

Cal TF September Meeting



CAL TF STAFF
SEPTEMBER 27, 2018

Cal TF Staff Proposal for New Measure & Measure Update Process for 3Ps

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JENNIFER BARNES

New Measure Process for 3Ps

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- **Overarching Objective:** Provide a process through which third-party program implementers and other non-utility entities can propose and/or develop new measures & updates that is consistent with CPUC policy directives and technical requirements.
- Regulatory Context
 - Per D. 18-01-004, IOUs are still in a key measure development role but required to submit on behalf of 3Ps
 - “...*the program administrators are required to accept and review all third party workpapers before submission to the Commission.*”

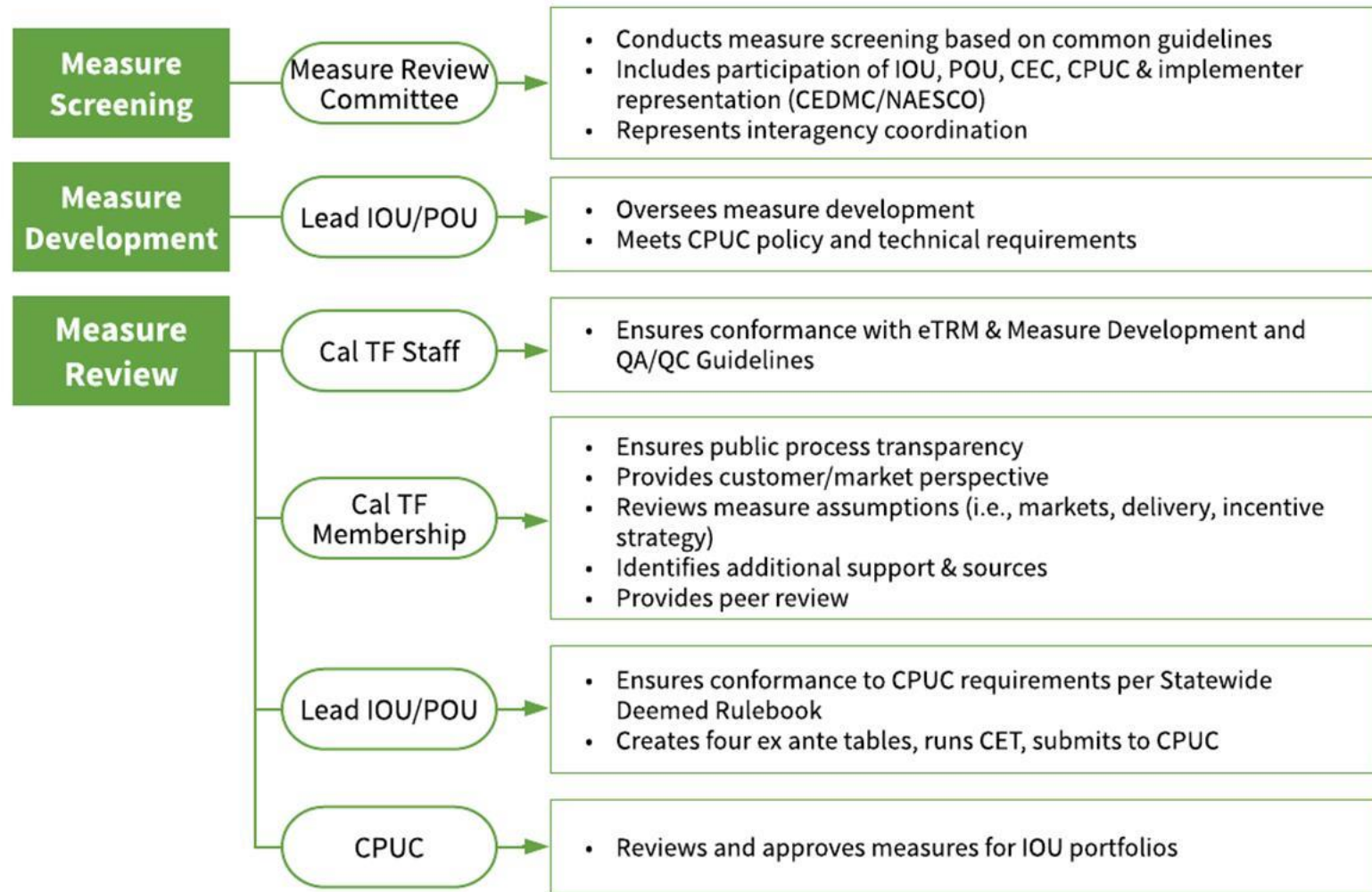
New Measure Process for 3Ps

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- Specific objectives:
 - *Clear and Transparent Public Process*
 - Achieve Single Set of *Statewide Measures*
 - Clear Guidelines
 - ✦ Deemed Rulebook (Commission requirements)
 - ✦ WP Template (eTRM Data Specification) with Data Dictionary
 - ✦ QA/QC Guidelines
 - Aligns with Commission Policies that Measure Development Should be Transparent and Collaborative

