

Cal TF – PAC Meeting



CALIFORNIA
TECHNICAL FORUM

FEBRUARY 22, 2023

Agenda

[PAC Meeting Agenda](#)

[PAC Meeting Materials](#)

- Introductions and Agenda Review – Annette
- Lead IOU Transition/Update – John Zwick
- 2022 Business Plan Update – Ayad
- Cal TF 5-year Roadmap – Annette
 - Roadmap Purpose and Form
 - Background - Industry Trends, Organizational Wants/Needs
- Lunch (11:30-12:15)
- Cal TF 5-year Roadmap – Annette
 - Key Goals/Initiatives
- Metric 4A New Measure ID Strategy – Spencer
- Workplan Procedure and Template – Arlis
 - **Requires PAC Affirmation**
- White Paper and TPP Topics – Arlis & Annette
 - Proposed TPP: Data Integration
- Open Discussion and Next Steps – Annette

2023 PAC Schedule

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Updates in bold, added to calendars

Date	Location	Key Topics
Wednesday, February 22	In person (PG&E HQ, Oakland)	5-year Roadmap Stakeholder Challenges/Needs TPP Topics
Friday, April 28	In person (LACI Building, Los Angeles)	5-year & Custom Roadmaps Cal TF/eTRM Governance Policy/Guidance Communication
Wednesday, July 26	In person (PG&E HQ, Oakland)	2024 Business Plan
Wednesday, October 25	In person (SoCalGas ERC, Downey)	Roadmap Updates
Wednesday, November 15	Online	Affirm 2024 Business Plan

- * Quarterly meetings will include Business Plan Progress Updates
- * TF Meetings held the Thursday after PAC Meeting
- * Rotate in-person locations between LA/OC, Bay Area, and Sacramento
- * Additional ad hoc online meetings as needed

2022 Business Plan Highlights



2022 Highlights

- Back to in-person meetings!
- **13** New Cal TF Members
- **4** new Cal TF Staff members
- eTRM Release and Documentation
- **138** Measure Packages Review
- eTRM at **2,600+** users
- **23** New Measures Proposed
- Launched Custom Subcommittee
- Launched Deemed Measure Property Data Subcommittee

See **2022 Business Plan Annual Report** for additional details.

Welcome New TF Members

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Adan Rosillo
PG&E



**Anders "Andy"
Danryd**
SCG



**Andres
Fergadiotti**
SCE



**Arash
Kialashaki**
PG&E



Briana Rogers
AESC



David Chan
Enovity/Veolia



Denis Livchak
Synergy Energy



Jay Bhakta
SCE



King Lee
CLEAResult



**Kristin
Heinemeier**
Frontier Energy



Lake Casco
TRC



Myrna Dayan
Cascade



Roger Baker
*Independent
Consultant*

New members are on the TF Member Webpage: <http://www.caltf.org/tf-members>

New Cal TF Staff Members

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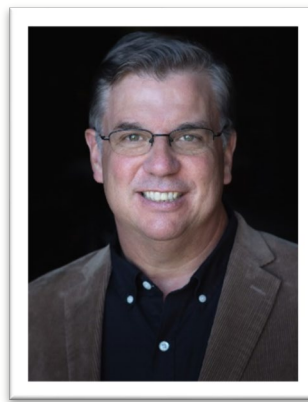


Arlis Reynolds
Costa Mesa, CA

15+ years of experience
in EE and EM&V

Led EE impact and
process EM&V and pilot
tech/program analysis

**Leading custom /
hybrid measure
activities**



Daniel May
Chicago, IL

33+ years of experience
in software
development/mgmt

Designed, matured, sold
two software companies

**Supporting next phase
of eTRM software
development**



Randy Kwok
San Jose, CA

30+ years of experience
in EE

Former TF Member

16 years with PG&E EE
team (custom, deemed,
low income)

