

Cal TF Custom Subcommittee Meeting #10



JULY 12, 2023
ARLIS REYNOLDS
SPENCER LIPP

Agenda & Goals



- **Announcements**

- July 27 TF Meeting (Los Angeles) will focus on Custom
- No Subcommittee or TF meeting in August

- **Meeting Agenda**

- Workplan Updates (10 mins)
- Subcommittee recommendation of CMP: Steam Boilers (15 mins)
 - ✦ [Cal TF Custom Measure Steam Boilers v0.1.docx](#)
 - ✦ **ACT:** Subcommittee recommendation of Steam Boiler CMP
- 5A-4 Custom Tools Library (30 mins)
 - ✦ [Cal TF Custom Tools List REVIEW.xlsx](#)
 - ✦ **ACT:** Complete stakeholder input on custom tools list by **7/28/23**
- 5A-1 Custom Policy Library and Review (45 mins)
 - ✦ [Cal TF Custom Resources Workbook](#)
 - ✦ [Cal TF Custom Policy Materials](#)
 - ✦ **ACT:** Stakeholder input on policy resources; challenges; recommendations

- **Meeting Goals**

- Subcommittee recommendation of Steam Boiler CMC (5C)
- Stakeholder input on Custom Tools list (5A-4)
- Stakeholder input on statewide custom policy resource summary (5A-1)

Custom Initiative – Status



Metric	Activity/Task	Status Update	Upcoming
5X	Custom Initiative Workplan	Complete (Affirmed by TF, PAC in April)	-
5A-1	Regulatory Summary & Review	Discussing library and recommendations today	Request for stakeholder input to complete library of resources/guidance, identify questions/challenges
5A-2	SW Custom Measure ID	Conducting follow-up meetings with PAs	Updated SW Measure Code Structure (September)
5A-3	List of Measures for SW Custom Measure Packages	Cal TF Staff compiling measure list (claims and CPR data)	Stakeholder input to identify/prioritize measures for SW standardization
5A-4	List of Custom Tools	Request for stakeholder input to prioritize tools for updating and development by Jul 28	-
5B	Custom Roadmap	Cal TF Staff drafting based on stakeholder input to date	Stakeholder input to identify/prioritize needs/efforts for Roadmap
5C-1	SW Measure Characterization	Steam Boiler MP final draft for subcommittee review/recommendation	TF affirmation of Steam Boiler CMC (July) Stakeholder review of RCx
5C-2	Custom MP and Tool Development Workflow	Cal TF Staff developing proposal based on stakeholder input from May meeting	Stakeholder review/affirmation of proposed SW process (July TF meeting)
5D	eTRM Documentation	Custom Measure Characterization template	TBD based on eTRM implementation
5E-1	eTRM Custom Phase 1	Complete (Custom Library scheduled for 2024 Q1)	-
5E-2	Future Custom eTRM Modules	Discussing disposition database and CMPA	eTRM 101 Training
6B	White Paper: ISP	Stakeholder Survey, complete by July 28	-

Blue text = status updates

Highlight = current/upcoming stakeholder input



Quick Updates

Custom Initiative &
Workplan Updates

- Stakeholder Input Opportunities
 - Steam Boiler Custom Measure Package
 - ✦ [Draft Steam Boiler CMC](#)
 - ✦ Discuss today; TF affirmation on 7/27
 - Custom Tools List
 - ✦ [Custom Tools List for Stakeholder Review](#)
 - ✦ Review and provide input by 7/28
 - ISP Stakeholder Survey
 - ✦ Release survey 7/17; respond by 7/28

July 27 TF Meeting Agenda



- Thursday, July 27, 10am-4pm
- LACI Building, Los Angeles (remote options available)
- Email arlis.reynolds@futee.biz for meeting invite

- [Draft Agenda](#)

- Custom Topics
 - Custom Initiative Overview and Updates
 - Custom Measures Prioritization (5A-3) ***new***
 - Custom Tools Library (5A-4)
 - Custom Policy Review (5A-1)
 - Custom Measure Package and Tool Development Workflow (5C-2)
 - Custom Measure Packages (5C-1)
 - ✦ Steam Boiler (**TF affirmation**)
 - ✦ Retrocommissioning
 - ✦ Chiller System Upgrade



Metric 5C-1

Statewide Custom Measure Packages

- **Objective**
 - SW Custom Measure Packages (**CMP**)
 - ✦ Definitions
 - ✦ Eligibility
 - ✦ Savings methods
 - ✦ Data collection requirements
 - ✦ M&V requirements
 - ✦ Calculation Tools/Resources
- **Approach**
 - Custom Measure Subgroups
 - Solicit CPUC input
 - Custom Subcommittee approval
 - Cal TF affirmation
 - Solicit CPUC approval
- **Deliverables**
 - Custom Measure Packages, presented to Custom Subcommittee for recommendation

Custom Measure Characterization

Statewide Measure Packages



- Boiler Efficiency
 - Target July TF meeting
- Retro-commissioning
 - Target September TF meeting
- Chiller System Upgrade
 - Target October TF meeting
- Pump Systems
- VFD on HVAC Fans (POU)

- All materials accessible on the SharePoint [Custom Measure Library](#)
- Email Spencer.Lipp@futee.biz to join working group(s).

SW Custom MP Boiler Timeline



- ☑ 4/5 - Present MP to Custom Subcommittee
- ☑ 5/3 - Update at Custom Subcommittee
- ☑ 5/8 – Initial comments due
- ☑ 5/26 – Boiler measure group review of comments
- ☑ 6/30 - Post final drafts for Subcommittee review
- **7/12 – Custom Subcommittee final review**
- 7/27 – Cal TF affirmation
- TBD – CPUC approval

Steam Boiler Measure Package

Materials

- [Measure Package](#)
 - [Measure Characterization](#)
 - 3 tools:
 - ✦ [Load Balance & Score Card Tool \(ver 1.43\).xls](#)
 - ✦ [Excess air and boiler efficiency.xlsx](#)
 - ✦ [DOE MEASUR](#)

Hyperlinks require access to the Custom Subcommittee SharePoint site; email arlis.reynolds@futee.biz to request access.

Group Members

- Steven Long* (ICF)
- Roger Baker* (Indep)
- Myrna Dayan* (Cascade)
- Wayne Chi (SCG)
- Afshan Hasan (SCG)
- Wilfredo Garcia (SCG)
- Anthony Zavala (SCG)
- Jessie Wang (SDG&E)
- Novi Leigh (ICF)
- Vivek Joshi (Willdan)
- Glen LaPalme (TRC)

