

# 2023 Business Plan: Q1 Progress Update



**APRIL 2023**

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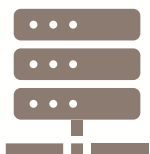
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- Business Plan Goals
- Q1 Highlights
- Emerging Issues/Opportunities
- Progress Update by BP Goal
- Budget Status

# 2023 Business Plan Goals

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## Cal TF 2023 Business Plan



Goal 1: Administer software development of eTRM v2.x



Goal 2: Ongoing Implementation of Current eTRM Version



Goal 3: Manage Existing Measure Updates



Goal 4: Manage and Implement the Statewide New Measure Development Process



Goal 5: Develop POU and Statewide Custom Measures



Goal 6: Identify, Analyze, and Recommend Key Emerging Technical and Technical Policy Issues in a Statewide Consistent Way



Goal 7: Manage the Cal TF and Cal TF PAC

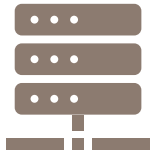


Goal 8: Develop and Manage the Cal TF Roadmap, Business Plan, and Budget

# Q1 Highlights

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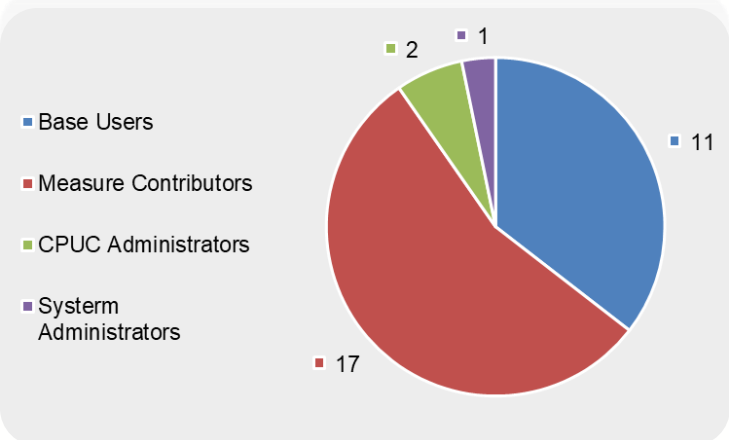
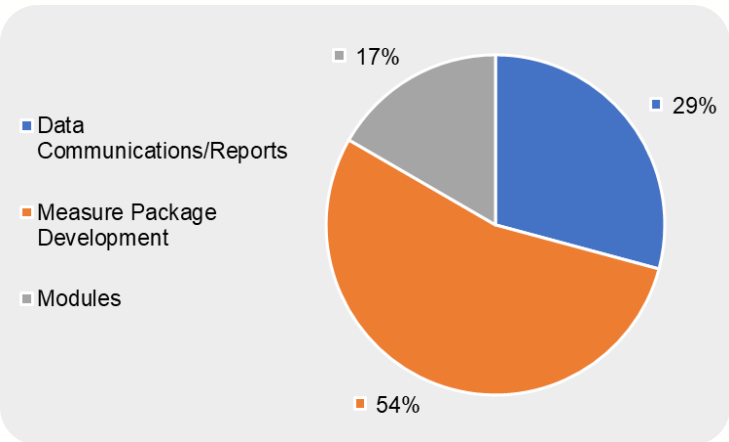
- eTRM Enhancement Charette (1C)
- Measure Update Communication Strategy (3C)
- New Measure Acceleration Strategy (4A)
- New Measure Activity (4B)
- Custom Initiative (5X)
- Cal TF 5-year Roadmap (8A)
- 3 Workplans, Procedure/Template Affirmed (8C)



# eTRM Enhancement Charette (1C)

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- Priority Enhancement Types
  - Decrease time, increase quality
  - Improve transparency, visibility
  - Leverage and extend capabilities; improve user experience
- Enhancement Charette
  - 29 attendees (10 in-person; 19 online)
  - 25 survey responses\*
- Next Steps
  - Present priority items to eTRM funders
  - Develop release schedule



\* Users can have multiple user types (e.g., a base user can also be a measure contributor)



# Measure Package Communication and Versioning Plan (3C)

6

- Stakeholder outreach (*blue italics - conducted through April*)
  - IOUs
    - ✦ *PG&E*
    - ✦ SCE
    - ✦ SDG&E
    - ✦ SCG
  - POUs
    - ✦ *LADWP*
    - ✦ NCPA/ SCPPA
  - CPUC / EAR Team
  - Evaluators
    - ✦ DNV
    - ✦ Quantum
  - Implementers
    - ✦ *Energy Solutions*
    - ✦ *Cascade*
    - ✦ TRC
    - ✦ Willdan
    - ✦ AESC
  - Implementers (cont)
    - ✦ Synergy
    - ✦ ERI
    - ✦ CLEAResult
    - ✦ Frontier
    - ✦ RMS
    - ✦ Ecology Action
    - ✦ ICF
    - ✦ Lincus/Solris
- Enhancement Development
  - 2023 – Business and Functional Requirements
  - 2024 – Enhancement Implementation

