



# Agenda & Notes

## California TF Policy Advisory Committee (PAC)

August 8, 2022

Location: Teleconference Only

2:00 p.m. – 3:00 p.m.

### Agenda

- Leveraging the eTRM for Custom Projects: Long Term Vision and Roadmap
  - Continued discussion on how the Cal TF and existing eTRM tools/processes can be used to standardize and streamline custom projects
  - Next Steps

### Meeting Materials

- Presentation
  - Cal TF\_PAC Meeting\_2022-08-08.pdf

### Attendees

#### Cal TF Staff:

- Annette Beitel
- Ayad Al-Shaikh
- Arlis Reynolds
- Tomas Torres-Garcia

#### PAC Members and Guests:

- Amy Reardon, CPUC
- Armen Saiyan, LADWP
- Ajay Wadhera, SCE
- Don Gilligan, NAESCO
- Emily Lemei, NCPA
- Greg Wikler, CEDMC
- Joe Desmond, CEDMC
- John Zwick, SDG&E
- Marc Costa, The Energy Coalition
- Martha Garcia, SCG
- Peter Miller, NRDC
- Scott Fable, PG&E
- Will Vicent, CEC



## Meeting Notes

### Quick Updates

- Welcome new PAC members Joe Desmond, new Executive Director at CEDMC, and Steven Starks, new Program Development Manager at SCPPA.
- Technical Forum – RFI for new TF members is complete; 12 new members joined 24 returning members at the July TF meeting.
- eTRM updates – eTRM 2.4 release went live on August 4; developing data analytics tools for claims data; next release – conducting performance benchmark enhancements and security audit; continuing work on program data enhancements and ad hoc enhancements as needed.

### Leveraging the eTRM for Custom Projects

Annette reviewed the history and context for discussions regarding Cal TF and eTRM solutions for custom programs, shared feedback from recent stakeholder meetings with Quantum (group D evaluator) and SDG&E and encouraged additional one-on-one meetings with stakeholders to align strategies and planning with stakeholder needs and priorities. This presentation presents a “Phase 1” for the custom roadmap, and we need additional stakeholder discussions to further define and prioritize custom solutions.

Annette shared two updated figures for Integrated EE Data Flow and Integrated Custom Data Flow that depict a vision for streamlined, standardized, organized portfolio data that could intake other DER resources and other data sets (e.g., census data, solar/wind potential, heat maps, etc.) to enable more sophisticated reporting and data analysis to help future planning, implementation, and reporting. For the custom portfolio, stakeholder feedback indicates that we can capture EE savings potential at lower cost with better organization, standardization, streamlining, and clarification of regulatory guidance.

Arlis presented the Roadmap Phase 1 activities that the TF Custom Committee and Cal TF staff will begin working on. These include activities discussed previously by the PAC and a regulatory review of custom guidance, similar to a regulatory review Cal TF previously completed for deemed measures. Cal TF Staff will work with the TF Custom Committee on these items while continuing to engage PAC and other stakeholders to develop the long term Roadmap. Cal TF proposed a charette in October timeframe to discuss and prioritize custom solutions.

The following list summarizes comments and discussion points:

- Scott – agreed with vision and improvement concepts, noting that past incremental changes have made custom more complex; noted that custom



programs look at data one project at a time and expressed concern about how vision would coordinate with IOU data systems and pull in projects with custom data – need to make sure approach does not add complication; interested in the disposition review; agreed that stakeholders need a common, consistent body of guidance to find and point to

- Annette noted the emphasis is hybrid measures where there is a lot of potential for standardization, other true custom measures and custom projects could also benefit from some standardization
- Marc – interested in broadening Cal TF and eTRM perspective to “smart local energy markets” and wants Cal TF to monitor CPUC Demand Flex and DER Compensation discussions as the line blurs between EE and other DERs; Cal TF can help the industry converge and should consider how to “templatize” other DERs
- John – emphasized value of Cal TF as a statewide coordinator of stakeholders and ability to effectively coordinate on specific themes/goals, not just eTRM administrator; agrees with benefits of statewide coordination, standardization, and simplification
  - Annette agreed that most of the custom work is engineering and stakeholder collaboration rather than eTRM software development
- Peter – excited to continue moving forward; emphasized value of data in one place to address existing challenges with administrative effort, burden, and friction; sees value in Cal TF as open, public, statewide forum; sees evolution of EE to broader ecosystem of demand side resources
- Greg – agrees much potential is locked away in custom opportunities and is needed to meet goals; wants Cal TF to do more than outlined in first phase

Annette noted that California could lose Federal clean energy funding if custom is not “fixed”; shared plan for a custom charette in October; and invited PAC members to contact Cal TF staff directly with additional comments, questions, etc. ahead of the next meeting.

### **Next Steps**

PAC Meeting in September for a Business Plan update.

Cal TF plans a charette in October timeframe to discuss and prioritize custom solutions.