* TF member

Steam Boiler Measure Package

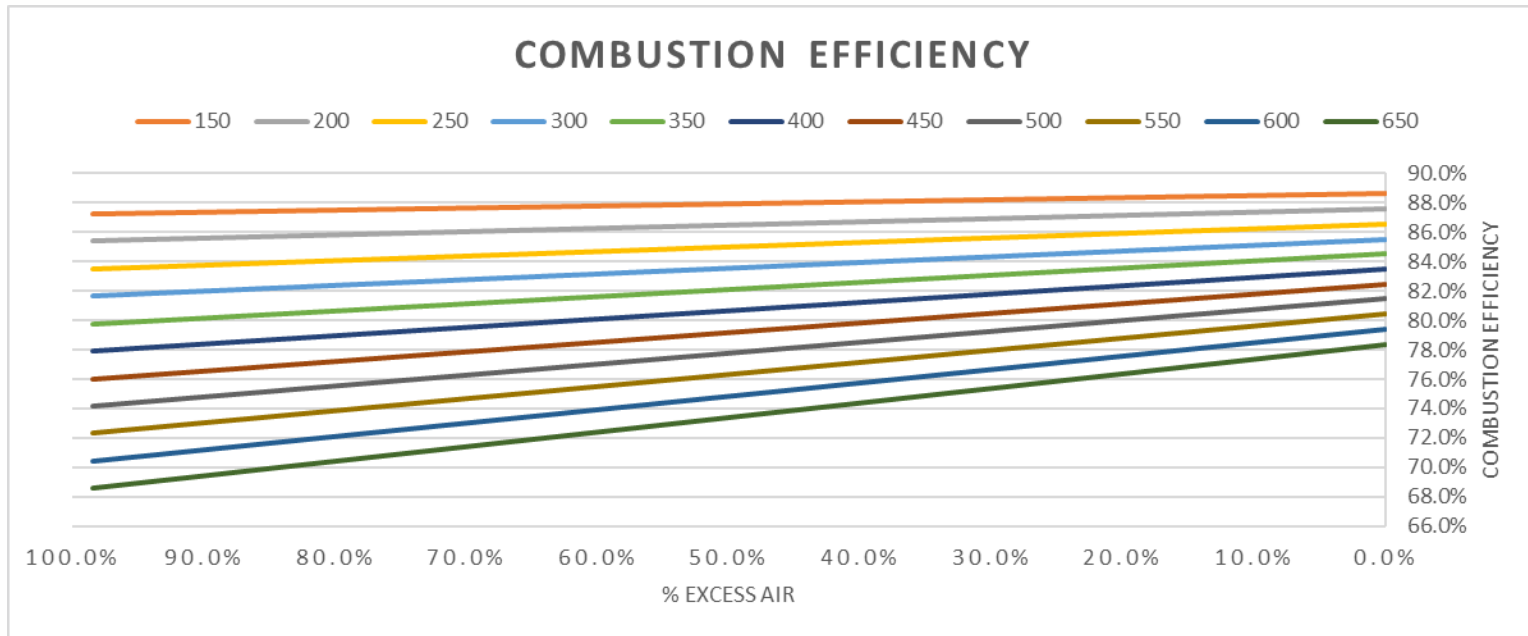


- Largest steam boiler replacements not covered by deemed MPs
 - NR and AR MATs for space heating boilers >10,000 kBtu/hr
 - NR and AR MATs for process boilers >20,000 kBtu/hr
- Other requirements
 - Only applies to retrofit cases
 - No major capacity change
 - Operating pressure > 15 psig
- Excess air and boiler efficiency tool to determine site specific baseline
- Provides step by step M&V and calculation procedure

Steam Boiler Tool Descriptions



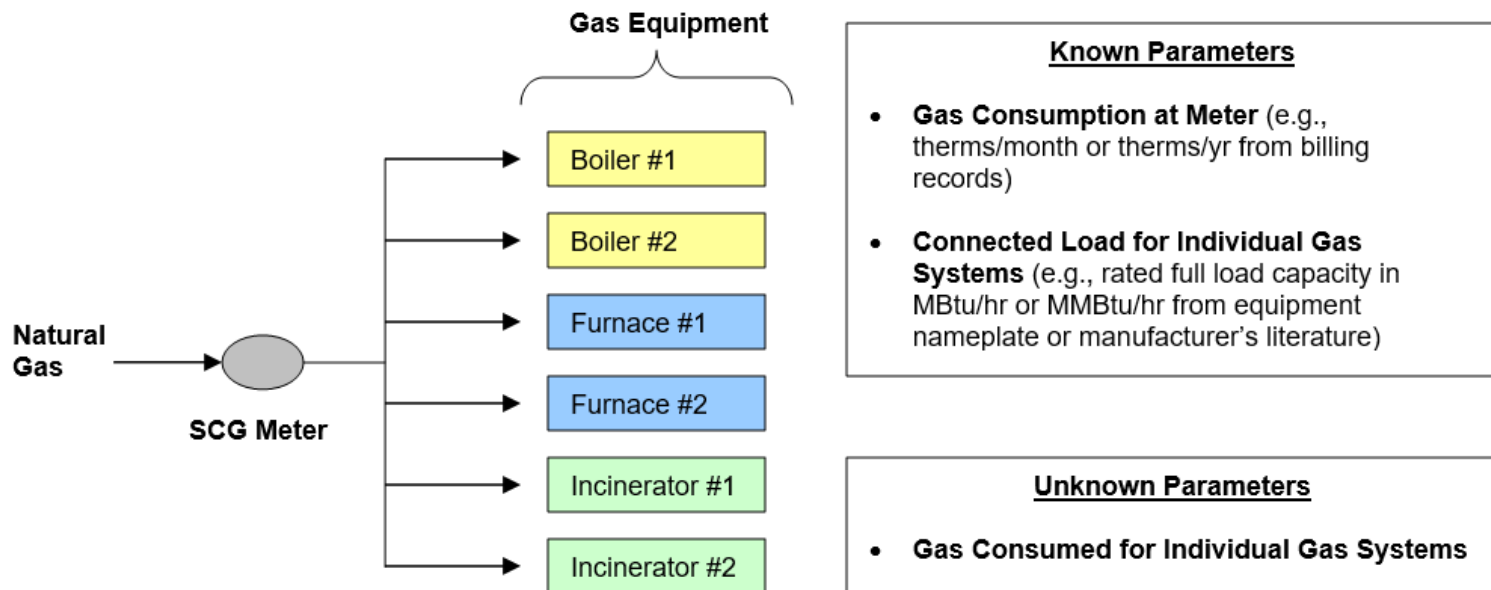
- Excess air and boiler efficiency
 - Excel calculator (SoCalGas)
 - Uses the same method as [CA Air Resources Board](#) (ASME PTC-4 indirect method)
 - Three inputs – ambient temperature, excess O₂%, stack temperature
 - Outputs combustion efficiency



Steam Boiler Tool Descriptions



- Load Balance and Scorecard Tool
 - Excel calculator (SoCalGas)
 - Defined methodology to determine gas use estimates for equipment connected to a common meter



Steam Boiler Tool Descriptions



- **DOE MEASURE**

- ❑ Previous DOE Steam System Modeling Tool
- ❑ Adjust Boiler Operations, Combustion Efficiency

SELECT POTENTIAL ADJUSTMENT PROJECTS

Select potential adjustment projects to explore opportunities to increase efficiency and the effectiveness of your system.