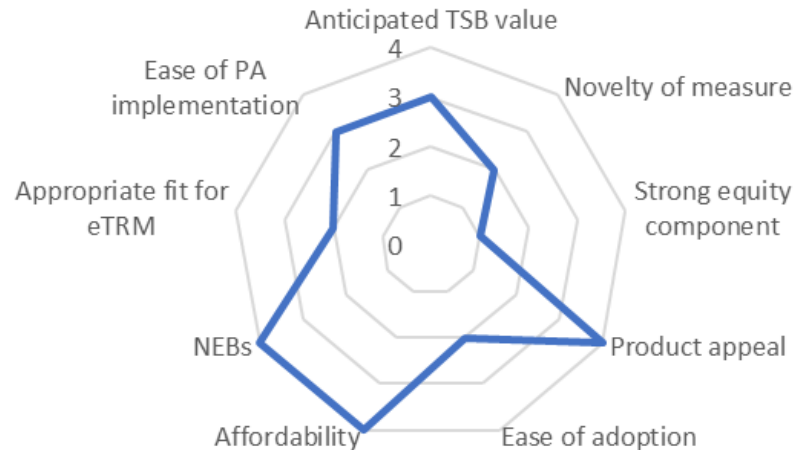


# New Measure Scorecard (4A)

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	40%			35%				25%	
	Category 1: Measure impact (40% of total)			Category 2: Customer appeal (35% of total)				Category 3: Measure viability (25% of total)	
0=low 4=high	Anticipated TSB value	Novelty of measure	Strong equity component	Product appeal	Ease of adoption	Afford- ability	NEBs	Appropriate fit for eTRM	PA portfolio fit
Weight within category	50%	20%	30%	25%	20%	30%	25%	50%	50%
Total weight	20.00%	8.00%	12.00%	8.75%	7.00%	10.50%	8.75%	12.50%	12.50%

## Sample Technology



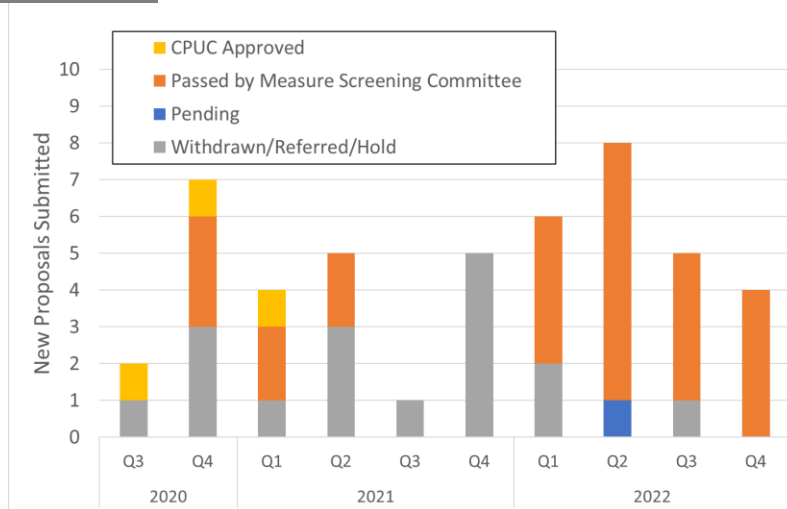


# New Measure Activity (4B)

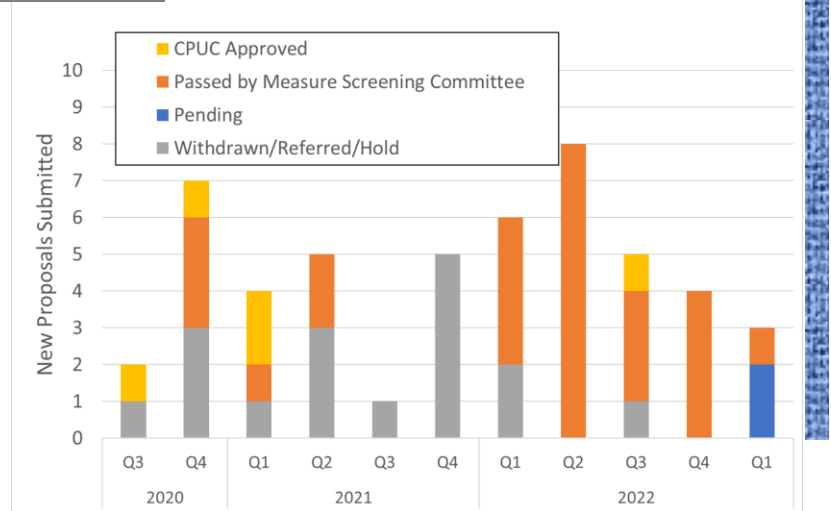
8

- Proposed Decision on Gas Incentives
  - Driving need for non-exempt gas measures
  - Gap Analysis from other leading jurisdictions (Res and NonRes candidates)
- We will feed many more measures into the process
  - Development and approval will need support

