

2023 Business Plan: Q2 Progress Update



JUNE 2023

Contents

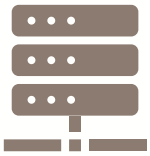
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- Business Plan Goals
- Q2 Highlights
- Emerging Issues/Opportunities
- Appendix: Progress Update by BP Goal

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

Q2 Highlights

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- Gas Incentive Decision D-23.04-035 (3A)
- New Measure Activity (4B)
- Measure Update Communication Strategy (3C)
- Custom Initiative (5X)
- Cal TF 5-year Roadmap (8A)

Gas Incentive Decision (D.23-04-035)

- Decision to restrict “non-exempt” permutations and promote “exempt” permutations
 - “non-exempt” = a permutation that burns natural gas
 - ✦ For example: furnace or water heater
 - “exempt” = a permutation that does not burn natural gas but saves natural gas
 - ✦ For example: aerator or wall insulation
- Ordering Paragraph (OP) 2
 - Document TRC for all new construction, non-exempt permutations
- OP-4
 - Identify submission timelines for new exempt measure packages

Gas Incentive Decision (D.23-04-035)

- Facilitated PA working group (IOUs, CCAs, and RENs)
- OP-2: Consensus approach of calculating TRC for non-exempt NC permutations

MeasureVersionID	MeasureName	# of MeasureDetail	% of Total	# of MeasureDetail	% of Total	# of MeasureDetail	% of Total	Total
SWP017-03	Oven, Gas, Residential	96	100.00%					96
SWP0211-02	Flatpack, Commercial	730	89.18%	4	0.54%	2	0.27%	736
SWP0243-01	Multiple Capacity Unitary Air-Cooled Commercial Air Conditioners Between 0.5 and 240 MBtu/h	1310	88.99%	730	12.99%	12	0.82%	1472
SWP0204-03	Pool Heater, Residential	60	85.70%	4	5.20%			64
SWP0432-01	Solar Thermal Water Heating System, Residential	48	100.00%					48
SWP0003-02	Combustion Oven, Commercial			27	100.00%			27
SWP0004-01	Griddle, Commercial			9	100.00%			9
SWP0005-03	Steamer, Commercial			9	100.00%			9
SWP0006-01	Comayer Oven, Gas, Commercial			9	100.00%			9
SWP0211-05	Range, Commercial			18	100.00%			18
SWP0217-02	Automatic Compressor Broken, Commercial			18	100.00%			18
SWP0219-02	Underfeed Boiler, Commercial			9	100.00%			9
SWP0220-01	Cooking, Commercial			9	100.00%			9
SWP0201-06	Boiler, Commercial			6402	100.00%			6402
SWP0206-07	Trillion Water Heater, Commercial			12480	100.00%			12480
SWP0210-02	Boiler, Multifamily			96	100.00%			96
SWP0211-02	Central Storage Water Heater, Multifamily			96	100.00%			96
SWP0213-03	Trillion Water Heater, Residential			21	1.62%	1131	88.32%	1152
SWP0233-02	Gas Heat Pump Water Heater, Multifamily			32	100.00%			32
SWP0203-04	Clothes Dryer, Residential	141	73.49%	3	1.56%	48	25.00%	192
SWP0201-01	Combustion Oven, Commercial			9	16.67%	15	83.33%	18
SWP0214-02	Black Ovens, Gas, Commercial			9	33.33%	12	66.67%	18
SWP0204-05	Space Heating Boiler, Commercial & Multifamily	1432	28.47%	832	16.37%	2776	55.00%	3040
SWP0213-05	Unitary Air-Cooled Air Conditioners, Over 65 MBtu/h, Commercial	5426	64.47%	2054	24.47%	936	11.27%	8416
SWP0214-03	Unitary Air-Cooled Air Conditioners or Heat Pumps, Under 65 MBtu/h, Commercial	4084	27.74%	4221	28.67%	6876	43.50%	14720
SWP0211-05	Range, Residential	648	76.00%	54	6.25%	162	18.75%	864
SWP0247-03	Gas Trillion, Residential			24	12.50%	168	87.50%	192
SWP0248-03	Packaged Air Conditioner Heat Recovery, Commercial			6	12.50%	42	87.50%	48
SWP0249-03	SEER-Rated AC and HP in HVAC Equipment, Residential	1633	85.00%	150	7.81%	137	7.18%	1920
SWP0203-03	Heater for Hot or Taps, Commercial and Multifamily	345	84.29%	357	85.71%	78	19.00%	780
SWP0207-05	Storage Water Heater, Commercial	3039	37.00%	330	3.71%	1985	22.31%	5354
SWP0472-03	Storage Water Heater, Residential	603	34.00%	780	45.14%	345	19.87%	1728
SWP0230-01	Trillion Compressor Space and Water Heater, Residential	6	12.50%	36	68.75%	20	37.25%	64
Total		20263	88.42%	9054	13.56%	37907	54.01%	66024