Add New Scenario

Modification Name

Adjust General Operations

Adjust Unit Costs

Adjust Boiler Operations

Adjust Boiler Combustion Efficiency

Baseline

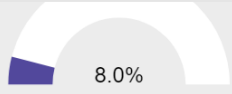
Combustion Efficiency

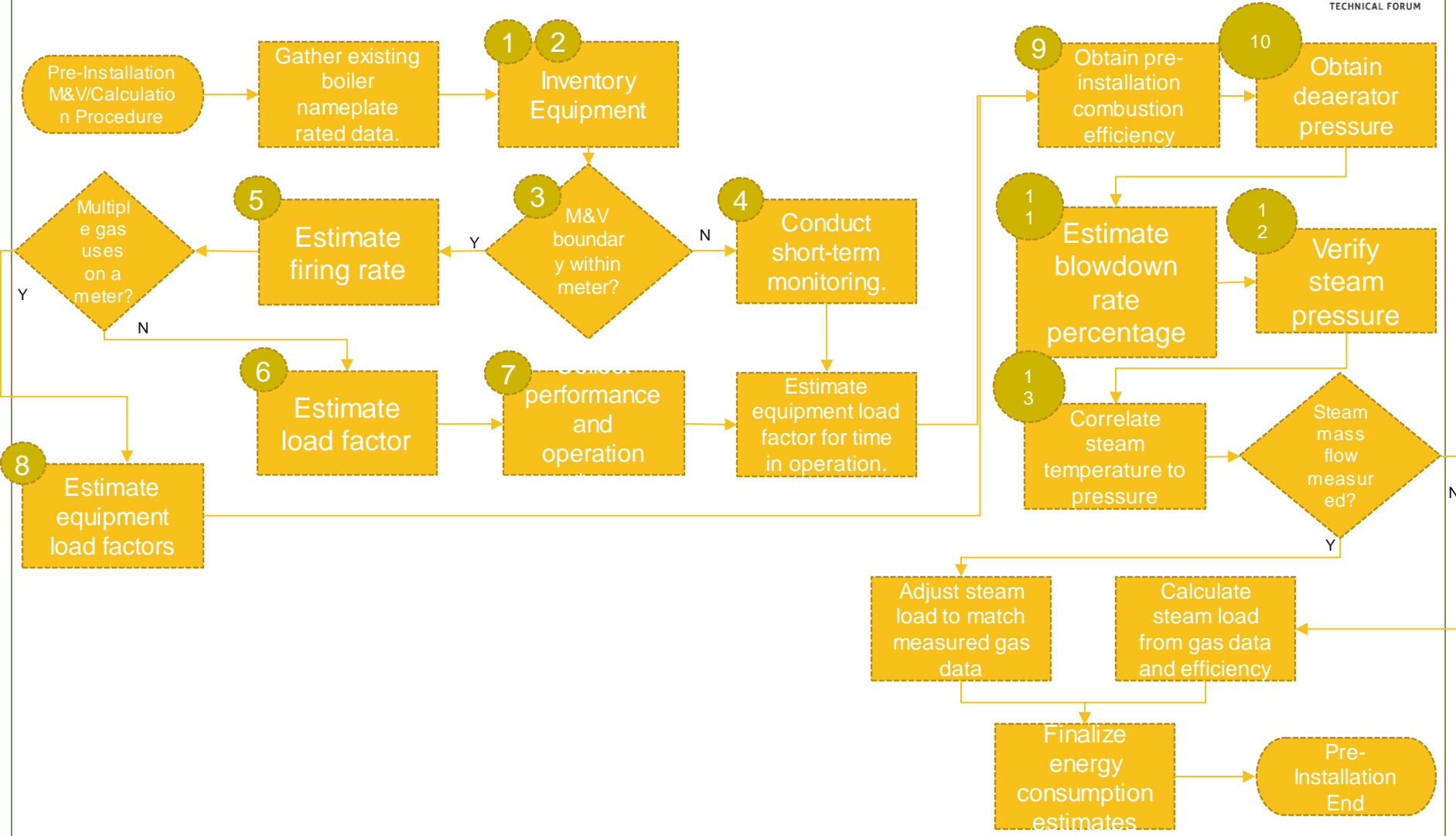
78%

Modifications

Combustion Efficiency

%

RESULTS	SANKEY	HELP
Percent Savings (%)	— —	 <p>8.0%</p>
Fuel Usage (MMBtu/yr)	4,494,046.8	4,123,948.9
Fuel Cost (\$/yr)	\$25,975,591	\$23,836,424
Electricity Purchased (kWh/yr)	40,000,000	40,000,000
Electricity Cost (\$)	2,000,000	2,000,000
Water Usage (gal/yr)	176,236,210.5	176,236,210.5
Water Cost (\$/yr)	440,591	440,591
Power Generated (kW)	13,807.6	13,807.6
Process Use (MMBtu/yr)	306.5	306.5
Stack Loss (MMBtu/yr)	123.6	77.3
Vent Losses (MMBtu/yr)	0.5	0.5
Unrecycled Condensate Losses (MMBtu/yr)	51.5	51.5



Example of M&V Points



1. **Inventory Equipment box** - Inventory the equipment connected to the meter and collect **Connected Load** (e.g., rated full load capacity in Btu/hr from equipment nameplate or manufacturer's literature), estimated firing rate (load factor multiplied by connected load) and annual operating hours of each piece of equipment.
2. **Inventory Equipment box** - If meter data lacks frequent readings to obtain operating hours, interview plant personnel regarding nominal boiler operation and maintenance activities.
3. **M&V Boundary Within Meter decision** - Utility meter or submeter.
4. **Conduct Short-Term Monitoring box** - Conduct short-term monitoring of gas consumption for a period varying from:
 - a. 2 weeks for non-weather dependent and lowest savings impacts
 - b. 8 weeks for weather dependent, and savings impacts up to 100,000 therms
 - c. 12 weeks for savings impacts over 100,000 therms to determine actual loading and run hours.

Discussion/Questions



- Comments from Custom subcommittee?
- **ACTION:** Recommend Steam Boiler Custom Measure Package (CMP) to the TF for affirmation



Metric 5A-4

List of Custom Tools

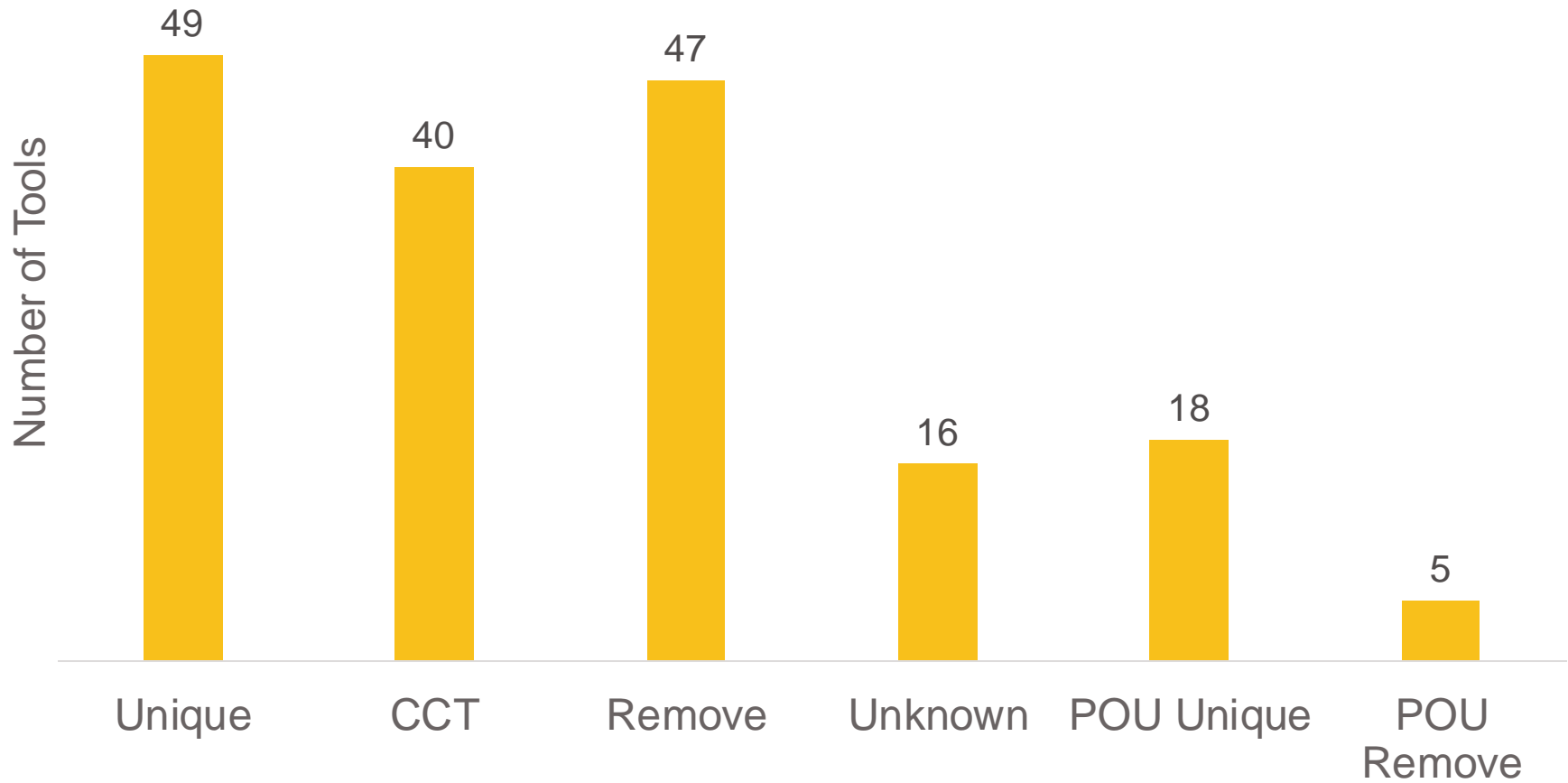
- **Objective**
 - Identify and characterize custom tools that stakeholders may use to develop custom projects
- **Approach**
 - Identify and gather existing tools
 - ✦ Need support from CPUC, IOUs, implementers to identify and access
 - Characterize tools (e.g., use, status)
 - Identify and prioritize needs to improve the library of useful tools
- **Deliverables**
 - List of characterized custom tools used in past five years.
 - Public library of custom tools with summary information
 - Prioritized list of needs to update, seek approval, and/or develop new custom tools.