**Supporting Measure
Property Data effort**



Spencer Sator
Boulder, CO

15+ years of experience
in energy

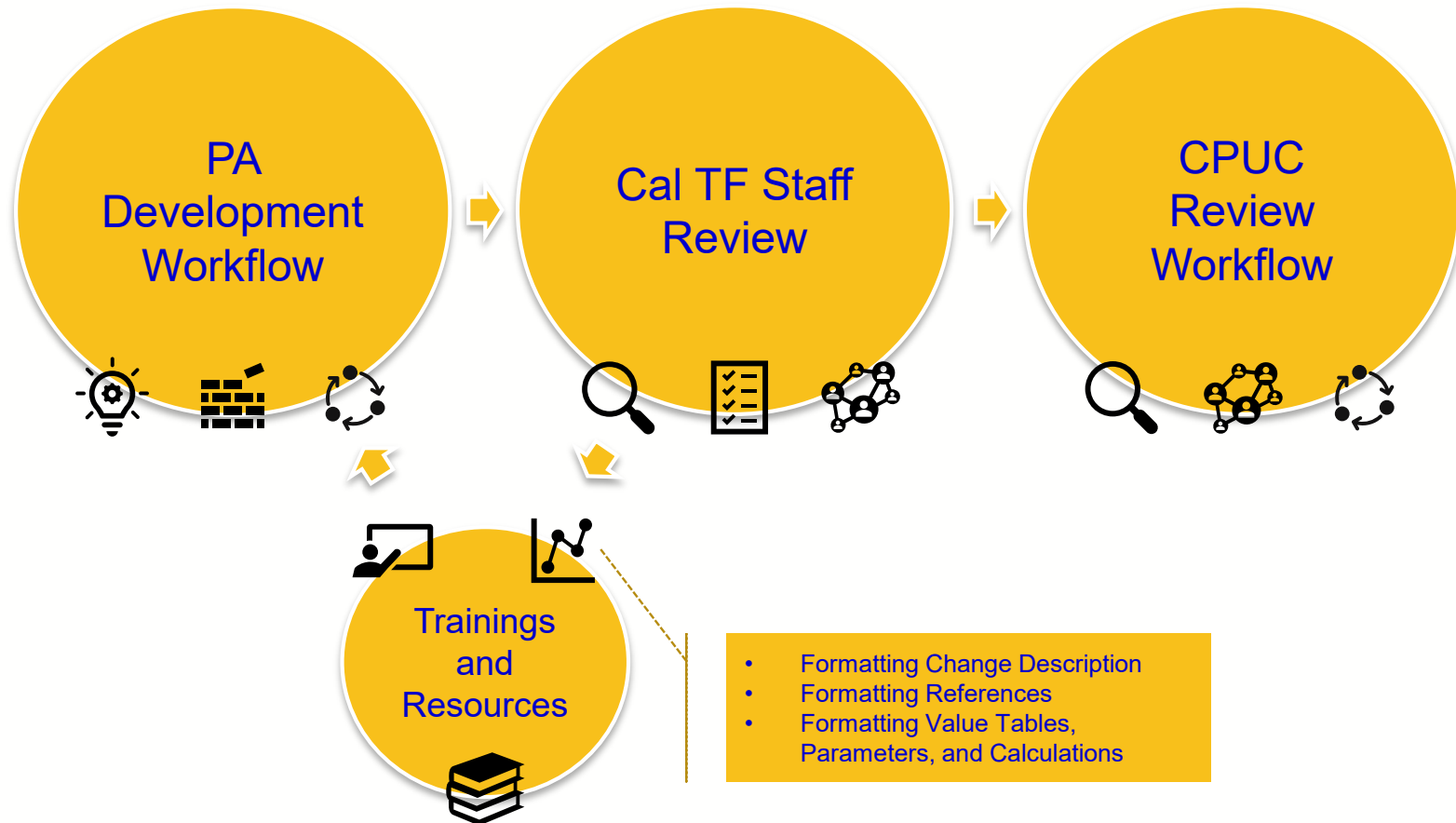
Former Director of
Emerging Technology at
E Source