- Memo created to support 6/13/2023 (60-day) response requirement
- Visualization tool to understand the data
 - TRC < 1.0 (5 measures)
 - TRC >= 1.0 (14 measures)
 - TRC result mixed (14 measures)



New Measure Activity (4B)

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- OP-4: Decision on Gas Incentives
 - Driving need for exempt gas measures
 - Gap Analysis from other leading jurisdictions (Res and NonRes candidates), equity program needs, ET programs
 - Proposed list of exempt measure packages:
 - **PG&E**
 - Efficient Doors, Residential
 - Efficient Doors, Small Business
 - Door sweeps / Sealing, Residential
 - Door sweeps / Sealing, Small Business
 - **SCE**
 - High eff windows, Residential
 - High eff windows, Small Business
 - **SCG**
 - Weather sealing / infiltration, Residential
 - Weather sealing / weather stripping, Small Business, Schools, and other Commercial Properties
 - **SDG&E**
 - Duct Seal, Residential
 - Duct insulation and/or sealing, Small Business



Measure Package Communication and Versioning Plan (3C)

- Stakeholder outreach (*blue italics - conducted through May*)

- 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/Solaris

- Enhancement Development

- 2023 – Business and Functional Requirements
- 2024 – Enhancement Implementation



Custom Initiative (5X)

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- TF Affirmed [Custom Initiative Workplan](#)
- In Progress
 - Custom Resource Library
 - Custom Tools Library
 - Custom Measure List
 - Custom Measure Package and Tool Development Workflow
- Custom Stakeholder Engagement
 - Custom Subcommittee Meetings
 - Custom Measure Package Working Groups
 - ISP White Paper Working Group
 - SW Custom Coordination Meeting
 - Monthly CPUC Custom Check-In

SW Custom Measures

- ✓ Steam Boiler (+AOE)
- ✓ RetroCx
- ✓ Chiller Systems
- ✓ Pump Systems



Cal TF 5-year Roadmap (8A)

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

Emerging Issues/Opportunities

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- Measure Property Data effort delayed due to Gas Decision support
- Low Income engagement to support consolidated ESA measures

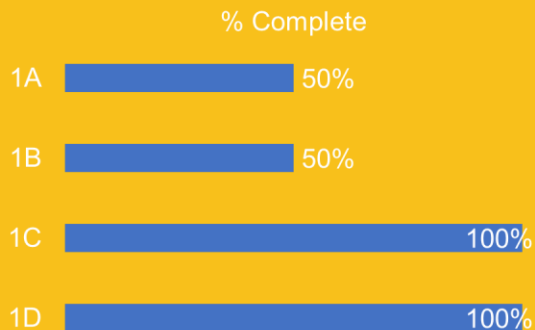
2023 Business Plan: Q2 Progress Update



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

Goal 1 Metrics

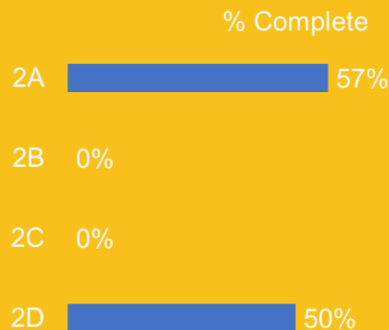
Administer software development of eTRM v2.x



- 1A. Implement enhancements for eTRM v2.x
 - eTRM 2.5.0 release (March)
 - eTRM 2.6.0 alignment with CET (May)
- 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
 - April – Cal TF meeting to socialize final enhancement list
- 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
 - eTRM 2.7.0, Sprint 21 underway (eTRM cover sheet and measure data comparisons)

Goal 2 Metrics

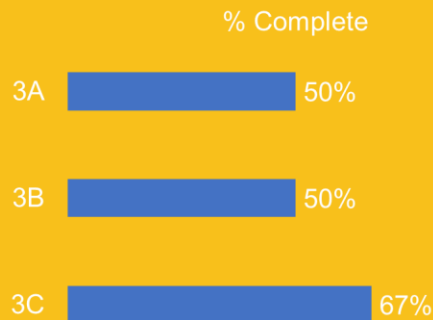
Ongoing
Implementation of
Current eTRM Version



- 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
 - Cost fact sheet training (PAs and CPUC)
- 2B. Conduct post-training survey
- 2C. Governance: Finalize eTRM Governance Plan with eTRM Key Stakeholders
- 2D. Cal TF Staff will track Google Analytics *quarterly* to understand and track eTRM usage.
 - Reports available upon request; not posted
 - We want to track, but not make it public