Q4 - 2022 New Measure Status



Q1 - 2023 New Measure Status



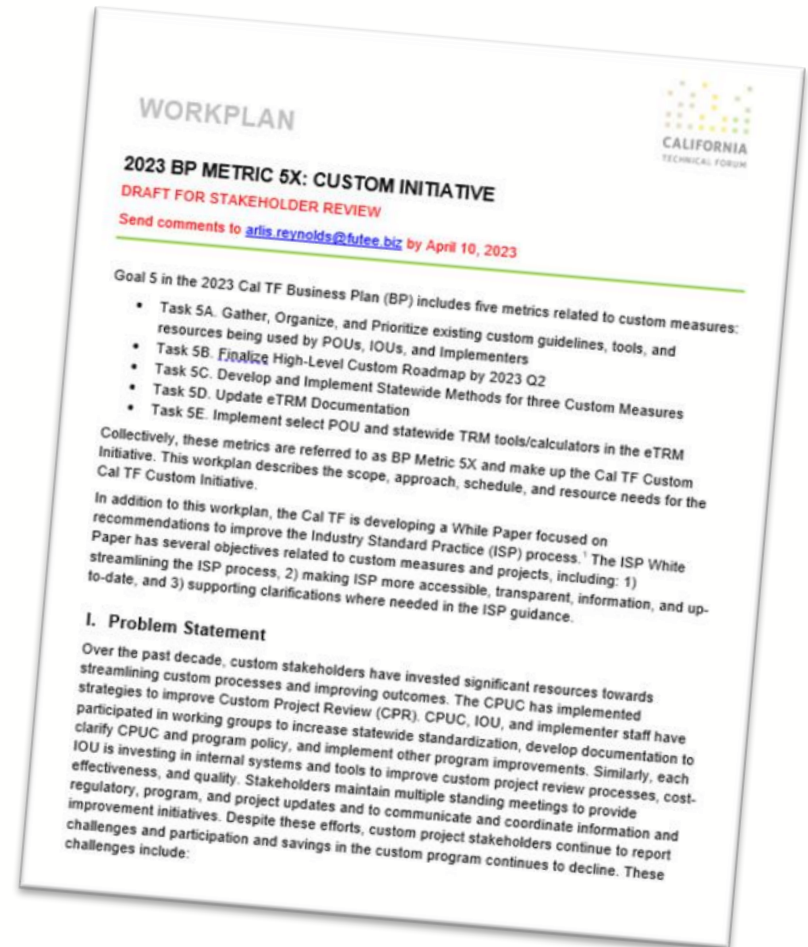




# Custom Initiative Workplan (5X)

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- Stakeholder Outreach
  - Custom Subcommittee
  - Cal TF
  - CPUC CPR
  - SW Custom Coordination
  - CEDMC
- Revised Workplan for TF Affirmation





# eTRM Custom Library (5E)

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**eTRM**  
OFFICIAL SOURCE  
CA Energy Efficiency  
Measure Data

HOME  
MEASURES  
SHARED DATA  
CPUC SUPPORT TABLES  
A IMPLEMENTATION CODES  
MEASURE DATA PROPERTIES  
eTRM STATS  
CUSTOM LIBRARY  
USER GUIDE

## Custom Library

### Calculation Tools

Calculation tools are files used to calculate savings for custom measures.

**Boiler Load Balance and Scorecard Tool**  
Excel workbook to determine boiler load factor

**Chiller Workbook**  
To be used in measures related to chiller system upgrades

**DOE MEASUR Calculators**  
External weblink to DOE's suite of MEASUR calculators

**HVAC Tool**  
Excel workbook for calculating savings for multiple HVAC measures on CHW, HW, and air-side systems (also known as the PG&E HVAC Tool)

Host tools and templates, and other resources

Link tools and resources to Custom Measures

Leverage version control, workflow, and message log features



# eTRM Custom Measures (5E)

The screenshot shows the eTRM Custom Measures interface for a "Chiller System Upgrade". At the top, there is a status bar with "DRAFT", "Dec 1, 2022 1:00 PM", and links for "Version History" and "Measure Log". Below the title, there are tabs for "CHARACTERIZATION", "DEPENDENCIES", "SUPPORTING DATA", "CALCULATIONS", "PERMUTATIONS", and "SUBSCRIPTIONS". The "CHARACTERIZATION" tab is active.

**Measure Details**

MEASURE TYPE	SOURCE DESCRIPTION
Custom	CMAP001-01-1

MEASURE ID	USE CATEGORY
CMAP001	AP - Appliance or Plug Load

MEASURE NAME	EFFECTIVE DATE
Chiller System Upgrade	January 1, 2023

**Measure Package**

The Measure Package includes: CSV files of parameters, value tables, permutation table and reference files, a PDF of the characterization, as well as the measure JSON file (JavaScript Object Notation, a text file format used for structured data).

[Download Measure](#)

Or you can download a PDF of the characterization only, separate from the full Measure Package.

[Characterization PDF](#)

**Table of Contents**

Technology Summary	Electric Savings (kWh)	Measure Case Labor Cost
Measure Case Description	Peak Electric Demand Reduction (kW)	Net-to-Gross
Base Case Description	Gas Savings (Therms)	Gross Realization Rate (GRR)
Code Requirements	Life Cycle	Non-Energy Impacts
Program Requirements	Base Case Material Cost	DEER Differences Analysis
Program Exclusions	Measure Case Material Cost	
Data Collection Requirements	Base Case Labor Cost	

Host measure-specific guidance on eligibility, savings methods, key parameters, etc.