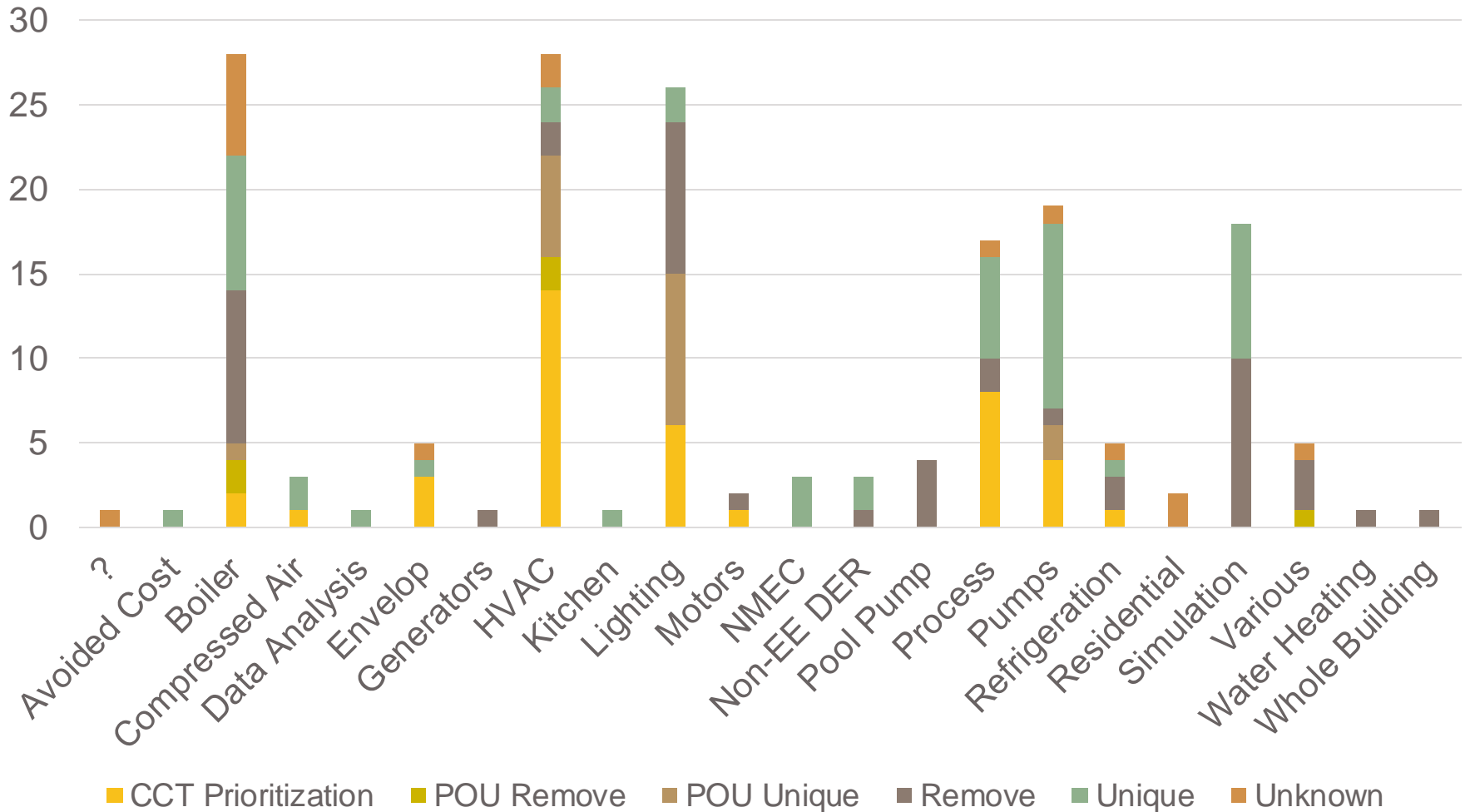
List of Custom Tools (5A-4)

- Tool sources (175 entries)
 - CPUC/IOU Custom Tool Archive (CTA)
 - Custom Subcommittee Tools List
 - POU Measure Workbooks
 - 2013 Customized Calculation Tool (CCT)
 - CEDARS and CPUC Custom Team input
- Characterization of each tool
 - Unique – Primary consideration for library
 - Removed – Assessed to not be included
 - Unknown – Unclear on Unique or Removed
 - ✦ Deemed measures
 - ✦ Obsolete/not maintained
 - ✦ Redundant with SW tool (e.g., MLC)
 - CCT – Specific tool
 - POU – Part of separate survey