**Supporting New
Measure Review
process**

Cal TF Staff Review Summary

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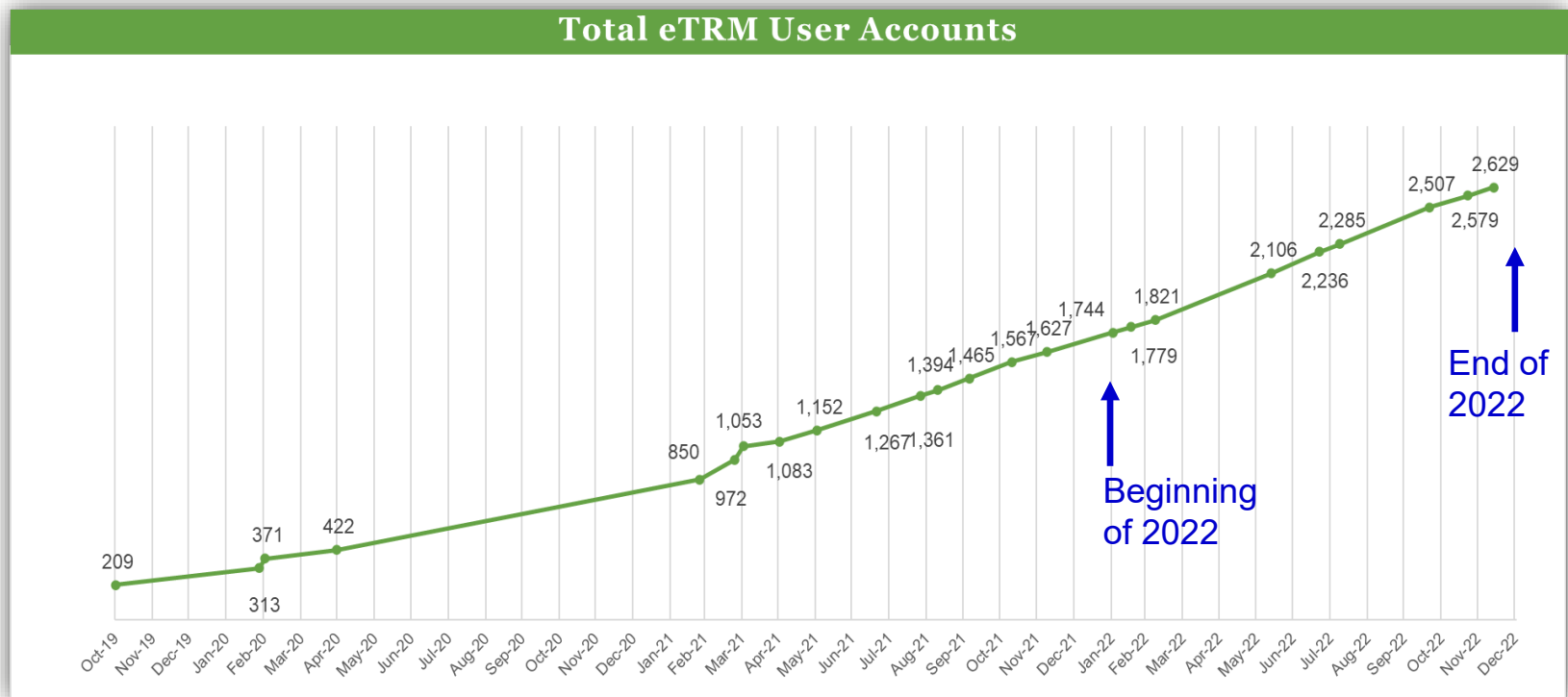
- 138 Measure Packages Reviewed



eTRM Users and Uses

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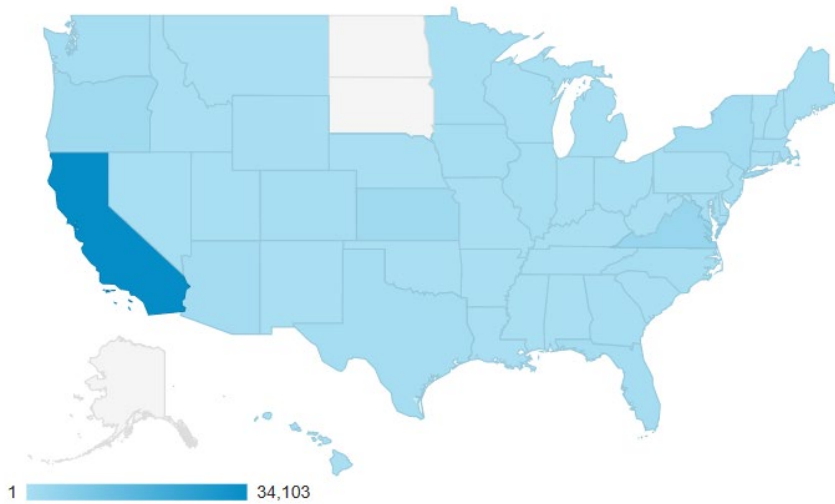
- Continued user base growth
- IOUs using eTRM data for claims



