Cal TF – PAC Meeting

CALIFORNIA
TECHNICAL FORUM

JUNE 8,2022
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Agenda

- Introductions

- Quick Updates
  - ❑ Cal TF 2022 Activities
  - ❑ RFQ for new TF Members

- Leveraging the eTRM for Custom Projects
  - ❑ Business Plan Goal 5
  - ❑ 5/16 Memo

Quick Updates

- Cal TF 2022 Activities
  - ❑ Measure Updates
  - ❑ New Measure Process
  - ❑ eTRM Release for 2022

- RFQ for new TF Members
  - ❑ RFQ: www.caltf.org/join-the-tf
  - ❑ Responses due June 24
  - ❑ Please encourage candidates to apply

- Cal TF Meeting: June 21st
  - ❑ New members join in July

Leveraging eTRM for Custom

- **Background**
  - ❑ 2022 Business Plan Goal 5: Continue Development of POU Custom Measures for the eTRM
    - ✖ Cal TF Staff committed to reviewing/aligning IOU custom processes/measures so POU work can be leveraged to benefit IOUs
  - ❑ POU Custom Measures – Prior Work
    - ✖ Reviewed LADWP standard custom measures
    - ✖ Drafted memo with recommendations based on review of LADWP's standard custom projects
  - ❑ Reviewed recent analyses of IOU Custom Measures
    - ✖ Working group efforts to clarify, standardize, streamline, etc.
    - ✖ CPR process improvements and SB-1131 timeline requirements
    - ✖ 2022 Process Study of IOU DDR Processes
  - ❑ 5/16/22 Memo: Leveraging the eTRM for Custom Projects
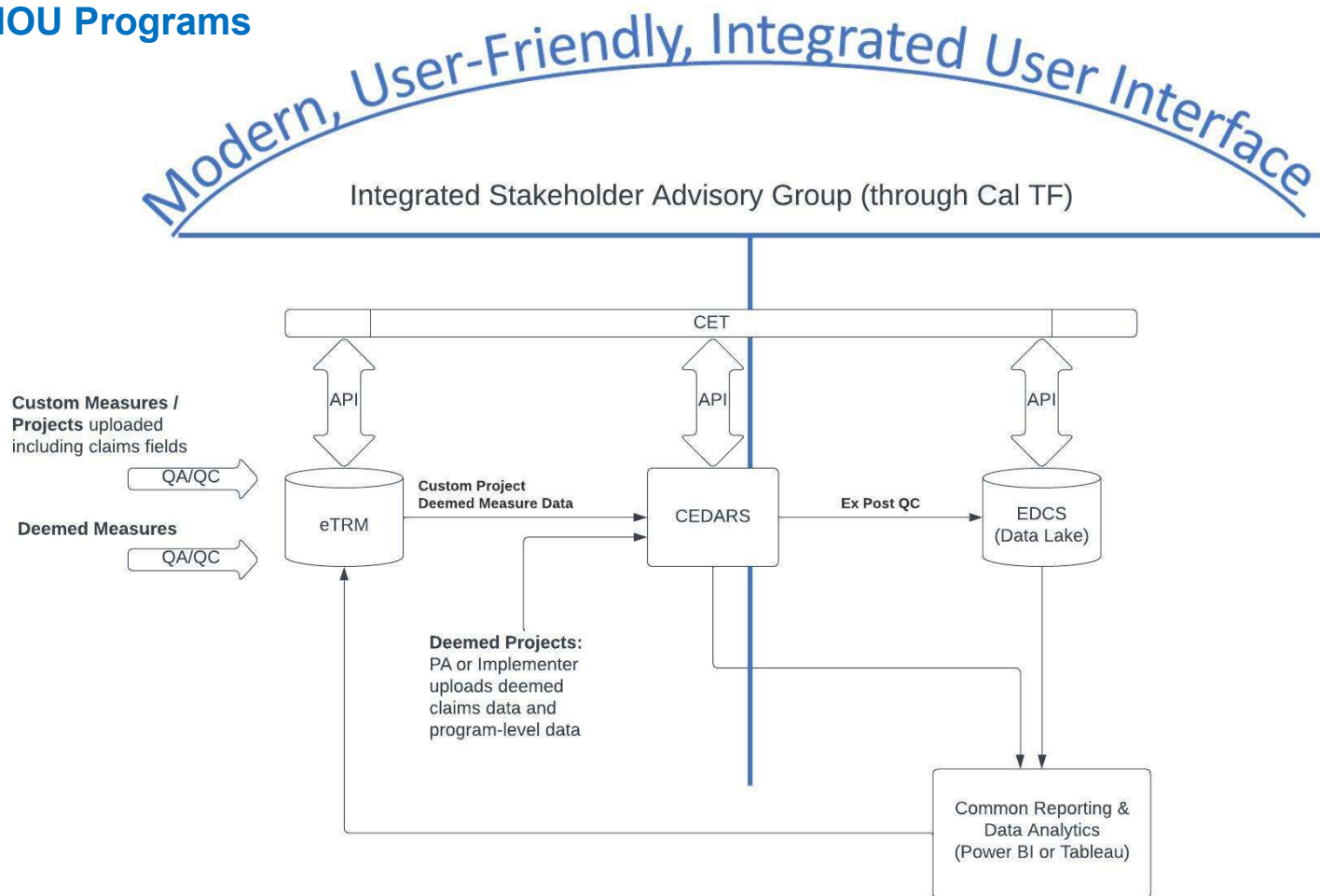
Cal TF 2022 BP Goal 5

- Goal 5: Development of POU Custom Measures for the eTRM

- BP Tactic: Cal TF Staff analysis of how existing eTRM tools can be used to standardize and streamline custom projects.

