Cal TF Update for the Policy Advisory Committee

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TECHNICAL FORUM

CAL TF STAFF

MAY 13, 2019

Overview

- Introduction – Annette

- Status Update – Measure submission, approval, release - Ayad

- eTRM Training Survey Results – Roger and Jennifer

- eTRM Integration/Launch Strategy – Roger and Jennifer

- eTRM as "Database of Record" - Annette

- DEER 2021 Scoping Memo – Key issues/responses - Annette

- eTRM Governance Document - Annette

- Open Q & A - All
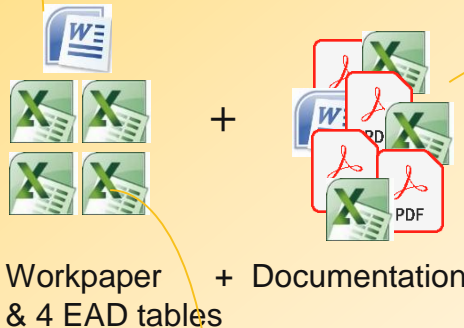
eTRM: Deemed Starting Point

Deeresources.net

Each Utility Measure:

Workpaper & 4 EAD tables   +   Documentation

?

SCG ~60

PG&E ~150

SCE ~150

POU ~50

SDG&E ~100

READI Remote Ex-Ante Database Interface

eTRM: All Statewide Deemed Measures

④

~ **155 Statewide Deemed Measures**

Support Tables

Documentation / Reference Library

Hybrid Measures

Custom Measures

Emerging Technologies

Measure Download of All Measure Data & Measure Summary

Customized Reports

Status Update:
Measure Submission, Approval & Release
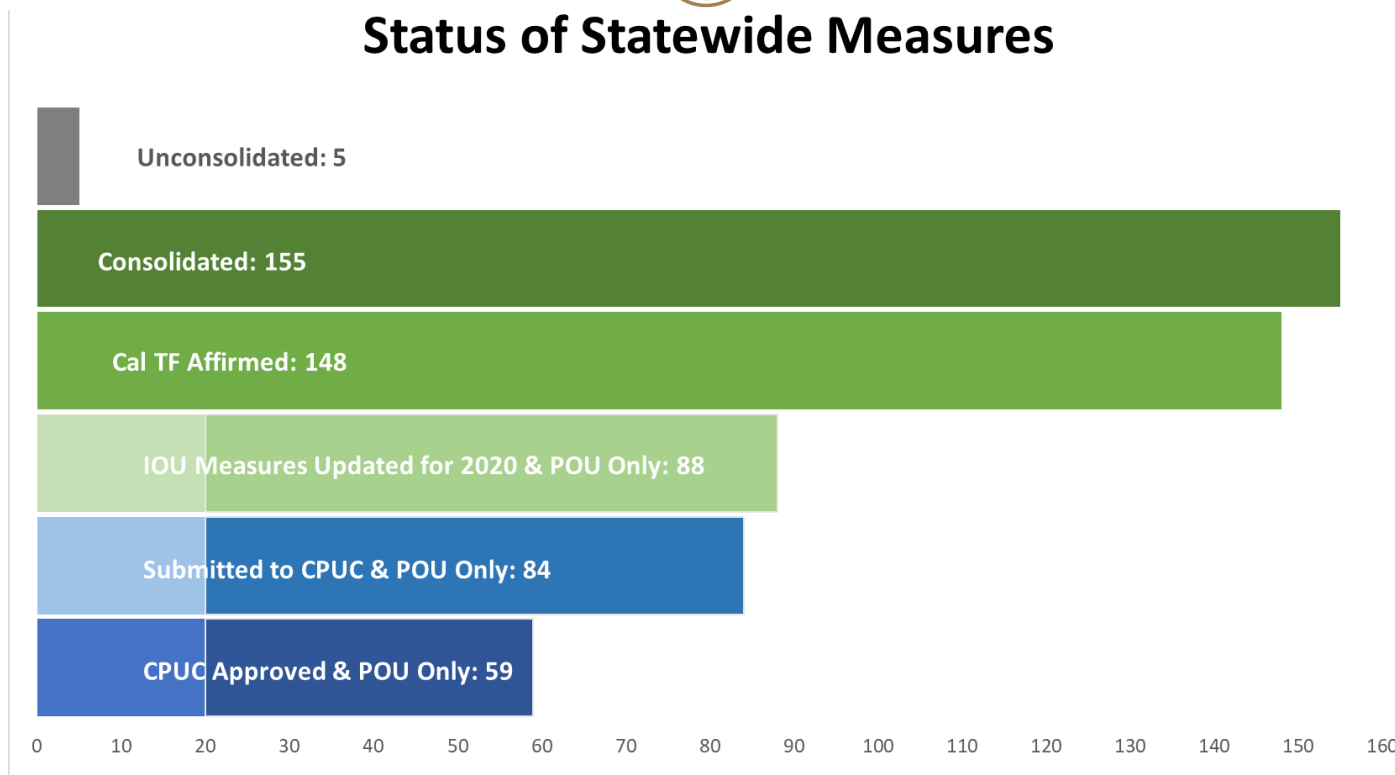
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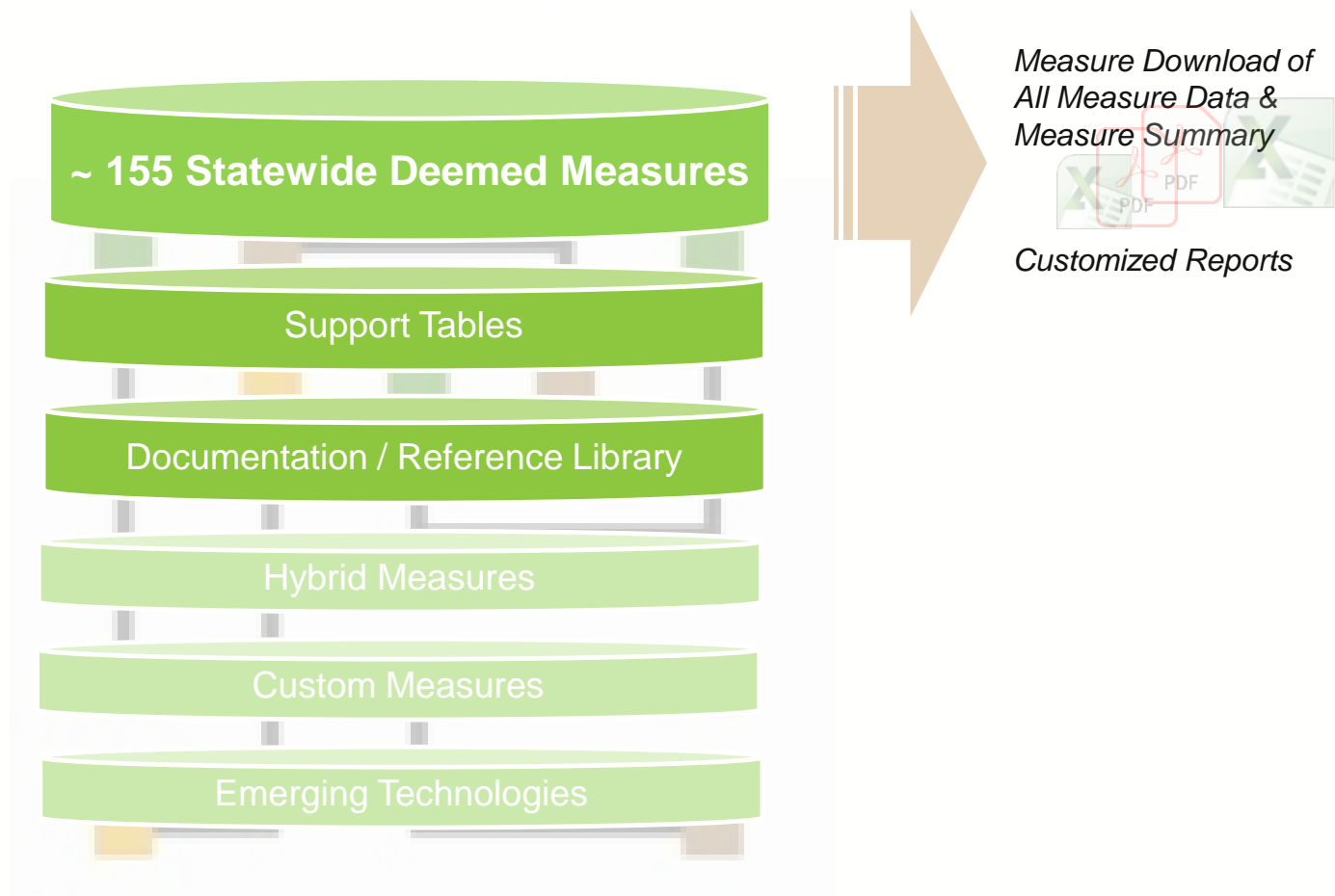
AYAD AL-SHAIKH

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Measure Submission, Approval & Release Update