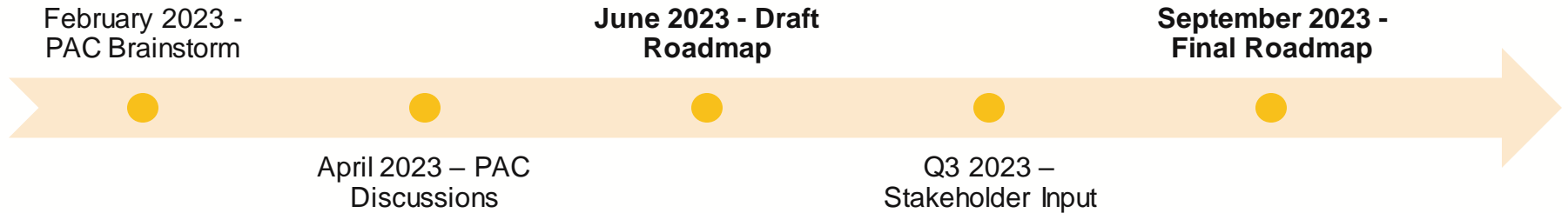
Link to custom tools, templates, and resources

Leverage version control, workflow, and message log features



# Cal TF 5-year Roadmap (8A)

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- Feb – PAC, TF, Stakeholder Brainstorms
- Mar – TF/Stakeholder initial rating of activities
- Apr – Continue brainstorming, priorities, scoping, and sequencing



# Roadmap Goals (Draft) (8A)

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## Baseload Activities

- eTRM Management and Development
- Measure Management
- Technical Policy Analysis & Recommendations
- Stakeholder Engagement

## Strategic Initiatives

- Data Integration & Analytics
- Custom Initiative
- New Measure Development and Updates
- “All Source” eTRM
- eTRM Extension

# Emerging Issues/Opportunities

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- Measure Development/Updates
- CPUC Proposed Decision on Gas Incentives
- Transition to Total System Benefit (TSB)
- POU Engagement

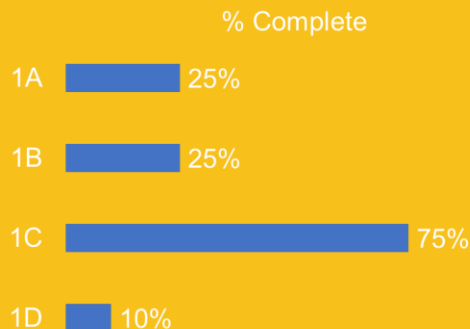
# 2023 Business Plan: Q1 Progress Update



**APPENDIX A: PROGRESS UPDATE BY  
BUSINESS PLAN GOAL AND METRIC**

## Goal 1 Metrics

Administer software development of eTRM v2.x

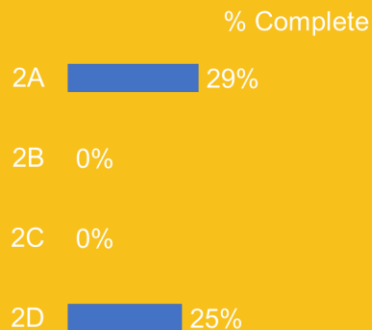


- 1A. Implement enhancements for eTRM v2.x
  - eTRM 2.5 release (March)
  - eTRM 2.5.1 alignment with CET
- 1B. Document eTRM technical guidance
  - Performance Metrics are being tracked with each release
- 1C. Complete eTRM enhancement prioritization in 2023 Q2
  - Compiled, organized > 200 enhancement requests from eTRM users and other stakeholders
  - March 22nd – Hosted in-person eTRM Enhancement Charette; received 25 survey responses
- 1D. Socialize and Implement eTRM 2023 enhancements
  - Draft release schedule is being developed
  - Socialize the Key Stakeholder meetings, Cal TF meeting and Cal TF website



## Goal 2 Metrics

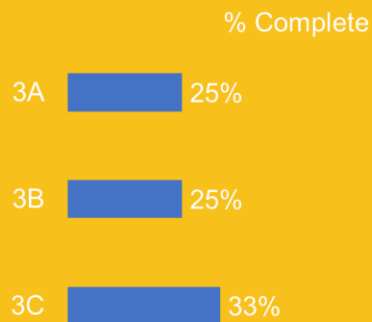
Ongoing  
Implementation of  
Current eTRM Version



- 2A. Complete up to six (6) webinar trainings for various stakeholder user groups
  - Measure Developer Training Plan
  - Measure Property Data Training
  - Planning eTRM training for base uses
    - ✦ All Base Users
    - ✦ POU Users
    - ✦ eTRM 101 for Custom Stakeholders
- 2B. Conduct post-training survey
- 2C. Governance: Finalize eTRM Governance Plan with eTRM Key Stakeholders
- Cal TF Staff will track Google Analytics monthly to understand and track eTRM usage.
  - Reports available upon request; not posted
  - We want to track, but not make it public