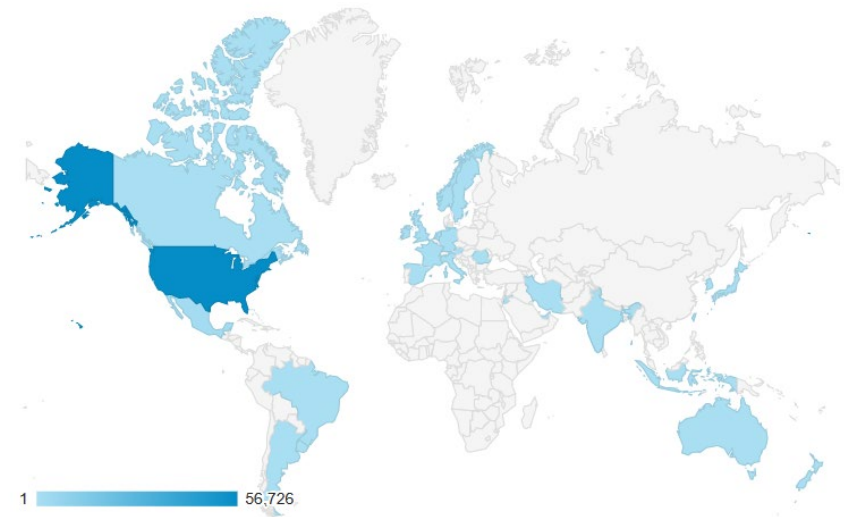
eTRM Use Activity

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eTRM Users in the United States (2022)



eTRM Users across the globe (2022)



eTRM usage data, 2022 vs 2021 (Google Analytics)

Users

75.04%

18,715 vs 10,692



Sessions

74.39%

59,346 vs 34,031



Avg. Session Duration

6.48%

00:11:34 vs 00:10:52



Pageviews

60.18%

688,148 vs 429,606



Cal TF 5-Year Roadmap



8A Cal TF 5-year Roadmap

Agenda

- Roadmap
 - Purpose
 - Form
- Background
 - Industry Trends
 - Organizational Wants/Needs
 - Regulatory Wants/Needs
- Key Goals/Initiatives



5-year Roadmap

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- BP Metric 8A. Develop 5-year Roadmap that identifies core Cal TF/eTRM activities, new strategic initiatives, and desired success factors. Roadmap will identify coordination needs and leveraging opportunities to achieve desired outcomes.

February 2023 -
PAC Brainstorm

June 2023 - Draft
Roadmap

September 2023 -
Final Roadmap

April 2023 – PAC
Discussions

Q3 2023 –
Stakeholder Input

Roadmap

Form

- **Roadmap**
 - Vision + Mission
 - Cal TF Role
 - Key Metrics
 - Visual – Diagram
 - ✦ Overarching Goals/Initiatives
 - ✦ Key Milestones
 - Supplementary Text: High-Level Overview for each Key Goal/Initiative – Consistent Form
 - Budget – 5-Year and Annual



NOTE: Roadmap will “frame” annual Cal TF Business Plan/Budget Process

Current Vision and Mission

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VISION

A respected source of California energy efficiency savings estimates and other technical information related to California's integrated demand-side management (IDSM) portfolio.

MISSION

To support the growth and success of energy efficiency and IDSM through a technically rigorous, independent, transparent peer review of California energy efficiency values and other related technical information.

Current Cal TF Role/Value

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- **Statewide** technical problem solving
- **Socialize** and **build consensus** around various technical and tech policy issues impacting the portfolios so that results are informed by and work for many different stakeholders who are united in their goal to maximize value of portfolio.
- **Building Common Tools** that can be centrally used and useful (better than each utility having their own tools)
- **Power of the Group:** Bringing IDSM ecosystem together, collaborating and “speaking with one voice.”

Current Metrics (from BP) – Others?