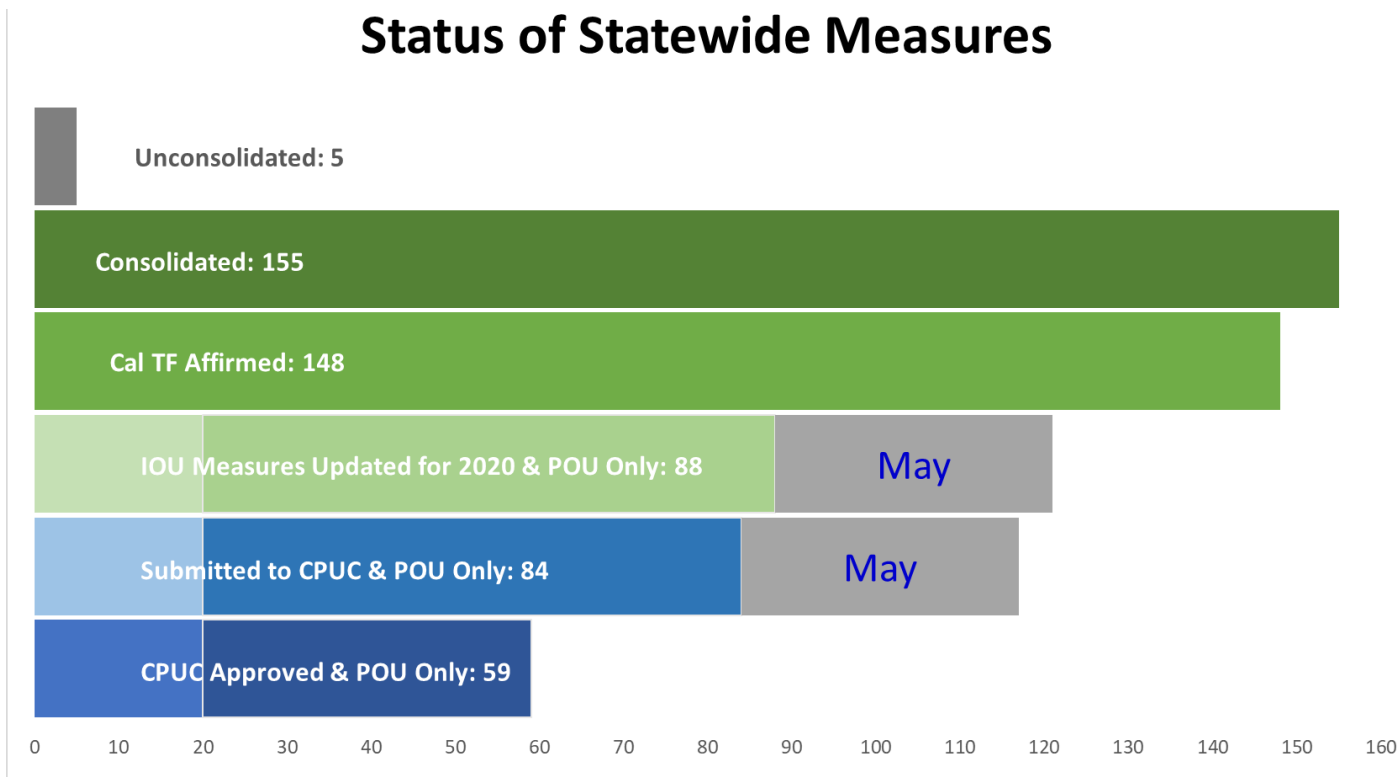## Status of Statewide Measures

- Consolidation is basically complete; new or changing measures remaining
- Affirmation process basically complete; new or changing measures remaining
- POU-only measures complete after Affirmation; could increase by 10-20 more measures
  - Due to retiring IOU measures

Measure Submission, Approval & Release Update

Status of Statewide Measures

- Unconsolidated: 5
- Consolidated: 155
- Cal TF Affirmed: 148
- IOU Measures Updated for 2020 & POU Only: 88 — May
- Submitted to CPUC & POU Only: 84 — May
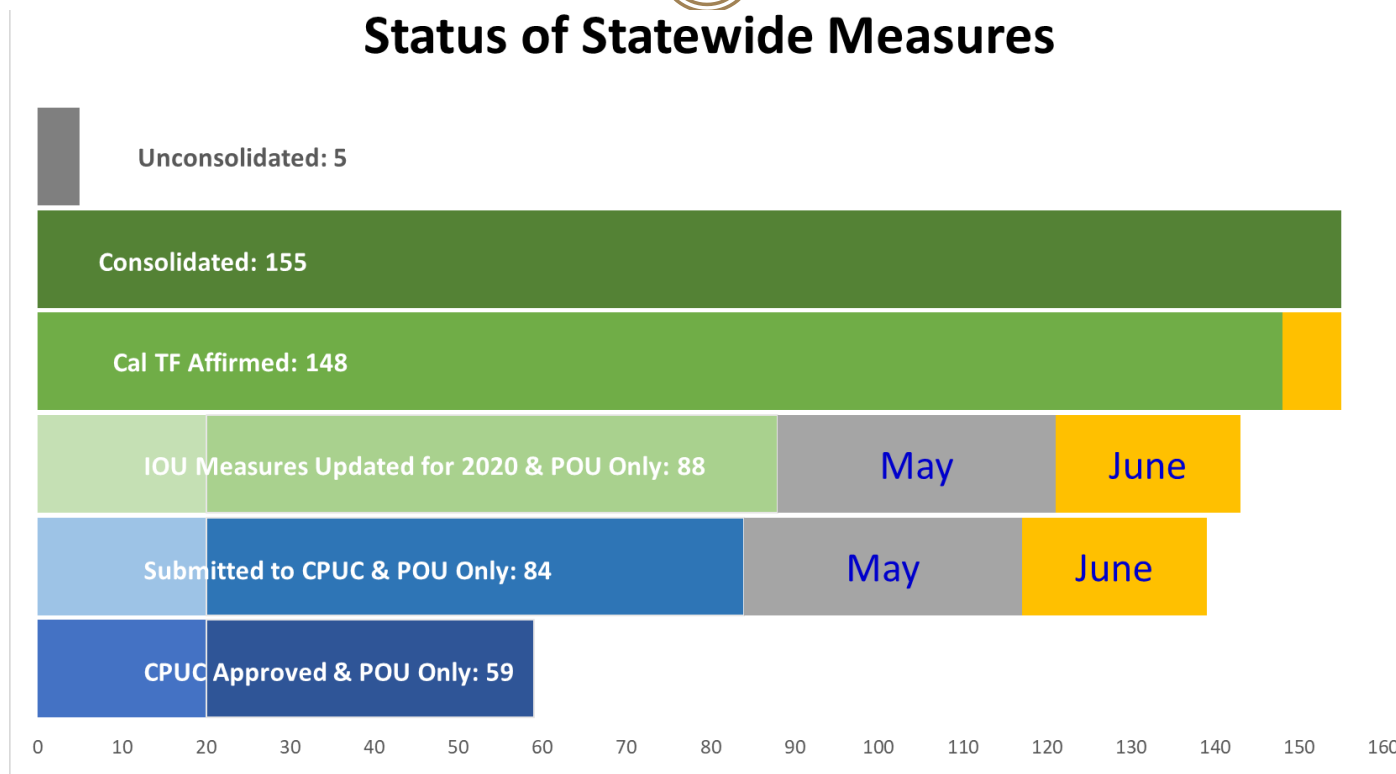- CPUC Approved & POU Only: 59