Goal 3 Metrics

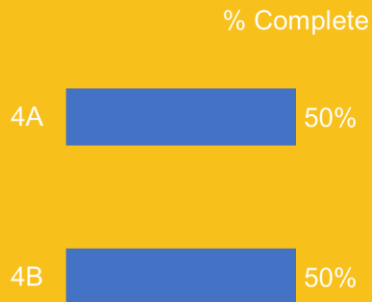
Manage Existing
Measure Updates



- 3A. Track and report metrics for existing measure updates
 - 14 measure packages completed
 - 20 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

Goal 4 Metrics

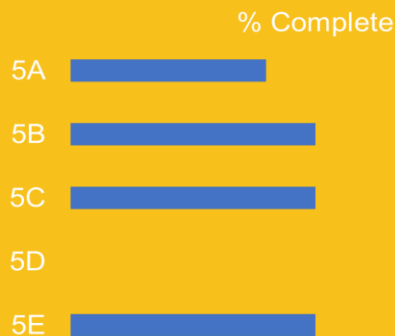
Manage and Implement the Statewide New Measure Development Process



- 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
 - Gap analysis from other TRMs supported new exempt measure process
 - Coordination with CalNEXT and GET to support MFm REN programs

Goal 5 Metrics

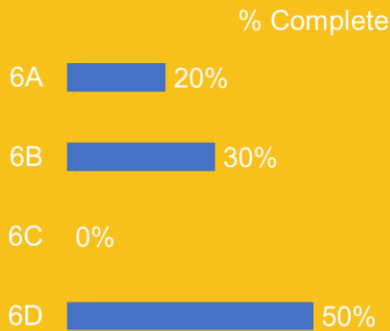
Custom Initiative



- Custom Initiative
 - TF Affirmed Custom Initiative Workplan 4/27
 - PAC Affirmed TPP Topic: Custom Initiative on 4/28
- 5A. Gather, organize, and prioritize existing custom guidelines, tools, and resources being used by POUs, IOUs, and implementers
 - 5A-1: Developing Custom Resource Library
 - 5A-2: Developing updated Custom Measure Code list
 - 5A-3: Received PA data on custom measures; analyzing to develop custom measure list for SW hybrid and custom measures
 - 5A-4: Developing Custom Tool Library
- 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) – for TF affirmation in July
 - 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
 - Scoping additional eTRM Custom Modules

Goal 6 Metrics

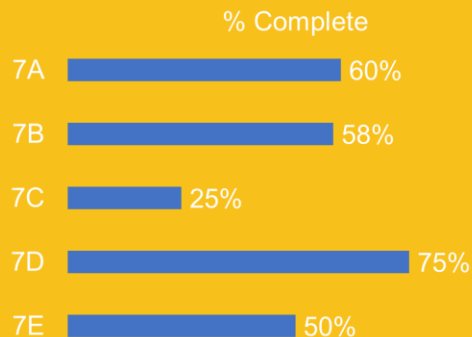
Identify, Analyze, and Recommend Key Emerging Technical and Technical Policy Issues in a Statewide Consistent Way



- 6A. Develop at least one TPP
 - Discussed/deferred TPP on data integration
 - Affirmed topic: Custom Initiative
- 6B. Develop at least one white paper
 - Industry Standard Practice (ISP) White Paper
 - ✦ Data collection in progress
 - ✦ June – Stakeholder Survey
 - ✦ Disposition template and database recommendations
- 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
 - Coordinating with CPUC; scoping eTRM “living rulebook” concept

Goal 7 Metrics

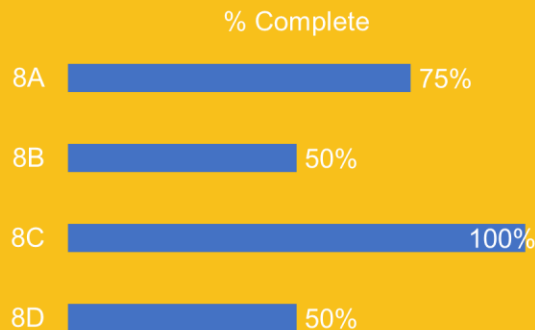
Manage the Cal TF and
Cal TF PAC



- 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
 - Draft Roadmap presented to PAC in June
- 8B. Develop and finalize the 2024 Cal TF BP and budget
 - Draft 2024 Business Plan presented to PAC in June
- 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 **4** 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](#)
 - ✦ [5X Custom Initiative Workplan](#)
- 8D. Provide quarterly status updates to the PAC on business plan and budgets
 - 2022 BP Annual Report
 - 2023 BP, Q1 Progress Update
 - 2023 BP, Q2 Progress Update