## Goal 3 Metrics

Manage Existing  
Measure Updates

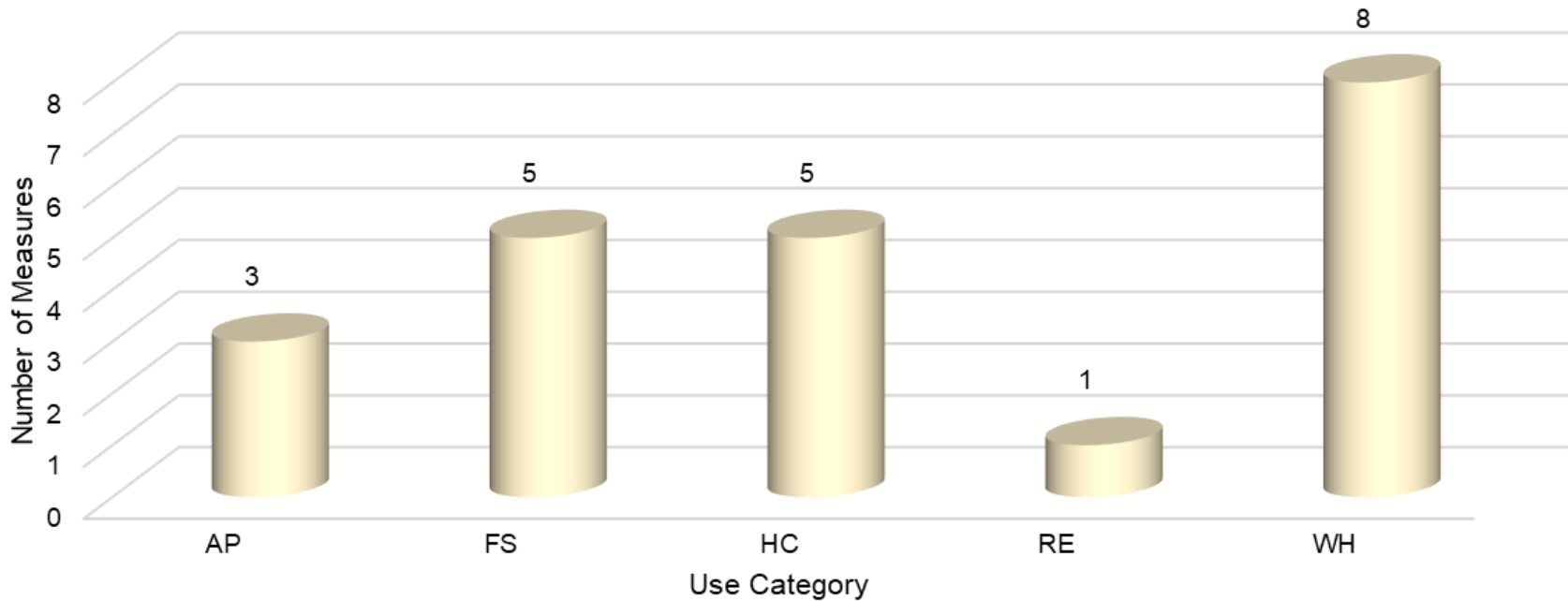


- 3A. Track and report metrics for existing measure updates
  - 29 measure packages in process
  - Tracking of hours is not currently reliable
  - Status report tracking planned through enhancement
- 3B. Coordinate monthly statewide meetings on new/updated measures for the Statewide Deemed Measure List
  - Monthly reports on website
  - Proposed enhancement to automate report
- 3C. Develop a Stakeholder Communication Plan and Versioning Rules for Measure Package Updates
  - TF affirmed [3C Workplan](#) on 2/23
  - Stakeholder outreach/engagement

# Measure Package Activity

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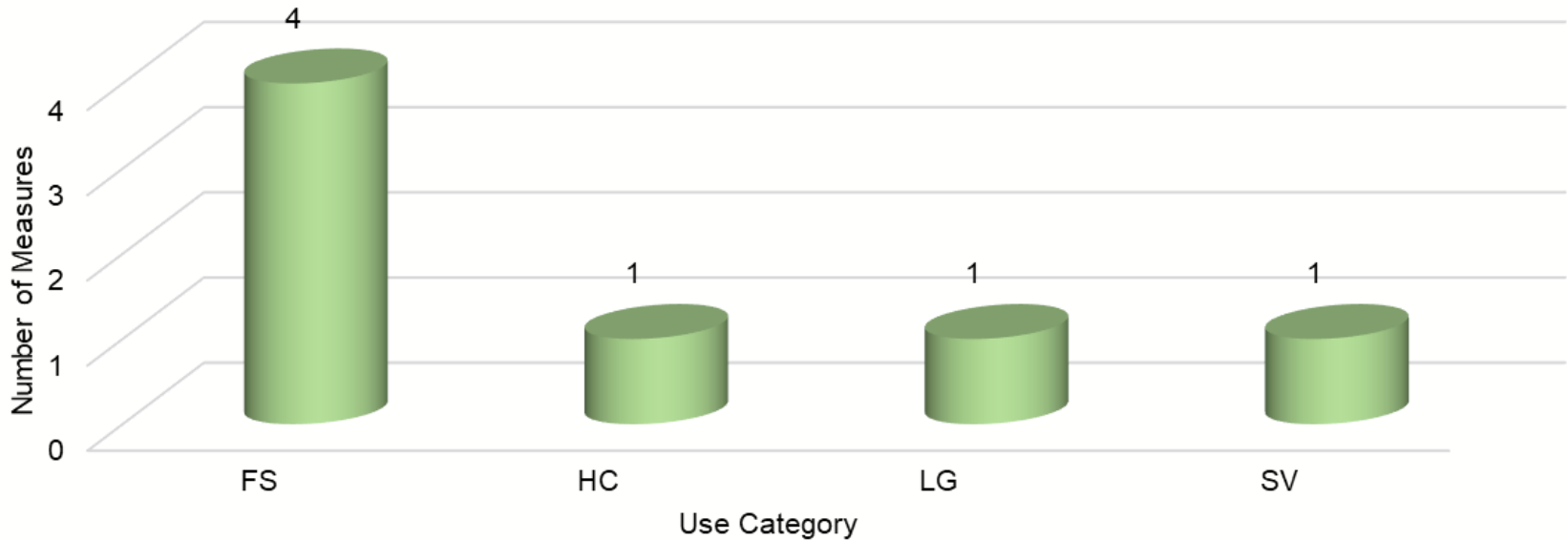
- Number of measure updates in the eTRM