- **May is scheduled for 33 measures**
  - Primarily HVAC measures

Measure Submission, Approval & Release Update

Status of Statewide Measures

- Unconsolidated: 5
- Consolidated: 155
- Cal TF Affirmed: 148
- IOU Measures Updated for 2020 & POU Only: 88
- Submitted to CPUC & POU Only: 84
- CPUC Approved & POU Only: 59

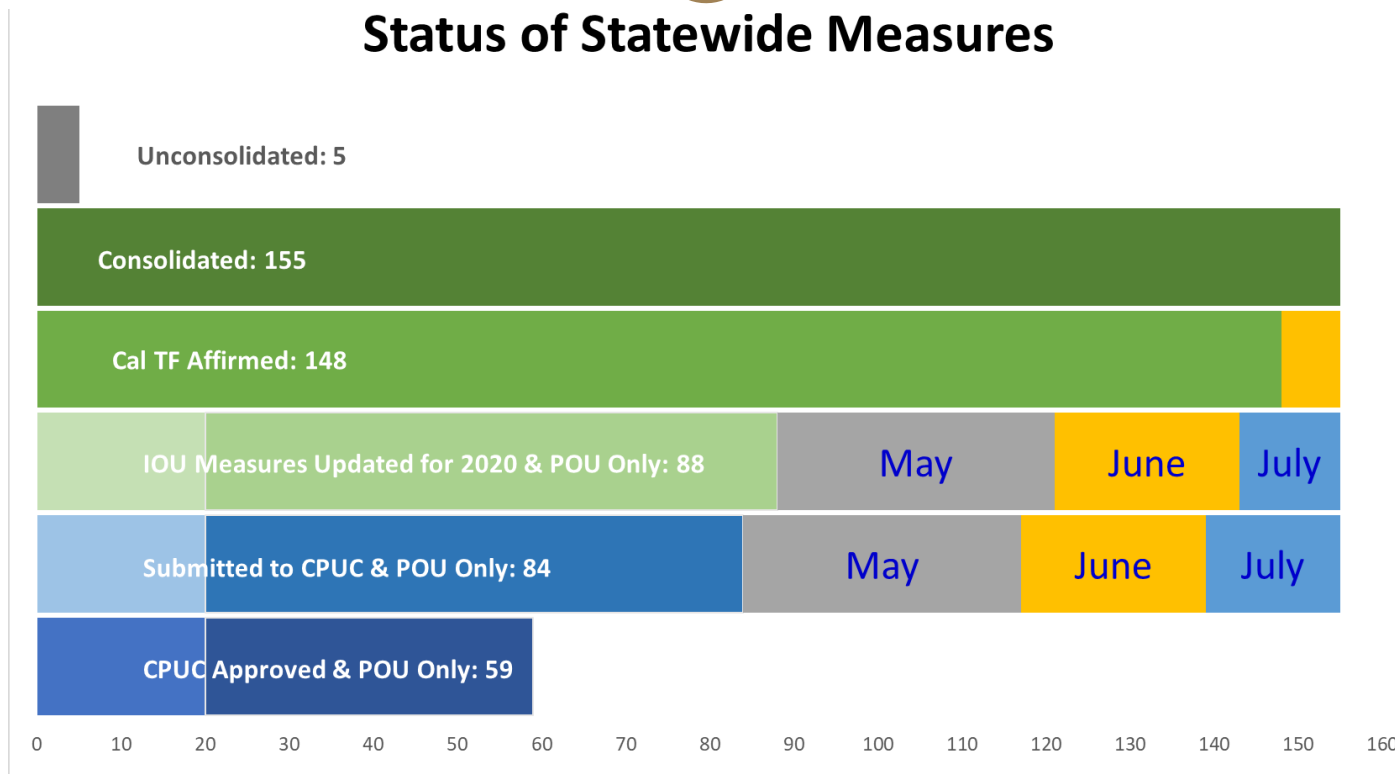- June is scheduled for 22 measures
  - Primarily HVAC measures
  - Final Affirmations will also occur

Measure Submission, Approval & Release Update

Status of Statewide Measures

- **Unconsolidated: 5**
- **Consolidated: 155**
- **Cal TF Affirmed: 148**
- **IOU Measures Updated for 2020 & POU Only: 88** — May, June, July
- **Submitted to CPUC & POU Only: 84** — May, June, July
- **CPUC Approved & POU Only: 59**