Cal TF Staff Proposal

New Measure Process for 3Ps



New Measure Process for 3Ps

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- Similar to previously developed TF process but maintains IOU role/responsibility for WP submission
- Maintains key aspects of Cal TF proposed process:
 - ❑ Measure screening by broad industry committee
 - ❑ Cal TF expertise & peer review
 - ❑ Transparency through a public process
 - ❑ Early EAR team engagement & guidance
 - ❑ Leverages Cal TF/eTRM forms & guidelines
- In addition:
 - ❑ A mandatory process for third-party measures
 - ❑ Allows 3Ps to develop their own measures
 - ❑ Disputes over measure requests handled by CPUC & CEC staff

New Measure Process for 3Ps

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- Discussion & Feedback
 - What benefits does the process provide to:
 - ✦ Third-parties
 - ✦ IOUs & POUUs
 - ✦ CPUC staff/EAR team
 - What are the drawbacks?
 - Does assumption that third-parties will fund measure development disadvantage smaller firms without engineering expertise?

eTRM Measure Development & QA/QC Guidelines

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Measure Development & QA/QC Guidelines

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- Overarching Objectives

- Detailed Field-by-field guide to ensure high-quality, standardized, and thoroughly vetted statewide measures with adequate documentation
 - ✦ How do I complete this field?
 - ✦ What does it mean?
 - ✦ Range of allowable values
- Serve as a “how to” reference for measure developers and “internal” reviewers
- Serve as a *companion* to the SW Deemed Rulebook

- Single volume of formerly separate guidelines/documents

- Data Dictionary
- Statewide Measure Naming Convention
- Includes links to other resources for measure development and documentation

- eTRM Alignment

- Updated to align with the eTRM data spec
- Reflects eTRM vocabulary, workflow, and brand

Example of Contents

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Common Measure Parameters

Measure Application Type

Measure Developer

Measure application type, also called installation type, classifies an energy efficiency activity and dictates the appropriate baseline treatment, measure effective useful life, eligibility, documentation requirements, and cost calculation methodology.

Peer Review QA/QC

- ☐ Verify that all proposed measure application types are specified.

Building Type

Measure Developer

A building type refers to the prototypical building that is meant to represent an average building in California. There are 24 commercial buildings (in the commercial, industrial and agricultural sectors) and 4 residential buildings that comprise the primary types of building that exist for California measures.

The Building Type that represents the weighted average of *all* commercial or *all* residential building types is designated as either 'Com' and 'Res', respectively.

The 'Any' Building Type designation should be used to specify measures for which savings do not depend upon Building Type.

Only Building Type on the CEDARS building type list are eligible; do not assign "non-standard" building types.

Peer Review QA/QC

- ☐ Verify consistency with guidance for the specific building type identified.
- ☐ If the weighted average Building Type is assigned, (Com or Res) confirm if appropriate.
- ☐ If 'Any' is assigned, confirm if appropriate and that savings of the measure do not depend on building type.

Building Vintage

Measure Developer

Describes the construction of the building, which is typically limited to existing (Ex) or new (NC). However, existing buildings are representative of a weighted average of code-based vintage constructions. The term 'Any' should be used to describe cases where savings do not depend upon Vintage. (Note that a limited

Peer Review QA/QC

- ☐ Verify consistency with guidance: building construction existing (Ex) or new (NC) specified, for existing buildings specific building vintage or sub-vintage identified or "Any" used

TPP 9: Stage 2 Issues

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TPP 9: Stage 2 Issues

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- **Objective:** Ensure identified stage 2 deemed measures issues are identified, prioritized and addressed
 - Master, public list that emerged from Cal TF subcommittees and meetings
 - Key Questions: How should we:
 - ✦ Structure list?
 - ✦ Continue updating?
 - ✦ Prioritize updates?
 - ✦ Resolve updates?