# Measure Package Activity

20

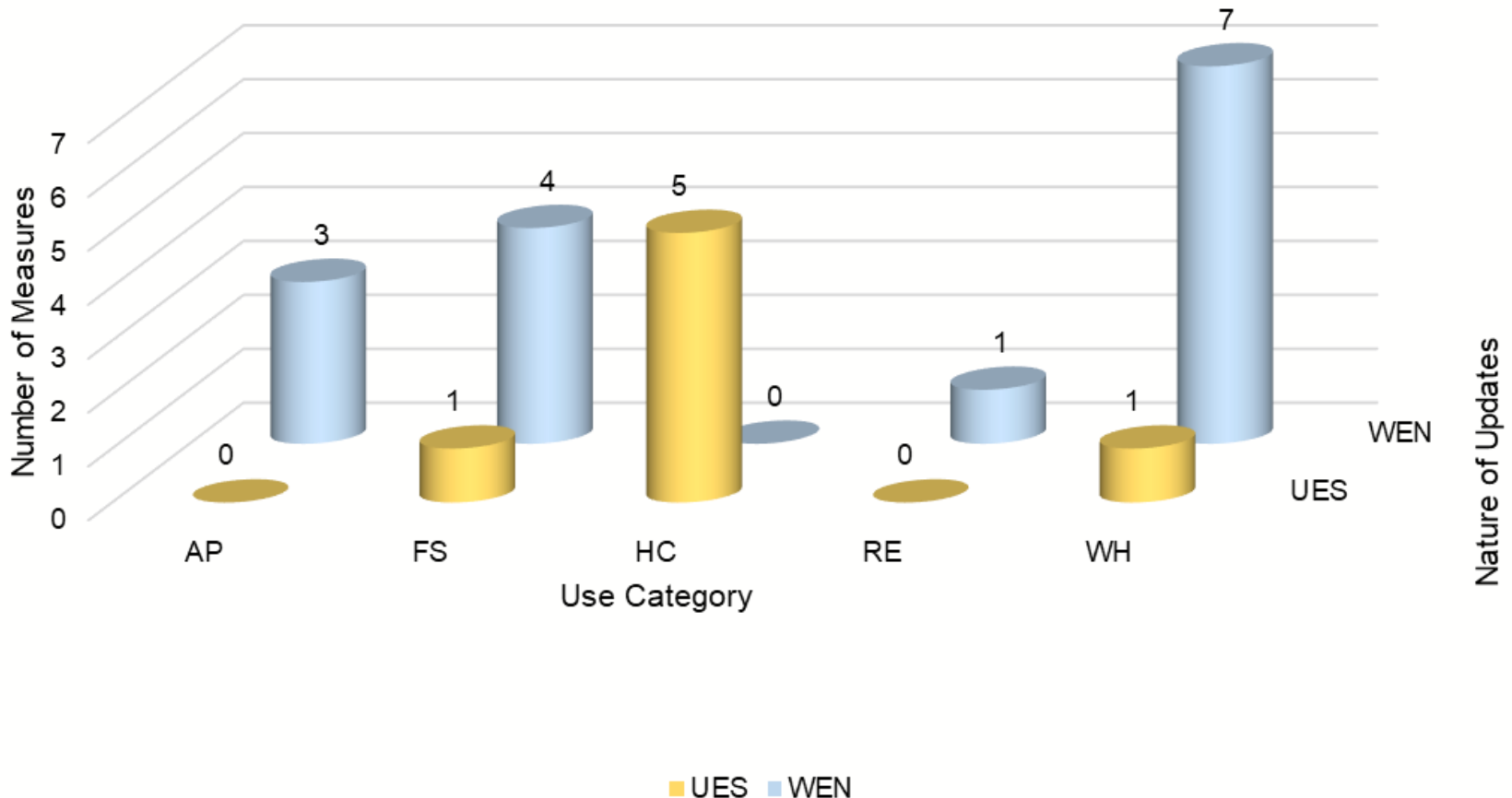
- Number of new measures in the eTRM



# Measure Package Activity

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- Nature of Updates

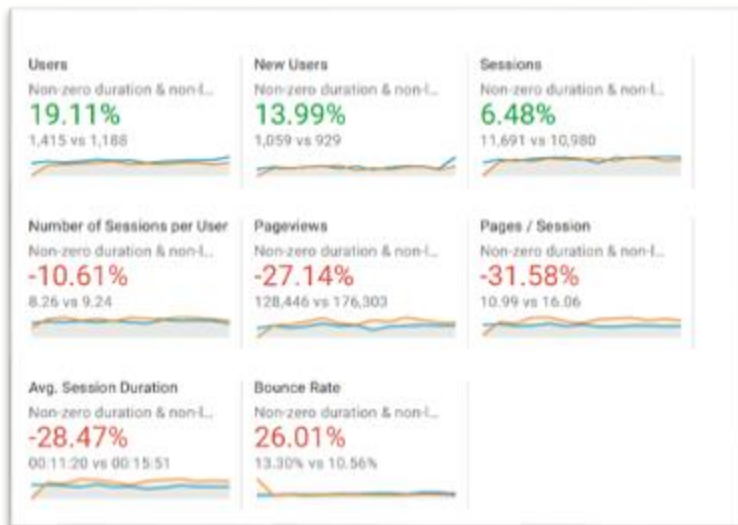


# eTRM Analytics (1 of 2)

22

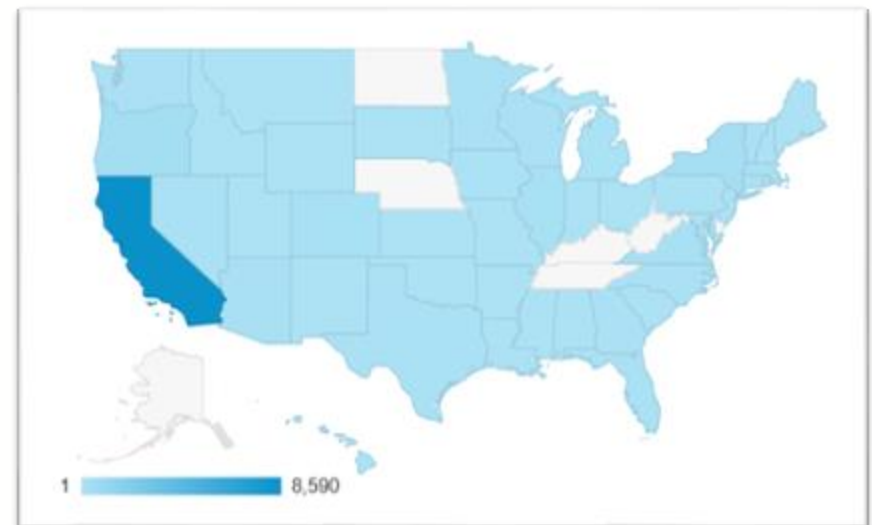
## Usage

- Analyze the foot traffic and users' engagement



## User Demographics

- Track where users are logging in from and their activities. This can potentially help to identify bots.



# eTRM Analytics (2 of 2)

23

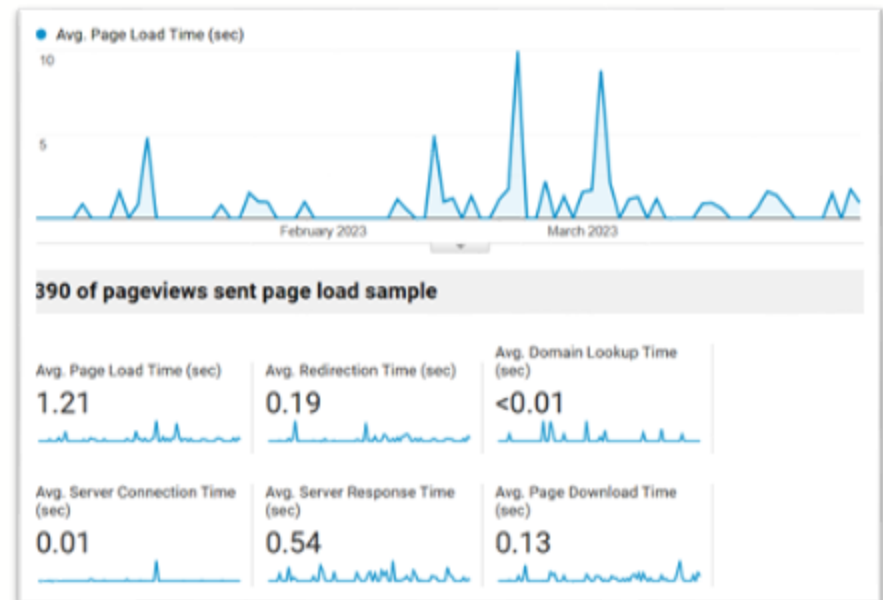
## Technology

- Document the different browsers and devices being used, allowing Cal TF Staff to test for eTRM compatibility.

		Total	
Device Category	Browser	Sessions	Users