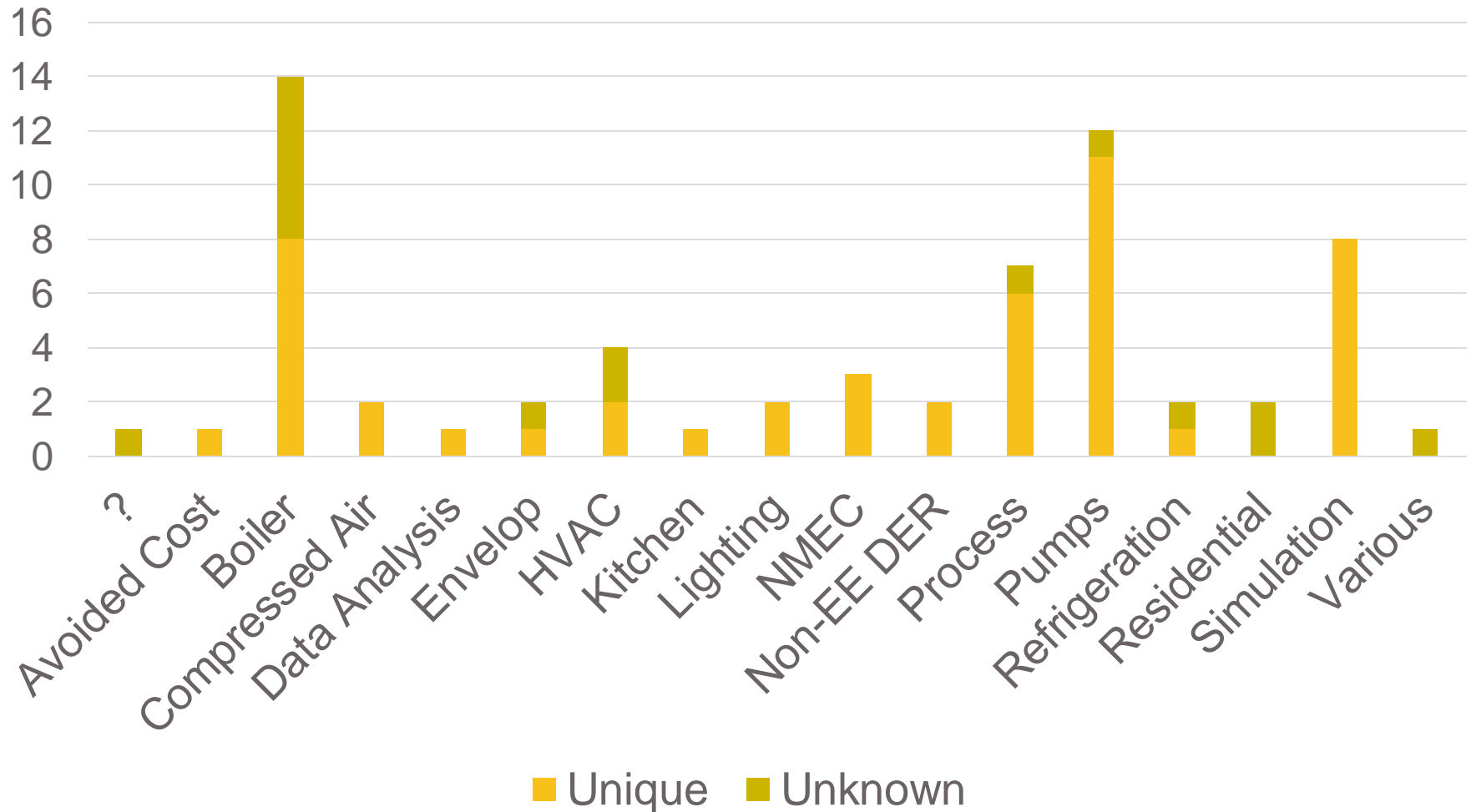
Custom Tool Categorization



Custom Tool Categorization by End Use



Unique and Unknown Tools by End Use



Stakeholder Input (5A-4)



Download Custom Tool Library

Cal TF Staff requests input in this tab in the yellow highlighted columns on the following:

Column H - Please indicate your interest in prioritization from 0 to 3.
 0 = no interest
 1 = low priority
 2 = medium priority
 3 = high priority (would help programs today)

Some tools have a question for specific stakeholders in **Column I**. Please review for your organization/interest group and respond in **Column J**.

Column K - Please input if you are aware of the tool being used in an approved custom project in the last 5 years?
Column L-R - If answered 1, 2, or 3 in Column H, identify any updates you are aware would be required for the tool to be used with current policy. See cell comments for more specific information on each potential update needed.

No.	Issue	CUSTOM-CALCULATION TOOL	DESCRIPTION and APPLICATION	End Use	Cal TF Staff Awareness	Cal TF Staff Notes	EMFV Interest and prioritization (0 = no interest, 1 = low, 2 = medium, 3 = high)	Specific Stakeholder Questions	EMFV Stakeholder Response to Questions	EMFV Used in an approved project in the last five years (Yes, No, Unsure/Other)	DOE Peak Pivot	Current Weather File	T-24 Buildings	Non-T-24 Buildings	Policy	CalTF Asset	
1	CTA	WEG Pumps & Motor PROSC (General) Tool	Application: This spreadsheet tool uses generic pump curves to calculate pump energy savings from efficiency and VFD controls upgrades. Inputs include motor and pump design specs, pump impeller type, pumping system characteristics, and a flow profile. Results (kWh) or hours in either output of modeling. The spreadsheet outputs savings for both baselines for every analysis. The pump curve profiles were created from data in the Statewide CCT software.	Pumps	Unique	EMFV has identified engineers that have familiarity and can support the tool.		DOE: please advise if this tool requires any updates.									
2	CTA	eQuest	Application: For estimating energy savings for T-24 buildings in retail and non-residential projects. Baseline and Proposed models created by user.	Simulation	Unique	Uses the DOE 2.2 engine for whole building modeling.											
3	CTA	DOE 2.2R	The DOE 2.2R version is a sophisticated component-based energy simulation program modeling the interaction between the building envelope, lighting, systems, and refrigeration systems. The 2.2R version is specifically designed to include integration, controls, using integrated properties, night flow and compressed models to accurately describe refrigeration system operation and control system effects.	Simulation	Unique	Modeling tool supporting buildings with complex integration systems.											
4	CTA	EMAC Tool	Application: Used by Third Party Resource Solutions Group (PROS) for the Smart Energy Efficiency Program. The program's Excel spreadsheet calculates energy savings for Heating and Ventilation.	EMAC	Unknown	Unknown how these measures may be eligible for inclusion of this savings with demand. Check if CLO/Maxout supports any updates. Link levels at least weather updates.		RE: Should this tool be investigated for items listed in the Cal TF Staff notes?									
5	CTA	SE Plus	Application: Used by Third Party Resource Solutions Group (PROS) for Heat Transfer Projects.	Water	Unique	Although the description indicates this is a SP tool, it is a free download developed by insulation groups and supported by the DOE.		EMFV: SC20: Although the tool can be downloaded for free, the CTA based this tool as proprietary. Please confirm this is the case and if this limits the use of the tool for inclusion in a public library.									
6	CTA	FRACE TSD	Application: Whole building energy simulation tool for commercial buildings.	Simulation	Unique	Therac's whole building energy simulation tool. Requires input files. Although some models appear to be in DOE, MCASUR tool, AEM is still supported through the Commercial Air Challenge and has been offered previously.											
7	CTA	AC Master	Air Compressor Standards modeling tool for a variety of measures. Some measures include compressor replacement, staging, pressure reduction, air flow reduction.	Compressor / Air	Unique	Cal TF Staff is aware of the use of this tool but is unclear if there are different versions.											
8	CTA	DOE Pump Tool Tool	Pumpup Upgrades. Applicable only for DOE's Pump Tools.	Pumps	Unique			DOE: please identify the current version of this tool.									
9	CTA	Super System Tool															

Calculating savings for the installation of the Ontinet control control system C

Read Me | Main Input Tab | CCT Input Tab | Removed Input Tab | Consolidated List of All Tools | All Tools Pivot | CTA | +

Stakeholder Input (5A-4)



- Main Input tab
 - Unique and Unknown tools
 - Requested Input
 - ✦ **Interest and prioritization** on 0-3 scale (0 = no interest, 3 = high priority)
 - ✦ **Awareness** of tool being used in an approved project in the last 5 years
 - ✦ On prioritized tools, opinions on potential updates needed

Stakeholder Input (5A-4)



- CCT Input tab
 - Last update at least 2013
 - Cal TF Staff has identified 11 potential tools of interest
 - ✦ Eligible custom measures (i.e., no deemed offering)
 - ✦ No Unique tool for the same measure
 - ✦ Assessment of overall savings potential through custom platforms
 - Requested input
 - ✦ Review and indicate any interest in any of the tools or interest prioritized on a 0-3 scale

Stakeholder Input (5A-4)



- Removed Input tab
 - Last update at least 2013
 - Cal TF Staff has identified 11 potential tools of interest
 - ✦ Eligible custom measures (i.e., no deemed offering)
 - ✦ No Unique tool for the same measure
 - ✦ Assessment of overall savings potential through custom platforms
 - Requested input
 - ✦ Review and indicate any interest in any of the tools or interest prioritized on a 0-3 scale

Summary / Questions



- [Download Custom Tool Library](#)
- **Complete review by Friday, July 28**
 - Send workbook and any questions to Spencer.Lipp@futee.biz
- Any comments or questions on the data gathering and categorization efforts?
- Any comments or questions on the Stakeholder input exercise?



Metric 5A-1

Custom Regulatory Summary Review

- **Objective**
 - Summarize the sources and scope of existing custom regulatory guidance
 - Develop recommendations to improve access and clarity for all stakeholders
- **Approach**
 - Gather and summarize existing resources
 - Characterize resources (e.g., accessibility, update status, update frequency, clarity, and usefulness)
 - Identify potential overlap, conflicts
 - Develop, prioritize recommendations
 - ADD: Detailed Policy Review
- **Deliverables**
 - Summary of custom regulatory resources, policy, and guidance resources
 - ✦ [Custom Resources Workbook](#) (in progress)
 - ✦ [Custom Policy Materials](#) (in progress)
 - Proposal to improve approach to summarizing and providing clear guidance on custom measures, projects, and tools.