- Approach
  - ❑ Due diligence to ensure eTRM tools are useful statewide
  - ❑ Facilitate alignment among POUs and IOUs
  - ❑ Minimize redundancy (in data and effort)
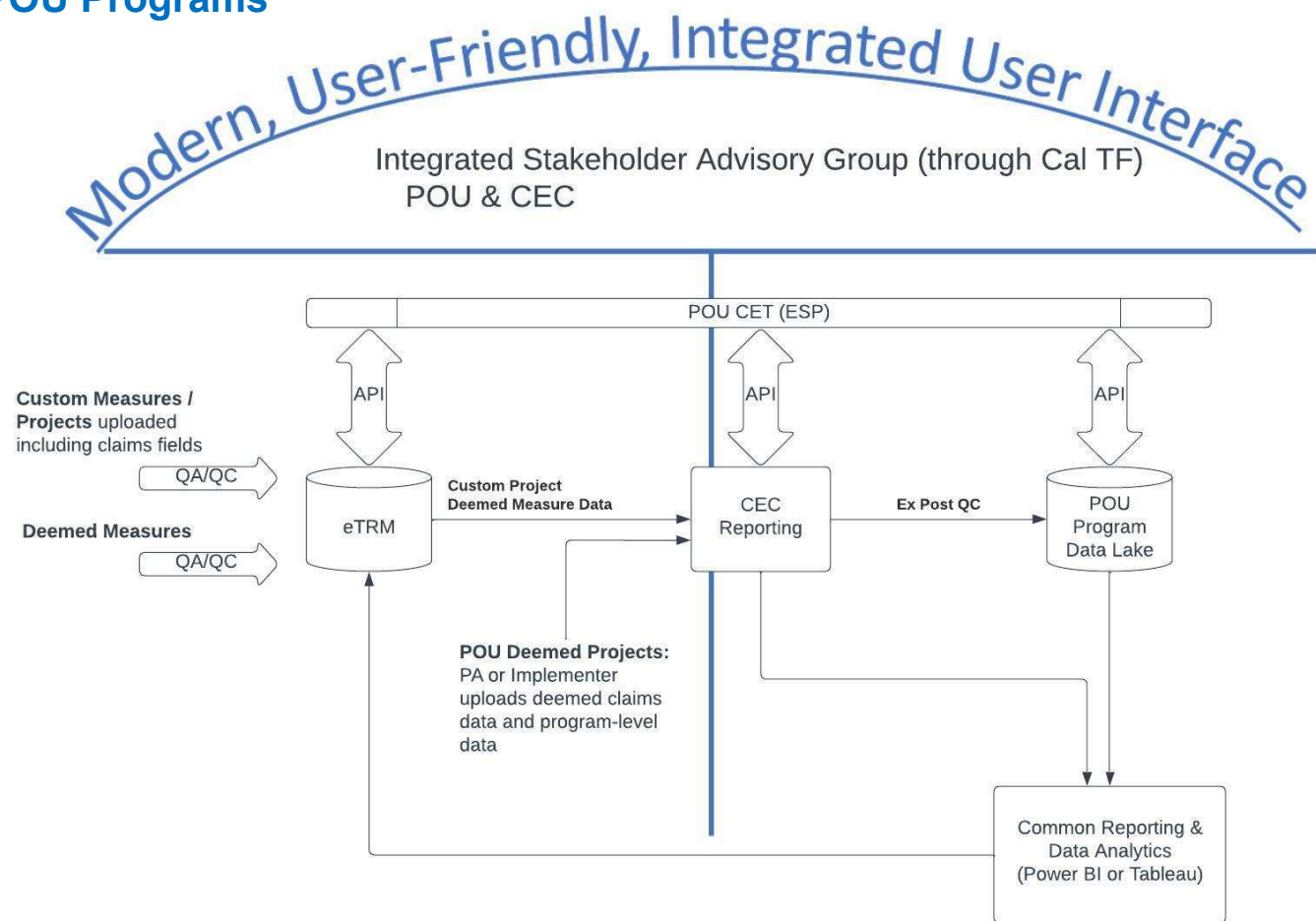 - ❑ Improve data flows and transparency

Integrated Data Flow

IOU Programs

Integrated Data Flow Journey

Leveraging eTRM for Custom

Improvement Opportunities

Overarching	Workflow Process	Project Submittal Quality

Benefits

Cost Savings	Time Savings	Transparency	Standardization	Stakeholder Engagement & Customer Experience

Outcomes

Reduced stakeholder frustration	Better project quality	Reduced time/cost for ex ante and ex post reviewers	Higher/broader implementer participation	Higher program throughput and savings

Overarching Enhancements

- Centralize custom program documentation
- Centralize and standardize DDR and CPR data tracking and reporting
- Standardize custom project nomenclature
- Standardize/clarify/enforce measure and project-specific data collection requirements
- Improve alignment between custom and deemed
- Improve data accuracy and consistency
- Enable data validation and data flows
- House all custom project data in a single repository

Workflow Process Improvements

- Facilitate complete project submittals
- Improve transparency in DDR and CPR
- Centralize/organize project information
- Facilitate/enforce established timelines
- Enable automated tracking/reporting of performance metrics
- Enable automated notifications
- Facilitate and reduce costs and time for ex ante and ex post reviews

Improving Project Submittal Quality

- Embed approved calculation tools
- Enable automated data validation and expanded review
- Incorporate default values and data references
- Incorporate embedded references to guidance documents

Summary of Opportunities

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- 2022 Business Plan Goal 5
  - ❑ Identifying, socializing, standardizing custom tools, calculations, data requirements, and nomenclature
    - ✦ Common approaches for POUs and IOUs
  - ❑ Determine how eTRM features can support custom measures
  - ❑ Continued stakeholder input on how existing eTRM tools and processes can be used to standardize and streamline custom projects