2. desktop	Chrome	9,078	2,606
3. desktop	Edge	4,180	648
4. desktop	Firefox	404	135
5. desktop	Internet Explorer	4	3
6. desktop	Mozilla Compatible Agent	8	8
7. desktop	Netscape	2	2
8. desktop	Opera	1	1
9. desktop	Safari	79	48
10. mobile	Chrome	111	88

## eTRM Performance

- Monitor crash reports and site speeds, ensuring reliability.



## Goal 4 Metrics

Manage and Implement  
the Statewide New  
Measure Development  
Process

% Complete

4A 25%

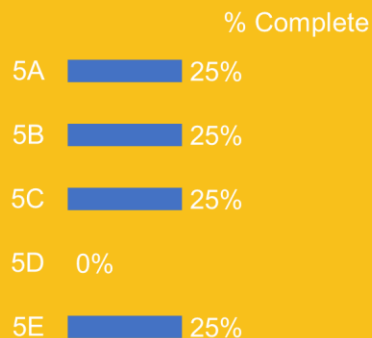
4B 25%

- 4A. Develop and Implement Measure Identification Strategy
  - TF affirmed [4A Workplan](#) on 2/23
  - Developed new measure scorecard; adapted to TSB based on stakeholder input
  - Identified 20 organizations for initial outreach