Custom Resource List and Library



- Custom Resources Workbook
 - ❑ Resource Types
 - ❑ Resource Locations
 - ❑ Resource List

- Custom Policy Materials
 - ❑ SharePoint Document Library (future eTRM library)
 - ❑ All materials in the Custom Resource List
 - ❑ Goal: Central, accessible, “one-stop-shop” for custom policy, guidance, resources

Custom Resources



Resource Types

Document Type	Includes policy or guidance	PII Flag	Public	Available
CA Legislation	Yes	n/a	Yes	Yes
CPUC Decisions and Resolutions	Yes	n/a	Yes	Yes
CPUC Guidance Document	Yes	n/a	Yes	Partial
CPUC Guidance Memo	Yes	n/a	Yes	Partial
CPUC Pilot Document	Yes	n/a	Yes	Partial
Market-Based ISP Study	Yes	n/a	Yes	Partial
Informal ISP Study	Yes	may include PII	Partial	No
Early Opinion	Yes	may include PII	Partial	No
CPR Dispositions	Yes	may include PII	No	No
CPR Dispositions (redacted)	Yes	n/a	Yes	Partial
CPUC/PA Meeting Notes	Yes	may include PII	No	No
PA-Specific Resources	Yes	n/a	Partial	Partial
CPUC Ad Hoc Communication	Maybe	may include PII	No	No
Deemed Documentation	Maybe	n/a	Yes	Yes
Evaluation Report	No	may include PII	Partial	Partial
CPUC White Paper	No	n/a	Yes	Partial
CPUC Publication	No	n/a	Yes	Yes
Custom Tool Archive (CTA)	No	n/a	No	No
Stakeholder Working Group Materials	No	n/a	Partial	Partial
ESPI Memos	No	n/a	Yes	Yes
PA Memos	No	n/a	Partial	Partial

Q: Are there other resource types we should be looking for?

Custom Resources



Resource Locations

Owner	Resource Location	Weblink	Descriptions	Public
CPUC	CPUC Website: Energy Efficiency	Energy Efficiency (ca.gov)	CPUC webpage with information/resources related to Energy Efficiency	Y
CPUC	CPUC Website: EE Baselines	Energy Efficiency Baselines (ca.gov)	CPUC webpage with information/resources related to appropriate Energy Efficiency baselines	Y
CPUC	CPUC Website: CPR Home Page	Custom Projects Review Home Page (ca.gov)	CPUC webpage with information about the custom programs	Y
CPUC	CPUC Website: CPR Guidance Page	Custom Projects Review Guidance Documents (ca.gov)	CPUC webpage that provides "details on the Commission's policies and procedures to be utilized in the development of ex ante values for custom projects/measures."	Y
CPUC	CPUC Website: CPR Stakeholder Engagement Page	Custom Projects Review Stakeholder Engagement Page (ca.gov)	CPUC webpage hosting agendas and meeting materials from previous Custom Stakeholder Working Groups	Y
CPUC	CEDARS > DEER Resources	DEER Resources - CEDARS (sound-data.com)	Contains information about select EE technologies and measures, CPUC-approved tools, and Ex Ante Review Memos	Y*
CPUC	Custom Measure and Project Archive (CMPA)	Non-DEER Resources (deeresources.info)	Provides upload, browsing, and download of custom project and measure data submitted by PAs and reviewed by Energy Division.	No
SDG&E	CA Energy Guidance.com ("Disposition Database")	Home Page - CA Energy Guidance	Searchable public database contains Program Administrator redacted versions of the CPUC staff dispositions, as well as ISP studies, guidance documents, and other Custom Projects related documents.	Y
SCE	Statewide Ex Ante Review Process Streamlining Work	Statewide Ex Ante Review Process Streamlining Work - Home (sharepoint.com)	SharePoint site for Statewide Resources and Coordination	No
SCE	SCE Resources for Trade Allies	Trade Professional Resources (site.com)	PA-hosted site for vendor resources	Y
SCE	SCE SmartSheet Platform		PA-hosted site for vendor resources	No
PG&E	PG&E Wiki Site	https://pge.wiki/Main_Page	PA-hosted site for vendor resources	No
SDG&E	??			??
SCG	??			??
Other PAs	??			??
Cal TF	Custom Subcommittee SharePoint	Cal TF Custom Subcommittee - Home (sharepoint.com)	Compiled custom resources and working documents related to the Cal TF Custom Initiative	Y*

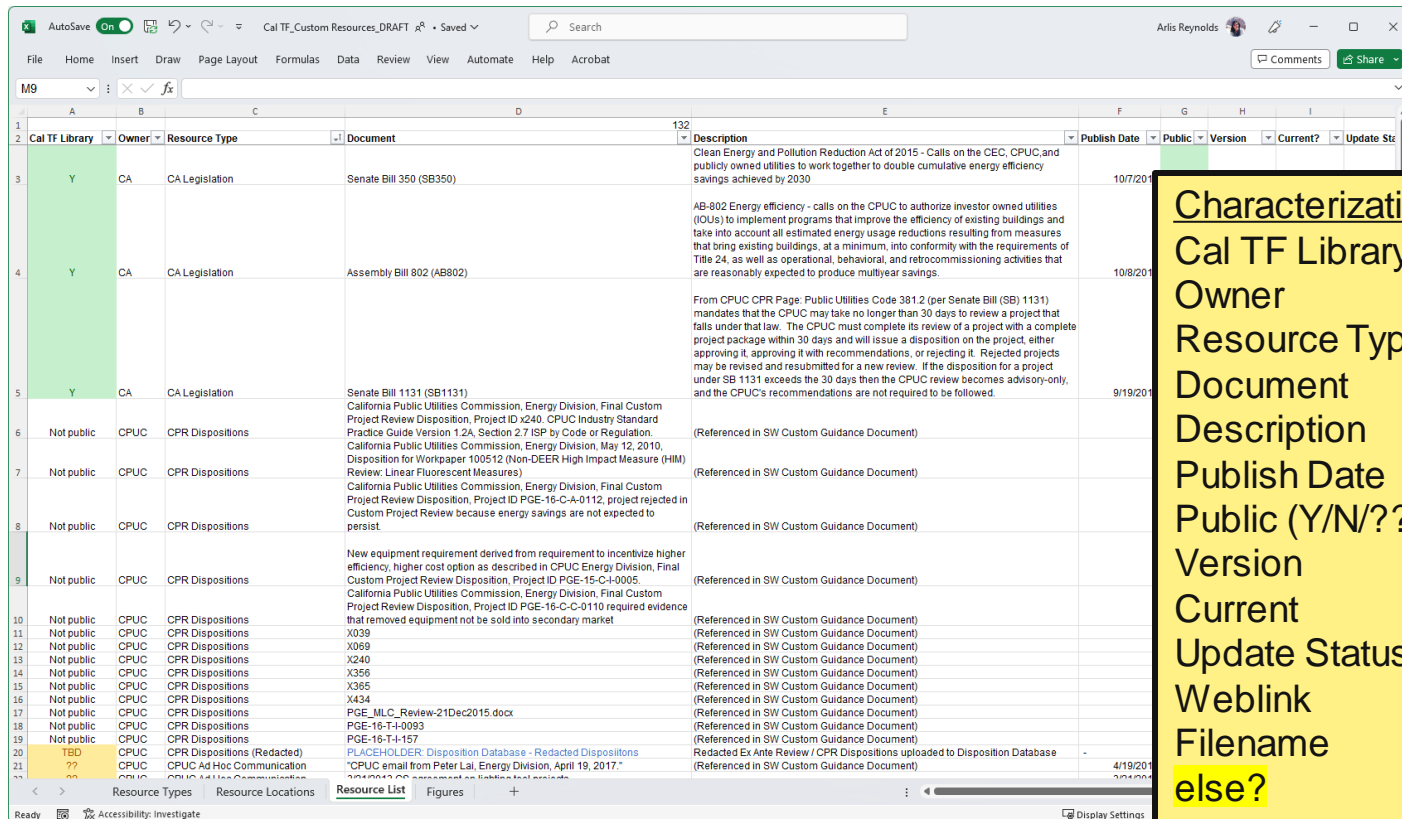
Q: Are there other locations for custom resources?