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- **Quantitative**

- ❑ Save money
- ❑ Increase savings
- ❑ Achieve statutory/regulatory compliance
- ❑ Increase quality/rigor
- ❑ Achieve process efficiencies
- ❑ Expediting processes and outcomes

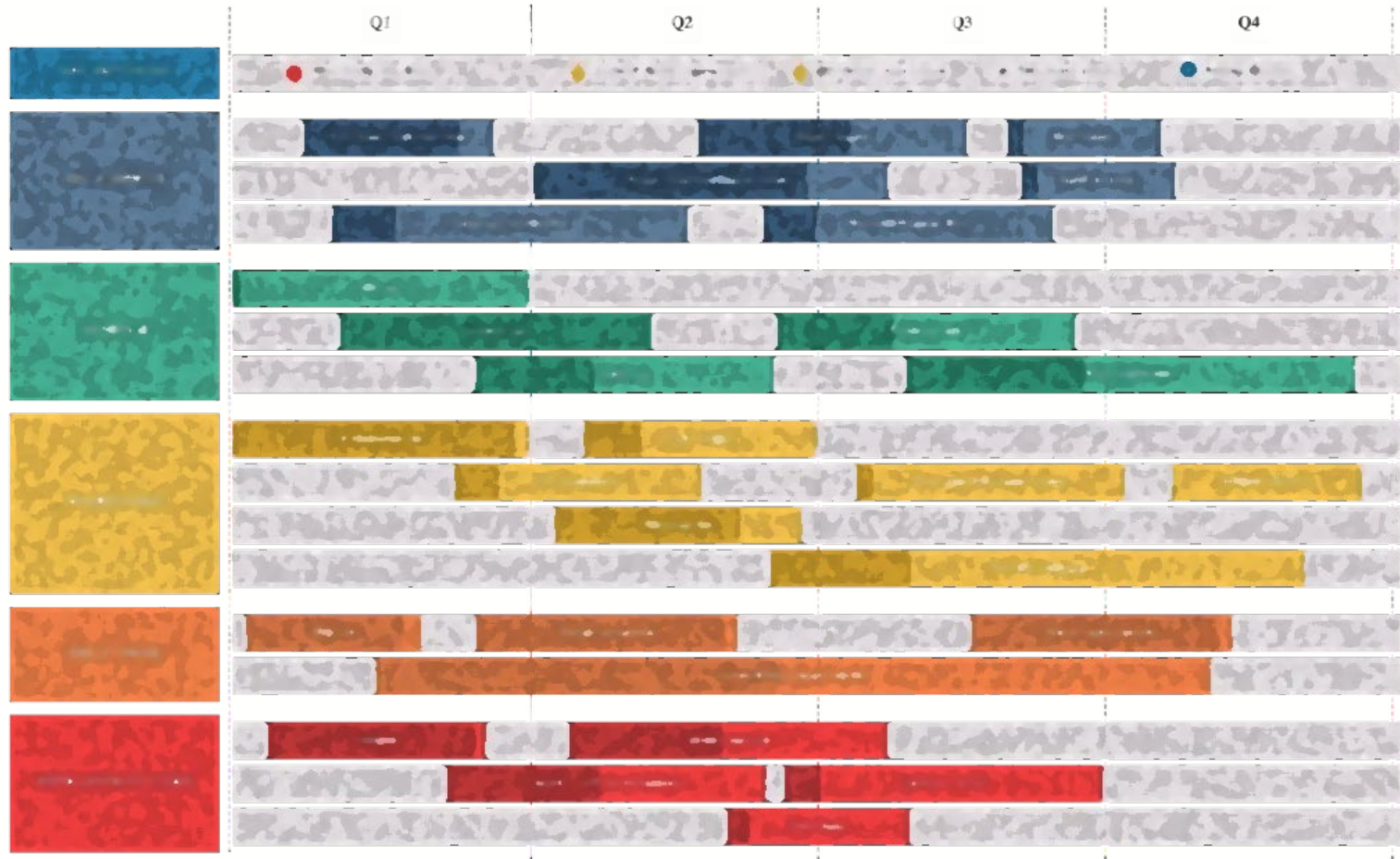
- **Qualitative**

- ❑ Statewide consistency
- ❑ Stakeholder engagement and agency
- ❑ Foster collaboration
- ❑ Achieve standardization
- ❑ Create transparency
- ❑ Streamline and simplify



Diagram

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Supplementary Text

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- High-Level Goal/Initiative
 - Including Baseline Work
- Regulatory Background
- Business Case and Benefits
- Metrics
- Key Stakeholders
- Expected Deliverables, Outcomes and Key Milestones (when?)
 - Key dependencies



Keep to 2 – 3 pages.