TPP 9: List Structure

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No	Affected Use Category	Issue or Measure Affected	Issue Description	Approach to Issue Resolution	Resolve Before Submitting Consolidated Measure?	Decision Maker	Desire CPUC Staff Guidance to Address (Y/N)	New Data Collection/Update Analysis	High Impact Measure(s) Affected (Y/N)	Notes	Priority (H/M/L) w/reason	Owner	Status
1	Cross-Cutting	Early Retirement (ER) data requirements	Need a specific and reasonable description of what data is needed to support ER	Whitepaper	Y	CPUC Staff		None	Y	Since R4818 changed the baseline default to existing conditions rather than normal replacement, the idea of ER is more achievable for a program. However, viability and influence still must be proven, which requires :OE> without clear guidance on what should be included, the opportunity to claim greater existing conditions savings is still not being pursued.	High		Open
2	Cross-Cutting	Interactive Effects	Currently have 16 CA CZ's w/16 different values. In addition have different IE's in the same CZ based on IOU	Cross-Cutting	N	CPUC Staff	Y	New Data Collection	Y	Interactive effect factors are combined through a weighting process before they are applied to measures to reduce the number of interactive effects factors contained in the tables. In the process of weighting, some parameters like HVAC Type and Vintage are combined to reduce the size of the interactive effect factor list. However, the weighting process also creates PA-specific interactive effects by climate zone, which increases the size of the list.	High		Open
3	Cross-Cutting	Effective Useful Life (EUL) for Retrofit-Add On (REA) measures	Need guidance on acceptable method to use to arrive at REA EUL	Whitepaper	N	CPUC Staff	Y	None	Y	<p>This issue has precedence in a workbook given to SCE by the EAR team. They gave a decision on several measures in the attached file. The basic issue is described in the email string attached:</p> <p>The original RUL rule was created specifically for use with Early Retirement measures. In those cases, there is (legitimately) a concern that a Customer may be retrofitting their equipment near end of life. In those cases, there are good chances that the RUL will be more or less than 1/3*EUL.</p> <p>However, as we consider the new Installation Type of REA...the same rule was applied. Just considering customer decisions, an expensive add-on measure will not be installed on a system with a short expected life. I wonder if a life-cycle cost-analysis could suffice to show that projects with a payback of >1/3*EUL should use a life of EUL of equipment (not host), otherwise a reasonable customer would not have made this installation decision.</p> <p>I have heard another argument that code/ISP may kick in after a set number of year, but I think that if we "prove" that the expect life will be long, this would be a non-issue since code/ISP only matters if the host equipment must be change. Our argument is that the host equipment would not be changed.</p>	High		Open

Measure Consolidation/ eTRM Update

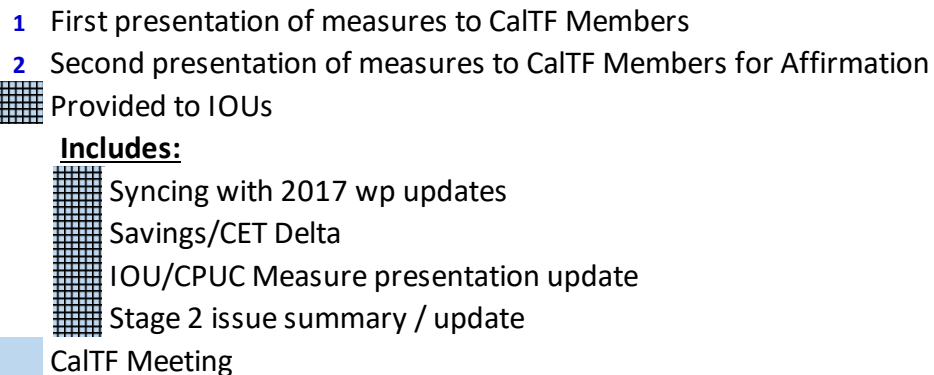
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Measure Consolidation Update

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Total Measures March 2018						
Measure Category	Total 2017	2018				
		Total 2018	2018 Q1	2018 Q2	2018 Q3	2018 Q4
Refrigeration	18	3	0	0	0	3
Food Service	15	1	0	0	0	1
Agriculture	2	5	5	0	0	0
Lighting	9	7	4	0	0	3
HVAC	0	48	0	12	33	3
Water Heating	19	5	4	1	0	0
Appliance or Plug Load	11	1	1	0	0	0
Building Envelope	0	4	0	4	0	0
Pools	0	4	0	4	0	0
Process	0	5	0	5	0	0
Miscellaneous	1	3	1	2	0	0
Totals:		75	86	15	28	33
						10 + ?*

- Q3 – Substantial completion of HVAC consolidation
- Q4 – 2019 / 20 DEER Updates and new measures

eTRM Update

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- eTRM development began in January, 2017
- Phase 1 was completed in August
 - Focused on measure entry and user interface
- Phase 2 underway
 - Includes version control, reports, subscriptions
 - Sprint 11 of 12 completed earlier this week
 - Final testing and acceptance begins late October
 - ✦ Testing completed by November 21
 - ✦ Fixes/Issues to be closed out by December 21
- Final product on schedule
 - Go-live by January 1, 2019
 - Training sessions to be scheduled early 2019
 - Additional features/functionality/needs have been identified during development and testing
 - ✦ 2019 list by end-of-November (goal)
 - ✦ would be considered as part of future workplan to be developed

- Measure Loading

- Consolidated measures being loaded concurrently with platform development and testing
- First 75 measures nearly complete
- Data loading has been more challenging than expected
 - ✦ Many more tables than originally envisioned
 - ✦ Very high permutation counts, exceeding 100,000 in some cases
- This work is being done in a separate eTRM instance
 - ✦ Ensures that platform testing and development does not impair loading process
 - ✦ Updated code and live data will be merged at end of phase 2 testing/acceptance phase

Closing

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Upcoming

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- 2018
 - Discussion/affirmation of HVAC measures
 - Planning for “Stage II” issues
 - Charter/Business Plan for Next Year
- 2019
 - Stage II Issues – Move forward
 - Discuss statewide modeling approach?
 - Review/incorporate custom equations into eTRM?
 - 3P measure review?
 - Other ideas?