Custom Resources



Resource List

Working list of documents identified and included (if available) in resource library



1	A	B	C	D	E	F	G	H	I	
2	Cal TF Library	Owner	Resource Type	Document	Description	Publish Date	Public	Version	Current?	Update Stz
3	Y	CA	CA Legislation	Senate Bill 350 (SB350)	Clean Energy and Pollution Reduction Act of 2015 - Calls on the CEC, CPUC, and publicly owned utilities to work together to double cumulative energy efficiency savings achieved by 2030	10/7/2015				
4	Y	CA	CA Legislation	Assembly Bill 802 (AB802)	AB-802 Energy efficiency - calls on the CPUC to authorize investor owned utilities (IOUs) to implement programs that improve the efficiency of existing buildings and take into account all estimated energy usage reductions resulting from measures that bring existing buildings, at a minimum, into conformity with the requirements of Title 24, as well as operational, behavioral, and retro-commissioning activities that are reasonably expected to produce multiyear savings.	10/8/2015				
5	Y	CA	CA Legislation	Senate Bill 1131 (SB1131)	From CPUC CPR Page: Public Utilities Code 381.2 (per Senate Bill (SB) 1131) mandates that the CPUC may take no longer than 30 days to review a project that falls under that law. The CPUC must complete its review of a project with a complete project package within 30 days and will issue a disposition on the project, either approving it, approving it with recommendations, or rejecting it. Rejected projects may be revised and resubmitted for a new review. If the disposition for a project under SB 1131 exceeds the 30 days then the CPUC review becomes advisory-only, and the CPUC's recommendations are not required to be followed.	9/19/2015				
6	Not public	CPUC	CPR Dispositions	California Public Utilities Commission, Energy Division, Final Custom Project Review Disposition, Project ID x240, CPUC Industry Standard Practice Guide Version 1.2A, Section 2.7 ISP by Code or Regulation	(Referenced in SW Custom Guidance Document)					
7	Not public	CPUC	CPR Dispositions	California Public Utilities Commission, Energy Division, May 12, 2010, Disposition for Workpaper 100512 (Non-DEER High Impact Measure (HIM) Review: Linear Fluorescent Measures)	(Referenced in SW Custom Guidance Document)					
8	Not public	CPUC	CPR Dispositions	California Public Utilities Commission, Energy Division, Final Custom Project Review Disposition, Project ID PGE-16-C-A-0112, project rejected in Custom Project Review because energy savings are not expected to persist.	(Referenced in SW Custom Guidance Document)					
9	Not public	CPUC	CPR Dispositions	New equipment requirement derived from requirement to incentivize higher efficiency, higher cost option as described in CPUC Energy Division, Final Custom Project Review Disposition, Project ID PGE-15-C-1-0005.	(Referenced in SW Custom Guidance Document)					
10	Not public	CPUC	CPR Dispositions	California Public Utilities Commission, Energy Division, Final Custom Project Review Disposition, Project ID PGE-16-C-C-0110 required evidence that removed equipment not be sold into secondary market	(Referenced in SW Custom Guidance Document)					
11	Not public	CPUC	CPR Dispositions	X039	(Referenced in SW Custom Guidance Document)					
12	Not public	CPUC	CPR Dispositions	X069	(Referenced in SW Custom Guidance Document)					
13	Not public	CPUC	CPR Dispositions	X240	(Referenced in SW Custom Guidance Document)					
14	Not public	CPUC	CPR Dispositions	X356	(Referenced in SW Custom Guidance Document)					
15	Not public	CPUC	CPR Dispositions	X365	(Referenced in SW Custom Guidance Document)					
16	Not public	CPUC	CPR Dispositions	X434	(Referenced in SW Custom Guidance Document)					
17	Not public	CPUC	CPR Dispositions	PGE_MLC_Review-21Dec2015.docx	(Referenced in SW Custom Guidance Document)					
18	Not public	CPUC	CPR Dispositions	PGE-16-T-1-0093	(Referenced in SW Custom Guidance Document)					
19	Not public	CPUC	CPR Dispositions	PGE-16-T-1-157	(Referenced in SW Custom Guidance Document)					
20	TBD	CPUC	CPR Dispositions (Redacted)	PLACEHOLDER Disposition Database - Redacted Dispositions	Redacted Ex Ante Review / CPR Dispositions uploaded to Disposition Database					
21	??	CPUC	CPUC Ad Hoc Communication	CPUC email from Peter Lai, Energy Division, April 19, 2017	(Referenced in SW Custom Guidance Document)					
22	??	CPUC	CPUC Ad Hoc Communication	CPUC Ad Hoc Communication - Letter to the public	(Referenced in SW Custom Guidance Document)					

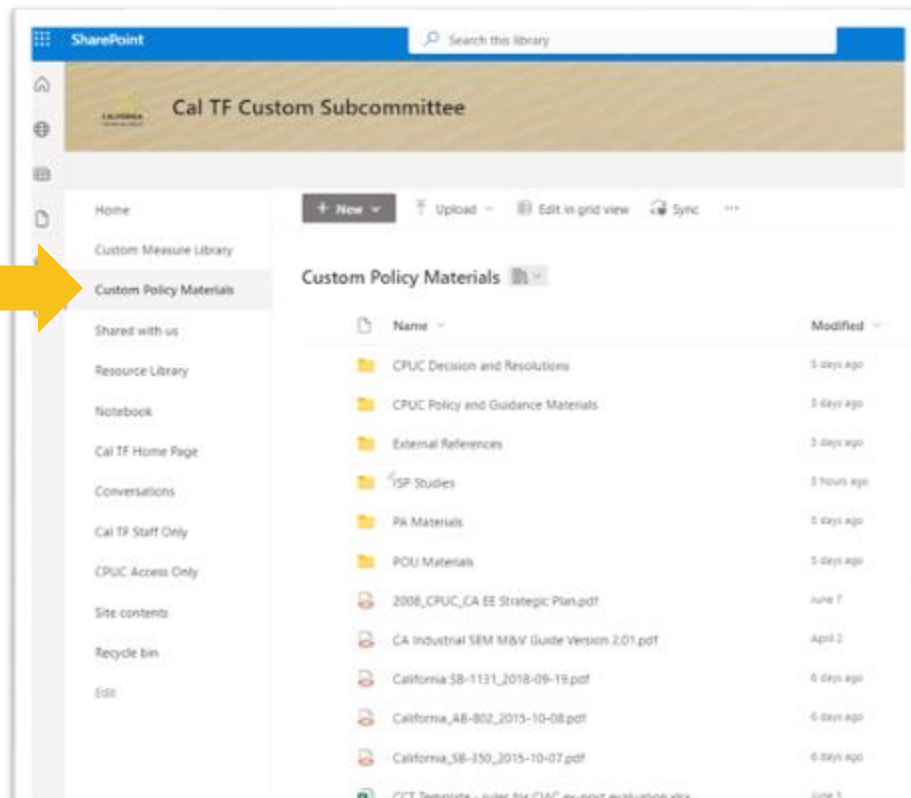
Characterizations
 Cal TF Library (Y/N/??)
 Owner
 Resource Type
 Document
 Description
 Publish Date
 Public (Y/N/??)
 Version
 Current
 Update Status
 Weblink
 Filename
 else?