(x-axis: 0 10 20 30 40 50 60 70 80 90 100 110 120 130 140 150 160)

- July is scheduled for up to 16 measures
  - Primarily low-saving measures
  - Likely that several of these measures will become POU-only measures

Status of Statewide Measure Upload in eTRM

Statewide Measures, 155

eTRM - Initial Upload: 89

eTRM - QC : 12

eTRM - Measure is Final & Published: 0

- Complete by August:
  - ❑ Data is being uploaded in parallel with submittal to ensure consistency with CPUC submittal
  - ❑ Text characterization and references will continue to include POU only measures
  - ❑ POU measure could become a pool of Accelerated Replacement measures for 3Ps
- eTRM Launch in October 1

eTRM Training Survey Results

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JENNIFER BARNES & ROGER BAKER

MAY 13, 2019

eTRM Training to date

- Four training sessions conducted Q1
  - ❑ Two sessions for Program Administrators & regulators
    - ✕ January 29 & 31, 2019
    - ✕ Half-day, Deep-dive sessions, covering all functional aspects of eTRM
    - ✕ 48 attendees
  - ❑ Two sessions for public
    - ✕ February 21 & March 4, 2019
    - ✕ Via CEDMC (though all were welcome)
    - ✕ More general session
      - ○ One-hour, high-level overview
      - ○ Focused on platform navigation
    - ✕ 82 attendees
- Additional topical sessions to be offered in future
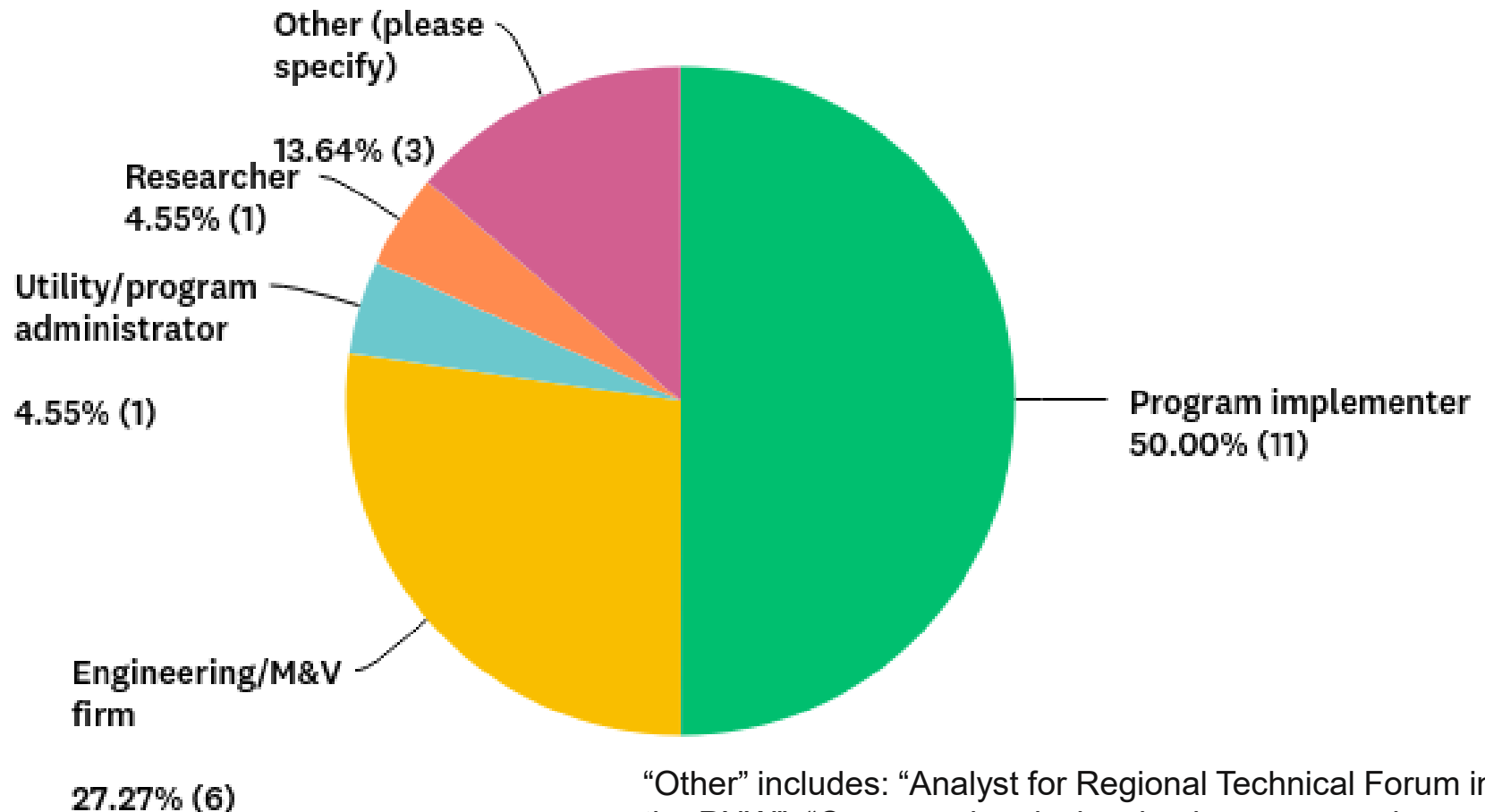 - ○ Measure management
  - ○ Data export and reporting

