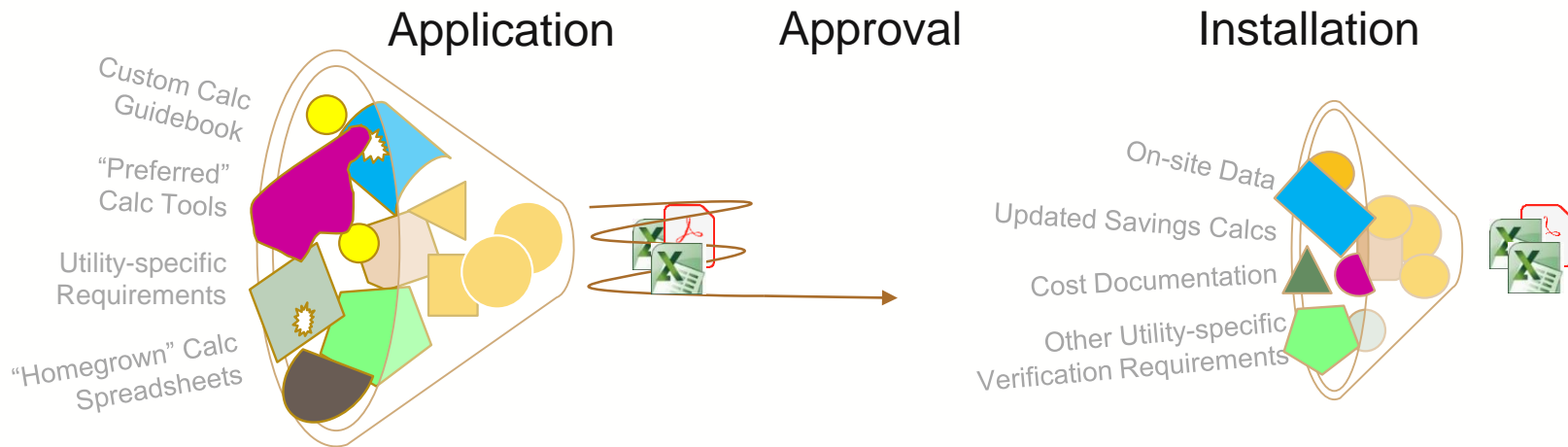
Next Steps

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- Individual PAC member meetings – October/November
- Present to Cal TF in October Meeting (draft); November meeting (draft final)
- Discuss with CPUC and CEC Staff and ex ante consultants
- PAC teleconference in November to present draft final
- Present to PAC in December for final affirmation

Custom Starting Point

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Pre-Installation Submittal

- Calculations performed with preferred tools or homegrown spreadsheets
- Lack of clarity for data collection requirements or if assumptions are acceptable
- Perception of missing pieces of information
- Rules and knowledge of precedence are onerous
- Screening and approval process requires iterations
- Duration from application submittal to approval is lengthy, costly and unpredictable

Post-Installation Submittal

- Must comply with installation requirements
- Savings analysis updated with varying levels of supporting documentation
- On-site data collection varies
- Cost documentation varies

eTRM: Hybrid & Custom Future State

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- Standardized application & installation reports
- Standardized calculations
 - Includes locked down parameters
- Guidelines on base case (additional data if existing conditions baseline)
- Guidelines on M&V requirements
- Organized and complete repository of regulatory requirements
 - ISP, ET, Baseline studies
 - Dispositions, etc
- Documentation requirements
 - Viability / operation
 - Influence
 - Project cost
 - Links to QPLs
- Documentation of workflow