Custom Resources



Custom Policy Materials

SharePoint library of materials (in progress; updated on ongoing basis)



The screenshot shows a SharePoint interface for a library titled "Cal TF Custom Subcommittee". The left-hand navigation pane includes options like "Home", "Custom Measure Library", "Custom Policy Materials" (highlighted with a yellow arrow), "Shared with us", "Resource Library", "Notebook", "Cal TF Home Page", "Conversations", "Cal TF Staff Only", "CPUC Access Only", "Site contents", "Recycle bin", and "Edit". The main content area displays a table of "Custom Policy Materials" with columns for "Name" and "Modified".

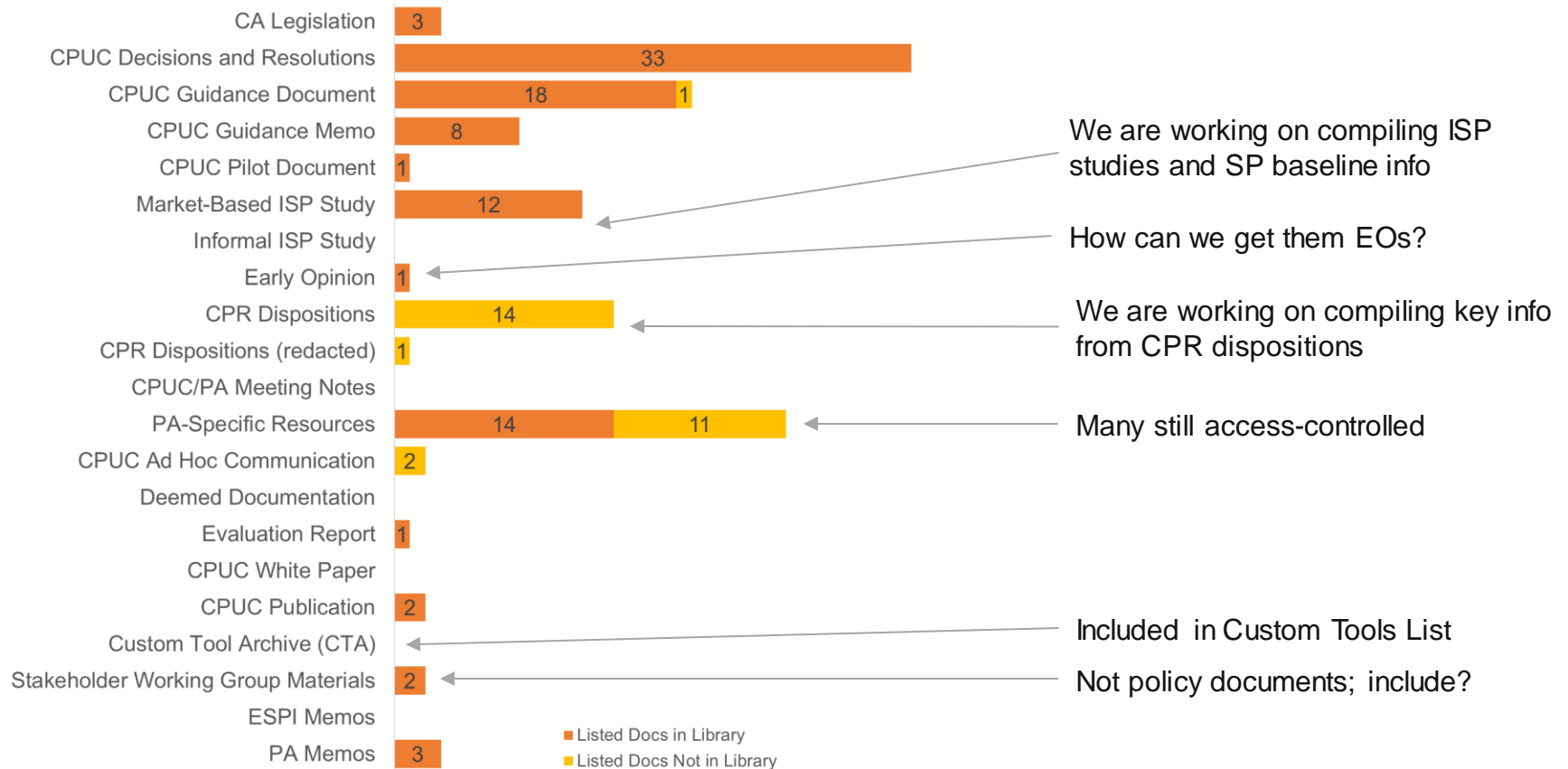
Name	Modified
CPUC Decision and Resolutions	5 days ago
CPUC Policy and Guidance Materials	5 days ago
External References	5 days ago
ISP Studies	5 hours ago
PA Materials	5 days ago
POU Materials	5 days ago
2008_CPUC_CA EE Strategic Plan.pdf	June 7
CA Industrial SEM M&V (Guide Version 2.0).pdf	April 2
California_SB-113_L_2018-09-19.pdf	6 days ago
California_AB-802_2015-10-08.pdf	6 days ago
California_SB-350_2015-10-07.pdf	6 days ago
CCT Template - rules for CIAC ex-post evaluation.xlsx	June 5

Q: How do we make this more useful and user-friendly?

Custom Resources



Custom Policy Materials



Q: What documents/types are useful? What are you looking for?

Discussion Questions



- Links

- [Custom Resources Workbook](#)
- [Custom Policy Materials](#) (Document Library)

- Discussion

- Is the Resource List/Library useful as a resource now?
- What will make the List/Library more useful and user-friendly?
- What document types are most useful to you?
- What documents are missing? What are you looking for?

Potential Recommendations



- Resources (may be overlapping)
 - Library of policy and resource documents/materials
 - Statewide Custom Guidance Document or Wiki
 - Running list of policy, guidance, interpretations
 - Statewide digest of relevant disposition findings
 - Statewide list of standard practice baselines
 - ALL central, accessible, searchable, up-to-date w/ notifications
- Needs
 - Reduce number of resources; eliminate/minimize overlapping materials
 - Resource/process to maintain resources up to date
 - More consistent sharing across PAs, broader stakeholders
 - Ability to track/reference projects across guidance/resources
 - Improve Ex Ante and Ex Post alignment/consistency
 - Make CPR Disposition comments more clear (identify issue and provide solution)
 - Connect guidance/interpretation to formal policy
 - Identify/address inconsistent interpretation/application of policy

Q: What other ideas / needs should we consider?

Detailed Policy Review



- Comprehensive policy review related to custom measures/programs
 - Understand current policy (e.g., what has been superseded)
 - Identify any overlapping/conflicting policy
 - Identify any gaps in current policy and practice
 - Seek clarification where needed
 - Make recommendations to address policy pain points
- Future Discussion/Input:
 - What specific questions do you have about custom policy/guidance?
 - Where might there be gaps in policy and practice?
 - What are key policy pain points?
- Interest in a Custom Policy Review working group?

Summary and Next Steps



- Cal TF Staff
 - ❑ Continue to populate Custom Resources Workbook and Custom Policy Materials library
 - ❑ Identify document update needs
 - ❑ Develop recommendations
 - ❑ Initiate Custom Policy Review

- Custom Stakeholders – Input on:
 - ❑ making Resource List/Library useful & user-friendly
 - ❑ which resources are most useful, need update/clarification
 - ❑ missing documents (what can't you find?)
 - ❑ policy clarifications and pain points



Wrap-Up & Next Steps

- **Action Items**
 - Provide input on Custom Tools **by July 28**
 - Complete ISP Survey **by July 28** (survey will be released on July 17)
- **Upcoming Meetings**
 - Ongoing – Measure Group meetings
 - 7/27 – Cal TF Meeting, focus on Custom
 - 9/6 – next Custom Subcommittee Meeting
 - TBD – eTRM 101 for Custom

Open Discussion



- Invitation for feedback
 - Custom Subcommittee meetings & communications
 - ✦ Frequency, format, materials, discussions, etc.
 - Custom Subcommittee SharePoint
 - ✦ Navigation, access, features, etc.
- Other questions or key issues?