Survey Overview

- CPUC ED staff requested participant survey

- Purpose was to understand industry acceptance of the eTRM

- The survey consisted of 10 questions covering topics, as follows:
  - ❑ Demographic (1)
  - ❑ DEER usage (3)
  - ❑ Comparison of DEER and eTRM data and ease of navigation (4)
  - ❑ Open-ended to capture verbatim feedback on DEER and eTRM (2)

- 22 survey responses were received (from 82 attendees)

Respondent Role in Industry

Other (please specify) — 13.64% (3)

Researcher — 4.55% (1)

Utility/program administrator — 4.55% (1)

Engineering/M&V firm — 27.27% (6)

Program implementer — 50.00% (11)

"Other" includes: "Analyst for Regional Technical Forum in the PNW", "Cross-cutting design, implementer, evaluator, etc.", and "Advisor"

6/18/2019

Contains Deemed Measure Information

■ The DEER tools/resources contain all the deemed measure information that I/my organization needs to design/implement programs. (Average = 50)

■ The eTRM will contain the deemed measure information that I/my organization needs to design and/or implement programs in California. (Average = 17)
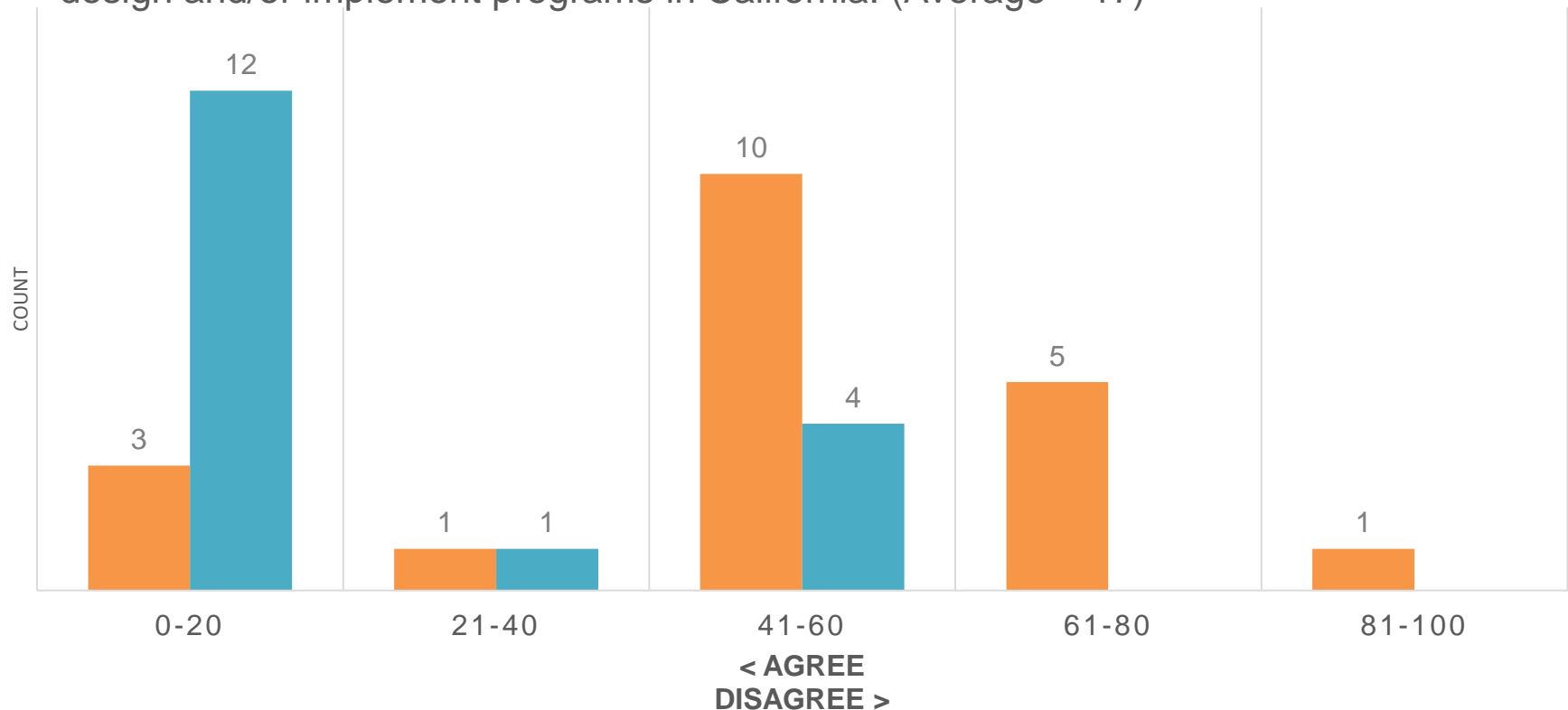
Ease of Navigation

■ Indicate how easy or difficult it is to navigate the DEER tools/resources to find the deemed measure information you are looking for. (Average = 73)