Background

- Industry Landscape
- Organization Needs/Goals
- Regulatory Proceedings/Initiatives



Industry Trends

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- Emerging trends in industry? Importance?
 - Decarbonization
 - Summer Reliability
 - Counting GHG reductions; lower emphasis on savings
 - Transition to TSB
 - Data integration
 - More sophisticated data analysis to inform decision-making and programmatic activity
 - Grid optimization
 - Equity
 - 3P Implementation
 - Market Transformation
 - Ongoing need for new tech/new applications
 - Data access



Organizational Needs/Goals

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- What are the emerging challenges and business needs for your organization?
 - More new measures
 - Cost reductions
 - Process efficiencies
 -



Organizational Needs/Goals

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- What are key outcomes or success factors for your organization over next 5 years?
 - Maximize contributions to California's GHG goals?



Regulatory Proceedings

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- What regulatory proceedings/initiatives could effectively leverage Cal TF/eTRM
 - Measure updates
 - Potential and Goals
 - Comprehensive Customer Program Framework
 - Market Transformation
 - EM&V

LUNCH

11:30 – 12:15

Key Goals/Initiatives

Brainstorm

eTRM

- eTRM as repository for all IDSM measures?
- Dashboard showing progress towards GHG reduction goals
- Streamlined data flow
- eTRM as customer-facing/trade ally facing?
- eTRM to enable more sophisticated data analysis?
- eTRM to facilitate “measure journey” through Mkt Tx
- Regional licensing/leveraging?
- Other?



Key Goals/Initiatives

Brainstorm

Cal TF

- Coordinate all measure package development/updating
- Coordinate custom project review/QA
- Standardize/streamline regulatory guidance
- Track measures from inception to market transformation
- Develop common data analytics tools/capabilities to help design/manage/optimize programs



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Key Goals/Initiatives

Maintain/extend Cal TF
+ “Core” activities

- **eTRM Management**
 - Maintenance, Training, Enhancements
- **Existing Deemed Measure Management**
Measure Updates, Analysis + Notifications
- **New Measure Development**
- **Custom Measure Standardization and Streamlining**
- Develop **TPPs** and **White Papers** on Important Industry Technical and Technical/Policy Issues



Success!

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- What successes and contributions will make us all feel proud?



4A Enhanced New Measure Process

- See **4A New Measure ID Strategy** Slide Deck



BP Metric 8C, Workplans

Develop workplans for projects or initiatives as required in the Business Plan

Establish a governance process to approve workplans prior to launching key activities

- Cal TF Workplan Procedure
 - Procedure document describes purpose, content, process, and requirements for affirmation and documentation
- Cal TF Workplan Template
 - Template for developing workplans
- TF affirmed procedure and template in January meeting
- ACT:
 - PAC Affirmation of workplan procedure and template



Cal TF Workplan Procedure

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- Requirements
 - A workplan is required when indicated in the Business Plan.
 - Develop workplans using the Workplan Template.
 - Scale level of detail with scope.
- Affirmation
 - TF affirmation is required for all workplans.
 - PAC affirmation is required only for workplans for which the proposed scope deviates from the approved Business Plan or for which the proposed budget exceeds the Cal TF budget.
- Documentation
 - Document the date of TF (and PAC) affirmation in the workplan.
 - Post the affirmed workplan on the Cal TF website.

Cal TF Workplan Template

WORKPLAN



YYYY BP METRIC XX: SUBJECT

Draft for Cal TF review and affirmation

[Introduce the relevant or proposed business plan activity and proposed/required reviewers]

I. Problem Statement

[Briefly describe the problem or challenge; what is this activity intended to achieve, improve, or resolve? Include quantifiable baseline information where appropriate.]

II. Goals, Metrics, and Objectives

[Specify the goals, metrics, and objectives. Clarify the measures of success, including quantifiable metrics where appropriate.]

Stakeholder Benefits

[Describe how this activity and/or its outcomes will achieve the benefits described in the business plan; include any additional anticipated stakeholder benefits]

III. Scope

[Describe how Cal TF will operate to meet the goals, metrics, and objective (e.g., using an existing or new subcommittee, method(s) for stakeholder input/engagement; data collection and analysis, etc.)]

