2023 BP METRIC 3C: Develop a Stakeholder Communication Plan and Versioning Rules for Measure Package Updates

Metric 3C in the 2023 Cal TF Business Plan (BP) is to “Develop a Stakeholder Communication Plan and Versioning Rules for Measure Package Updates.” This draft workplan describes the proposed scope, schedule, and resource requirements for this BP activity.

# Problem Statement

The Commission has the goal of maintaining energy efficiency impacts in the data source of record to drive stability in implementation. Even with this goal, changes are periodically required that could drastically vary in scope, severity, and timing.

Corrections, additions, or even deletions regularly occur to support the implementation of energy efficiency measures in California. With the wide range of changes that can occur, the level of impact of each change can also vary widely. Some changes are fixed in time due to resolutions or code, and other changes can occur as new ideas are created.

When one couples the uncertainty caused by changes, the complexity of energy efficiency data, and the regulatory requirements to utilize the approved impacts, the need for a streamlined solution to communicate and interpret changes becomes clear.

# Goals, Metrics, and Objectives

Cal TF will identify and develop the process and/or tool enhancements to facilitate stakeholder communication and versioning of planned and completed measure package (MP) updates. The Cal TF solution will:

* Provide clear, accessible, and specific (where possible) information about the type and relative impact of planned, in progress, and completed measure package updates.
* Consider different options (e.g., format and frequency) to receive and access information to address different stakeholder needs and/or preferences.
* Help stakeholders identify and parse MP update information based on the type and/or impact of change.
* Establish and communicate clear versioning definitions and controls associated with different types of measure package updates.

## Stakeholder Benefits

Cal TF anticipates the following stakeholder benefits:

* **Transparency**, by improving stakeholder access and awareness to information regarding planned, in progress, and completed measure package updates.
* **Time and Cost Savings**, by providing stakeholders timely access to key EE measure information in customizable formats for varied stakeholder needs and avoiding miscommunications between groups.
* **Statewide Policy Consistency**, by establishing a versioning protocol for deemed measure updates and by setting expectations of how changes will be communicated.
* **Stakeholder Engagement**, by tailoring the solution to diverse stakeholder needs and preferences.

# Scope

Task 1. Define Existing Resources

Cal TF Staff compiled information about existing resources related to measure package information and identifying/understanding changes between measure package versions. The table below summarizes these existing eTRM resources.[[1]](#footnote-1)

|  |  |
| --- | --- |
| **Data Need** | **Current eTRM Functionality** |
| Measure Packages that are ending | Sunset measure list in eTRM Stats page |
| Measure Packages under review, approved, or rejected | Measure Package Review Summary report provides information on changes that are not yet finalized and published |
| Tailored list of published measure packages | Measure Reports can be live or scheduled to be sent directly to a user’s email at a regular frequency |
| Understanding the difference between two published measure versions | Version Comparison in eTRM Stats page captures a large variety of differences at the measure or offering level |
| Understanding detailed data about the published deemed measure | Downloading Permutation Data gives a base user the ability to manipulate the data in any way desired |
| Keeping your company’s system in sync with the Data Source of Record | APIs offer a mechanism to pull newly updated data into a system on any interval desire; filters are present to request changes only since a certain date  |

Task 2. Stakeholder Outreach

Cal TF will solicit input from Cal TF stakeholders (IOUs, POUs, CCA/RENs and implementers) on communication needs, including content, format, and timing to understand stakeholders’ goals and challenges with existing measure update information and notifications. Cal TF anticipates the following outreach efforts in addition to typical outreach to the Key eTRM Stakeholders:

* CCA/REN and POU focus groups, to understand specific stakeholder needs, existing practices, and preferences regarding measure package information and notifications.
* Presentation and discussion with CEDMC membership to understand implementer needs and preferences.
* Direct stakeholder outreach to understand how stakeholders access and utilize existing data and tools to create the views/summaries they need for planning and program efforts (e.g., PG&E spreadsheet to estimate impacts of MP updates).
* Online Stakeholder Survey (public) to collect baseline information, then periodically thereafter to measure progress.