■ Indicate how easy or difficult you think it will be to navigate the eTRM to find the deemed measure information that you are looking for. (Average = 22)
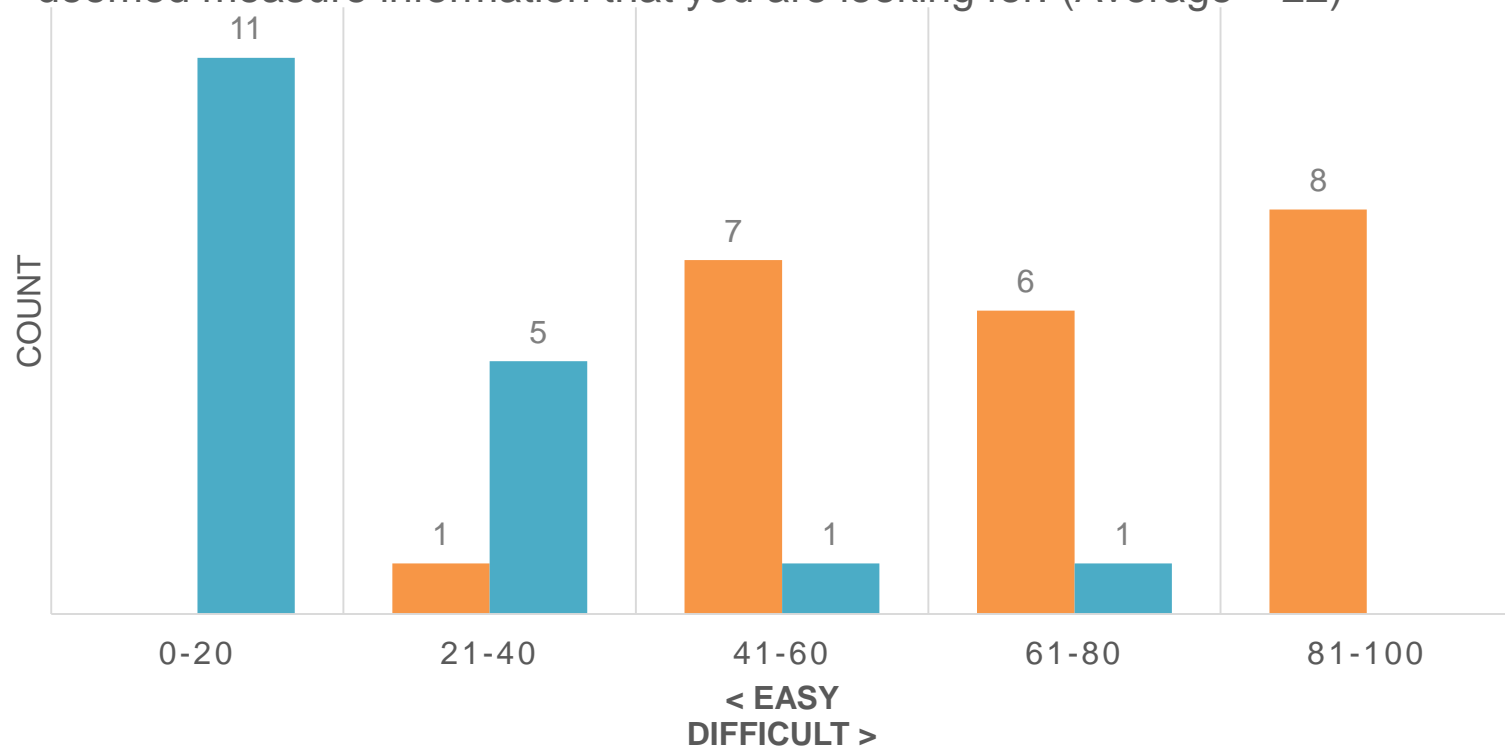
DEER Verbatim Responses

Comment on your overall experience using the DEER tools/resources. What features/aspects do you find useful? What features/aspects are not working well?

"Hard to navigate: difficult to search without knowing exactly what you're looking for in advance. Difficult to trace references."

"Work papers are confusing to navigate. Column headers are repetitive and make it unclear which values to utilize."

"User interface is absolutely terrible. Impossible to use without significant training. Not transparent, assumptions not clear, source information not clear. Does not inspire trust in the quality of the information."

"There is very minimal back-up documentation for DEER measures. For IOU measures the work papers are not consistent. Very tough / almost impossible to trace the rationale behind lor of DEER numbers/ assumptions."

eTRM Verbatim Responses

Comment on the eTRM content and functionality.
What features/aspects do you think will be useful? What additional features/aspects would you like to see?

"The design of the system looks great. Being able to follow citations easily, and see data tables will be very useful…"

"Seeing the actual calc methodology is helpful."

"The reference tags/flags look like they will be useful."

"It looks fantastic from the training…I'd prefer to use this than the other DEER resources."

"Looks easy to use. Hoping to be able to integrate with other tools via the API to automate savings calculations."