Deliverables

[list of key deliverables]

Potential Obstacles and Preliminary Solutions

[Describe potential challenges or obstacles (e.g., key stakeholder engagement/participation; required approvals) to completing the work and mitigation strategies/solutions]

WORKPLAN YYYY BP METRIC XX: SUBJECT

IV. Schedule

[Outline the schedule of major milestones and anticipated completion timeframe. For workplans that require a stage-gate process, list the key decision points and required decision makers. Describe any scheduling requirements related to other Business Plan activities or other relevant industry activities or events.]

V. Stakeholders and Team Members

[List the key stakeholders and team members engaged in this activity, and describe the level of effort expected from Cal TF membership]

VI. Budget

[Indicate whether activity budget is within the approved Cal TF budget. If additional funds are required, indicate the additional budget required to conduct the activity.]

VII. Affirmation

[Describe the affirmation requirements and, when affirmed, list the date of affirmation.]

White Paper and TPP Topics

White Papers affirmed
by the TF

Technical Position
Papers (TPPs) affirmed
by the PAC

- White Papers
 - TF Survey on White Paper topics
 - Brainstorm on top 3 topics
 - Continued solicitation of topic ideas
 - TF Affirmation of one topic: Industry Standard Practice (ISP) for Custom
- Technical Position Papers
 - Proposed: Data Integration



White Paper Topics

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Topic	Rank (Score)*
Industry Standard Practice (ISP) Process for Custom Measures/Projects	1 (2.4)
GHG Calculation Approach and Data Sources with Recommendations for eTRM	2 (2.0)
Load Shape Development and Use	3 (1.8)
Analysis Controller to Integrate Energy Plus Prototypes with the eTRM	4 (1.7)
Dual fuel gas and electric measures	5 (1.6)
Integrated Data Flow for Energy Efficiency	6 (1.5)
Measure lifecycle integration into eTRM (Potential and Goals, ETP, EM&V, and C&S)	7 (1.4)
Hybrid Measure (Semi-Deemed) Development	New
Custom Review Process	New
Streamlining Measures – Reducing Number of Permutation	New

* Rank based on **29** unique responses received through **1/18/2023**.

* Topic descriptions and stakeholder comments: [Cal TF White Paper Topic Descriptions and Comments](#) (PDF)

Technical Position Paper

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- Proposed TPP: **Data Integration**
- Seeking PAC feedback on proposed topic
- Next step would be workplan

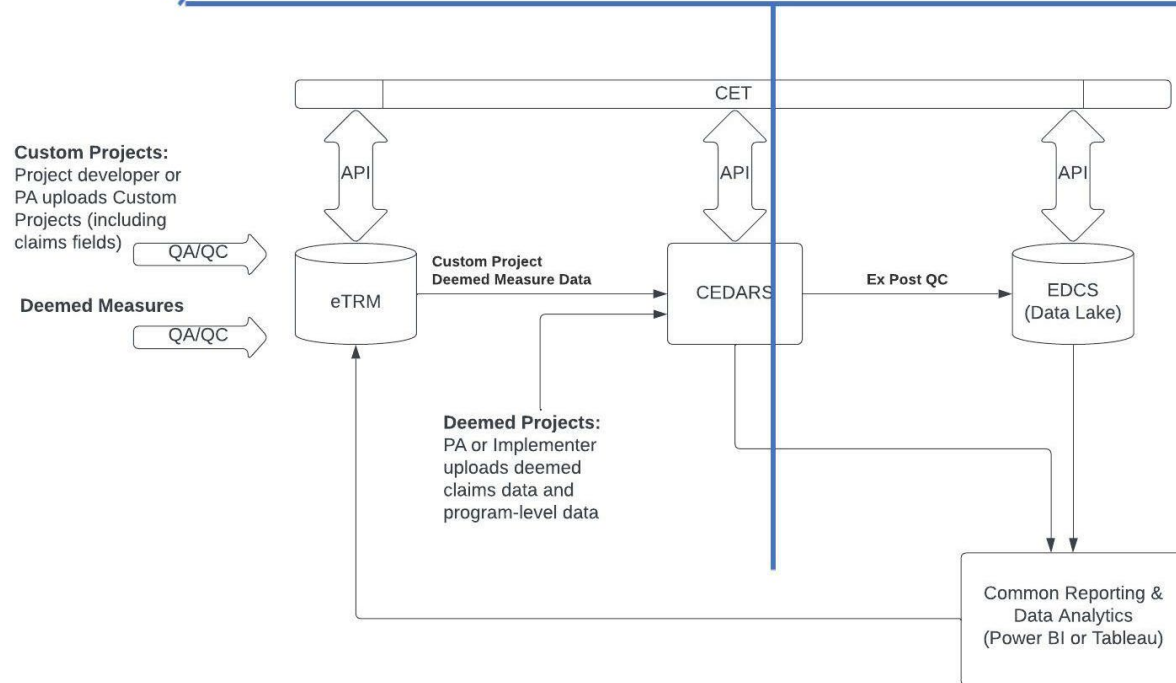
Data Integration (IOU)

