

# Electronic Technical Reference Manual (eTRM): “Sneak Preview”



**ANNETTE BEITEL**  
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# eTRM Project

2

Two key elements (2018)

1. Development of eTRM Database
2. Developing/populating eTRM with single set of **statewide consolidated measures**

eTRM structure/process well-aligned with long-standing Commission policy on DEER/ex ante review

- ❑ Transparent
- ❑ Well-documented
- ❑ Best Available Data
- ❑ Collaborative
- ❑ Strikes reasonable balance between accuracy and precision/cost and certainty
- ❑ Minimizes ex post risk

# The eTRM

## Supports CPUC Policy Directives



4

Since 2012, the Commission has directed utilities to prepare *statewide* workpapers.

We agree that **similar measures delivered by similar activities should have single statewide values** [emphasis added] unless recent evaluations show that a significant variation between utilities and that difference is supported by a historical trend of evaluation results. (D.12-05-015, p. 54)

Commission Staff guidance to utilities for 2017 workpapers in the Ex Ante Team 2017 Workpaper Guidance Memo:

**Statewide Workpapers: Only one workpaper may be submitted for each set of programs/measures which are adopted by more than one program administrator**; such workpapers have been termed “statewide workpapers” and program administrators have been directed to collaborate on such efforts. (p.7)

Direct regulatory support is contained in the Phase 2A decision in the Rolling Portfolio proceeding:

“.. to improve the usability and transparency of all ex ante values... **a common platform for all PAs to compose savings estimates transparently and consistent with Commission direction...** should be focused on **opportunities to facilitate transparency and collaboration.**”

# Measure Standardization

5

***“Utilities non-DEER measure naming and classification process lacks uniformity and the workpaper standards of content, methodological approach, documentation conventions and formatting vary widely in quality and completeness. Additionally, the workpaper development and updating process is ad hoc in nature with each utility having its own methods and timing for managing its collection of workpapers. The current approach makes it very difficult for ED to review new proposed non-DEER measures.”***

Citing: ALJ Ruling Regarding Non-DEER Measure Ex Ante Values (ALJ Gamson, November 18, 2009, pp. 1-2).

# Key Benefits of the eTRM

6

- **All Measures are Fully Documented and Reproducible**
  - All measure parameters for a single measure linked
  - Source documents are clearly cited, linked to values, and hosted in the tool
  - Methods, calculations, models are clearly documented
- **Automates Measure Updates when Inputs Change—Weather Files, Code Updates, Etc.**
  - Changes that apply to multiple measures or all measures will occur automatically
  - Reduces potential for errors
  - Includes clear update and revision histories for each measure
- **Clear and Documented Workflow Management**
  - Identifies who has updated and/or reviewed a measure
- **Generates All Key Outputs (Ex Ante Data)**
  - Utility/POU tracking, reporting and cost-effectiveness databases; CPUC reporting and CEC forecasting databases
  - Streamlined regulatory reporting
  - APIs will link directly to utility data systems
- **Differential Access**
  - Permits restricted access to prevent unapproved changes
  - Accurate revision history archived

# The eTRM

## Key Benefits to Implementers

7

- **Statewide Applicability & Consistency**

- No gaps in IOU/POU utility service territories or climate zones
- Consistent offerings
  - ✦ Baselines and measure definitions, units, methods, adjustment factors, etc.
- Statewide naming conventions
- Consistent, detailed descriptions
- Essential for third-parties to effectively design and implement an increasing share of the EE portfolio

- **Transparent and Fully Documented**

- Full documentation of input parameters, assumptions, models
- Clear, concise explanations of impact and cost analyses and key measure information
- Reference library contains source documents - no broken links

- **Easily Accessible**

- Includes user guide and training
- User-friendly interface
- All measure values/information, review disposition, etc. in a single platform

# The Path Forward: Upcoming

8

- Critical Path for eTRM Approval and Acceptance:
  - Regulatory path
  - Measure consolidation
  - eTRM development, acceptance testing



# The Path Forward

## eTRM Development Schedule

- Phase 1: Testing and acceptance w/ first 75 consolidated measures.
  - **July 9** Testing and Acceptance copy released
    - ✦ 3 testers from each “core” organization
    - ✦ Cal TF will receive a demo of Phase 1 in the July 2018 Cal TF meeting. This demo is open to the public.
    - ✦ PAC will receive demo of Phase 1 in July 17 PAC meeting
    - ✦ Cal TF Staff happy to provide other demos to interested “core” organizations.
  - **July 9 – August 3**
    - ✦ Official testing and acceptance period
  - **September 4 (tentative)**
    - ✦ All Phase 1 items identified in “Testing and Acceptance” addressed
    - ✦ Phase 1 “User Guide” finalized