## Goal 5 Metrics

### Custom Initiative



- Custom Initiative
  - Presented Draft 5X Workplan to TF, CPUC, CEDMC
  - Presenting Revised [5X Workplan](#) on 4/27
  - Proposed TPP Topic: Custom Initiative (for 4/28 PAC Discussion)
  - Outreach/engagement with CPUC Custom team
- 5A. Gather, organize, and prioritize existing custom guidelines, tools, and resources being used by POU, IOUs, and implementers
  - 5A-1: Compiled/organized custom policy and guidance documents
  - 5A-2: Initial presentation on SW Custom Measure Code structure
  - 5A-3/4: Data requests to compile custom measure lists and tools
- 5B. Finalize High-Level Custom Roadmap
  - Working list of challenges and improvement recommendations
- 5C. Develop and implement statewide methods for at least three (3) custom measures
  - Steam Boilers (and AOE) – in Custom Subcommittee review
  - Chiller System Upgrade
  - Retrocommissioning
  - Pump Systems
  - VFD on HVAC Fans
- 5D. Update eTRM documentation (ongoing, as needed)
- 5E. Implement select POU and statewide tools/calculators in the eTRM
  - Final design and functional specifications for “Phase 1” (eTRM Custom Library and eTRM Custom Measures)



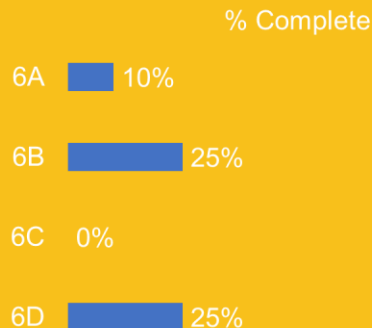
# Custom Initiative Workplan (5X)

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- 5A. Gather, Organize, and Prioritize existing custom guidelines, tools, and resources being used by POU, IOUs, and Implementers
  - 5A-1 – Custom Regulatory Summary
  - 5A-2 – Statewide Custom Measure ID
  - 5A-3 – List of Measures for Statewide Methods (and Hybrid Opportunities)
  - 5A-4 – List of Custom Tools
- 5B. Finalize High-Level Custom Roadmap
- 5C. Develop and Implement SW Methods for at least three Custom Measures
  - 5C-1 – Statewide Custom Measures
  - 5C-2 – Custom Measure Package Develop/Update Workflow
- 5D. Update eTRM Documentation
- 5E. Implement select POU and statewide TRM tools/calculators in the eTRM
  - 5E-1 – eTRM Custom Phase 1 (Custom Library and Custom Measures)
  - 5E-2 – Additional eTRM Custom Modules
- 6B: White Paper on Industry Standard Practice (ISP)

## Goal 6 Metrics

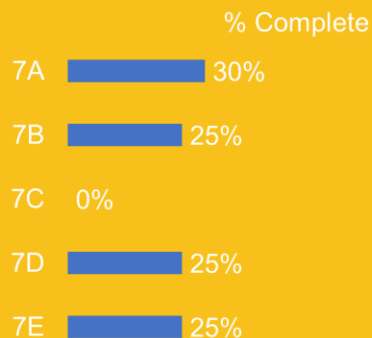
Identify, Analyze, and Recommend Key Emerging Technical and Technical Policy Issues in a Statewide Consistent Way



- 6A. Develop at least one TPP
  - Discussed/deferred TPP on data integration
  - Proposed new topic: Custom Initiative
- 6B. Develop at least one white paper
  - [TF Survey of White Paper Topics](#)
  - Industry Standard Practice (ISP) White Paper
    - ✦ Topic affirmed by TF in January
    - ✦ ISP Subcommittee formed; in progress
    - ✦ 6C. Review and update existing Cal TF documentation, as needed
- 6D. Provide relevant regulatory updates to support Cal TF membership in staying informed with regulatory requirements
  - TF affirmed [6D Workplan](#) on 2/23
  - Coordinating with CPUC; discussing options for “living rulebook”
  - Exploring eTRM features to facilitate transparency, access, direct connections with Measure Packages

## Goal 7 Metrics

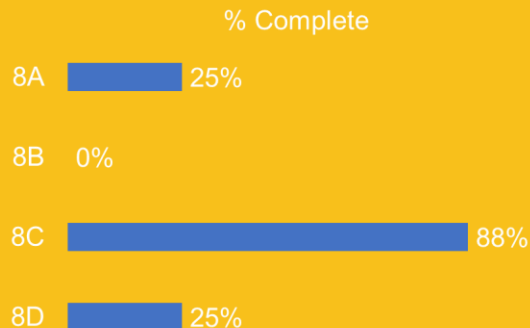
Manage the Cal TF and  
Cal TF PAC



- 7A. Conduct at least ten TF meetings
  - In progress
- 7B. Conduct subcommittee meetings
  - Deemed Measure Property Data Subcommittee
  - Custom Subcommittee
  - ISP White Paper Subcommittee
- 7C. Review and Discuss Cal TF Governance Model, current practice
- 7D. Conduct four PAC meetings; ad hoc meetings as needed
  - In progress
- 7E. Maintain Cal TF website and update and post all materials
  - In progress

## Goal 8 Metrics

Develop and Manage the Cal TF Roadmap, Business Plan, and Budget



- 8A. Develop 5-year Roadmap
  - In progress; draft Roadmap in June
- 8B. Develop and finalize the 2024 Cal TF BP and budget
- 8C. Develop workplans for projects for projects or initiatives as required in the BP
  - PAC and TF affirmed [Workplan Procedure](#) and [Workplan Template](#)
  - TF affirmed **3** workplans
    - ✦ [3C Stakeholder Communication Plan and Versioning Rules for Measure Package Updates](#)
    - ✦ [4A New Measure Identification Strategy](#)
    - ✦ [6D Regulatory Updates to Support Cal TF Membership](#)
- 8D. Provide quarterly status updates to the PAC on business plan and budgets
  - [2022 BP Annual Report](#)
  - 2023 BP, Q1 Progress Update (this document)