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Integrated Data Flow IOU Programs

Modern, User-Friendly, Integrated User Interface

Integrated Stakeholder Advisory Group (through Cal TF)

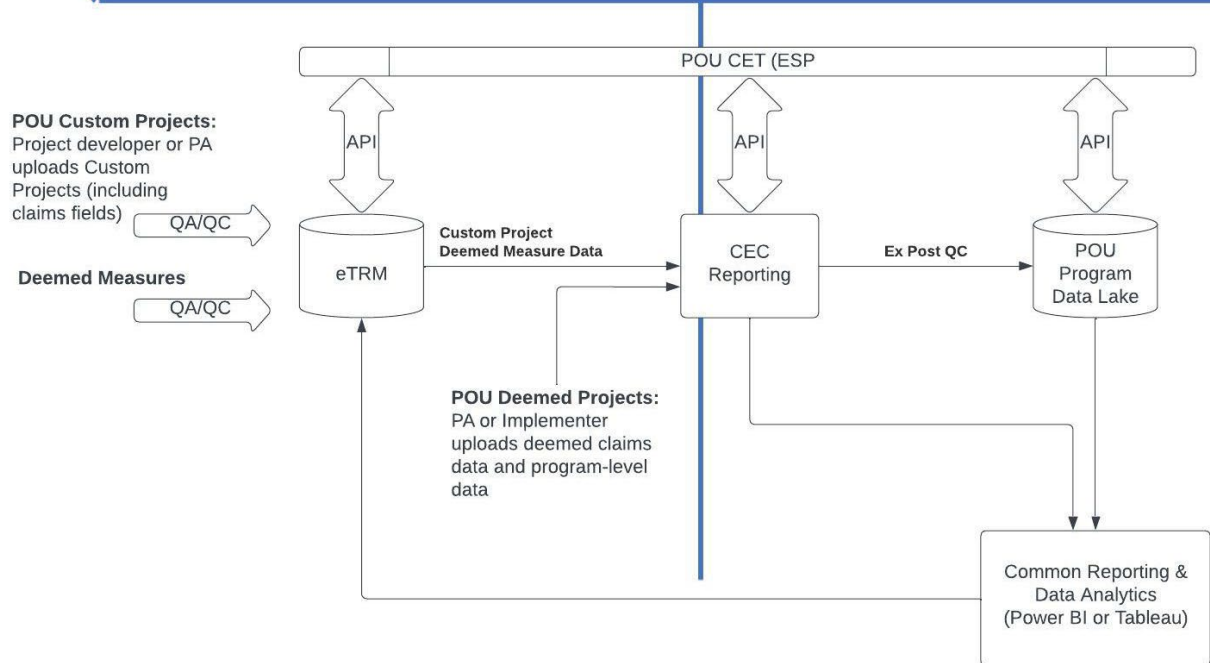


Data Integration (POU)

Integrated Data Flow
POU Programs

Modern, User-Friendly, Integrated User Interface

Integrated Stakeholder Advisory Group (through Cal TF)
POU & CEC



Cal TF and eTRM Governance

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- Do we want to pause and coordinate with CEDARS/CET Governance or move forward?
- Do we want to merge Cal TF and eTRM Governance into one document?
- Should we have a PAC Subcommittee on Governance?

Next Steps

- Action Items
 - TBD
- Next Meeting
 - Friday, April 28
 - 10am – 3pm
 - LACI Building, Los Angeles
- Looking Forward
 - 5-year Cal TF Roadmap
 - Cal TF Governance
 - eTRM Governance