Cal TF will use stakeholder feedback to define stakeholder needs and preferences including:

* What data are most important
* What format of data is most useful
* How to access and/or receive MP update information (e.g., live reports, eTRM dashboards, email notifications)
* When to receive MP update information (e.g., how frequently and/or by a certain date)
* How to ask questions or provide feedback on existing measures (e.g., to recommend changes to a current or future measure package, comment on validation data, or ask general questions)

Cal TF will compare stakeholder needs and preferences with existing resources, and—where no existing resources exist—will describe potential solutions to confirm stakeholder preferences.

Stage-gate: Cal TF will present this summarized information to stakeholders for input and confirmation.

Task 3. Develop Versioning Protocol for MP Updates

Cal TF will examine best practices for versioning and version controls to develop proposed versioning rules for consistency in tracking MP updates. The versioning rules will be based on the type and relative impact of MP changes (e.g., simple corrections, single value change, savings or C/E change) and consider stakeholder feedback on the relative importance of different types of changes and magnitude of impacts.

Stage-gate: Cal TF will present the versioning proposal to the TF for affirmation.

Task 4. Develop Proposed Solutions

Cal TF will identify and/or develop appropriate communication channels and schedule to notify statewide stakeholders of measure additions, updates, and retirements based on the stakeholder needs and preferences defined in Task 2.

## Deliverables

* Stakeholder survey for communication and data needs and preferences
* Proposed versioning protocol for measure package updates
* Proposed process and tool enhancements for stakeholder communication that can be prioritized for development
* Implemented enhancements (TBD)

## Potential Obstacles and Preliminary Solutions

* **Broad stakeholder input.** This BP activity is intended to support broad and diverse stakeholders, including many who are not actively engaged in Cal TF regular activities and resources. The initial outreach tasks will create multiple opportunities for input (including a public survey and direct outreach to different stakeholder groups). Cal TF Staff may request support from Cal TF membership to ensure robust input to define stakeholder needs and preferences.
* **Enhancement prioritization**. Proposed enhancements requiring eTRM development will be added to the eTRM Enhancements List and subject to annual prioritization activities to be scheduled and implemented. Substantial updates are expected to be initiated in Q4 of 2023. Prioritization should include this known need to keep stakeholders informed.

# Schedule

Cal TF anticipates completing the planning for this activity by the end of Q2, while the implementation of the recommendations will follow Key eTRM Stakeholder direction.

Key Milestones:

* Summarize stakeholder needs and preferences – **May 2023**
* Present/discuss proposed versioning protocol for measure package updates – **May 2023**
* Present/discuss proposed process and tool enhancements for stakeholder communication – **June 2023**

The implementation of selected process and tool enhancements will depend on the level of effort and Cal TF prioritization.

# Stakeholders and Team Members

Cal TF Staff will lead this initiative with input from key stakeholders, including: CPUC Staff, TF Members, and Cal TF stakeholders.

* Cal TF Staff Lead: Tomas Torres-Garcia
* TF Champions: TBD
* Cal TF stakeholders (including IOUs, POUs, CCAs RENs and implementers) will participate in discussions regarding notification needs and will provide input on the versioning and notification proposal.

**TF Members:** Cal TF Staff will solicit input from TF members regarding relevant regulatory updates (including guidance, decisions, and resolutions) that may impact existing or proposed measures or otherwise be of interest to Cal TF Stakeholders and the preferred format and frequency for summarized update information.

# Budget

Cal TF Staff will conduct this activity within the approved Cal TF budget.

# Affirmation

This workplan requires TF affirmation.

The TF affirmed this workplan on February 23, 2023.

1. Cal TF Staff presented this information at the January 2023 TF meeting, and the presentation is available on the Cal TF website: [Existing Measures Communication Plan PPT](http://www.caltf.org/s/Existing-Measure-Comm-Plan_Cal-TF-Mtg-01-26-23-r3-lkna.pdf). [↑](#footnote-ref-1)