"Central repository and CalTF's effort to source back-up documentation will help. I am assuming CalTF is going to do similar work on DEER measures which may not have IOU workpapers."

eTRM Integration/Launch Strategy

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ROGER BAKER & JENNIFER BARNES

MAY 13, 2019

eTRM Integration Plan

- Purpose is to ensure that IOU requirements for using the eTRM are identified & met
- Cal TF staff met with IOUs to understand:
  - ❑ Databases/systems that need to integrate with the eTRM
  - ❑ Mechanism to feed eTRM measures into IOU systems
  - ❑ Level of automation available to support data transfers
  - ❑ Additional needs from eTRM development to support transition
- Developed proposal for integration with CEDARS & CET
- Draft plan will be delivered to ED Staff in July

Launch Strategy Goals

Communications

Ensure that the industry, and especially the 3P implementers are aware of the availability of SW consolidated measures so they can leverage the information as they prepare their proposals

Training

Ensure that industry actors will be able to capably use the eTRM

Help/Support

Ensure that resources are available to respond to user issues or answer questions

eTRM Launch Communications Plan

- Publish a list of the SW consolidated measures and announce the release date
  - ❑ October 1
  - ❑ Post on eTRM homepage
- Promote schedule release through:
  - ❑ CEDMC newsletter & announcements on policy & EM&V calls
  - ❑ CAEECC
  - ❑ PEPMA
  - ❑ CPUC Service List
  - ❑ Cal TF:
    - ✖ Email lists
    - ✖ Social Media (Linked In)

eTRM Launch Training Schedule

- Series of training sessions covering:
  - ❑ General eTRM Use
    - ✖ Accessing the eTRM
    - ✖ Navigating the eTRM
    - ✖ Exporting data from the eTRM
  - ❑ Customizing Data Exports
    - ✖ Measure Reports
    - ✖ Permutation Reports
    - ✖ Report Subscriptions
- September, October, November timeframe
  - ❑ 1-2 of each session type per month

eTRM Launch Help Desk

- Support available through a help desk:
  - ❏ Available Monday through Friday, 8:00 a.m. to 6:00 p.m. PDT
  - ❏ Will cover eTRM access issues
  - ❏ Anticipate a wide range of topics beyond eTRM use
    - ➤ Measure-specific and technical issues may need to be addressed by the IOUs and/or CPUC
    - ➤ Will work with IOUs and CPUC to ensure there is a contact available & method for addressing promptly

eTRM as "Database of Record"

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eTRM as "Database of Record"

- Clear CPUC directive contained in the Phase 2A decision in the Rolling Portfolio proceeding:

  - ❑ We direct the PAs to work with stakeholders **to jointly investigate and propose potential solutions to Commission Staff to improve the usability and transparency of all ex ante values**. The solutions may include **new software tools** that offer a **common platform** for all PAs to compose savings estimates transparently and consistent with Commission direction. **Proposals should be focused on opportunities to facilitate transparency and collaboration**. Proposals should specify the expected outcomes from the proposals and how they will improve the process to develop, review, and implement ex ante values.

  - ❑ Any proposal must recognize that Commission staff is still responsible for review and approval of ex ante values and methods and that past and current ex ante guidance still pertains. (D.15-10-028, pp. 97 – 98).

eTRM as "Database of Record"

- Proposal to Staff to use eTRM values starting 1/1/20
  - ❑ Work with Staff to draft
  - ❑ Signed by IOUs, POUs, and multiple stakeholders
  - ❑ Any future updates to statewide measures in eTRM
  - ❑ Staff approves in writing

- Motion to ALJ or CPUC seeking ruling that eTRM, which is repository of deemed statewide measures, is the "Database of Record."
  - ❑ Ask for name change at the same time . . .

DEER 2021 Scoping Memo

ANNETTE BEITEL

MAY 13, 2019

Draft DEER 2021 Update Scoping Memo

- FUNDAMENTAL MISUNDERSTANDING IN SCOPING MEMO:

  - DEER Measures are SUBSET of Statewide Consolidated Measures that are currently ALL being submitted for ex ante team review and approval, not a SEPARATE set of measures

  - Also, DEER Measures are not supposed to be used unless a WP is created. **Thus, consolidating all active WP incorporates all active DEER measures**

- Commission Directive:

  ED should "Create a Single Website for all Commission- adopted ex ante values"

  (D.11-07-030, pp. 27 and 49.)

Draft DEER 2021 Update Scoping Memo

- ## Draft Scoping Memo: Catalog all active DEER Measures

  Response:
  Cal TF Staff has completed this, and updates on monthly basis (SW Measure list).

- ## Draft Scoping Memo: Review and document all active DEER Measures

  Response:
  Cal TF Staff has completed this – some gaps for DEER HVAC measures. What's missing?

  - HVAC base case – measure case key word changes
  - Document assumptions for DEER building prototypes
  - Document calibration of DEER building prototypes and modeled DEER measures, even generally
  - Limited missing references for parameters, but Cal TF Staff has tracked down most references

- Draft Scoping Memo: Remove all old DEER Measures

  Response:
  eTRM is repository for all active and future measures; DEER should be maintained as a historical archive

- Draft Scoping Memo: Get more measures back into DEER, with goal of reducing number of Workpapers

  Response:
  eTRM does not have any functional distinction between "DEER" and "Non-DEER" measures . . .all built using same eTRM Data Specification (text and data elements)

- Draft Scoping Memo: Overhaul the deeresources.com website . . .(p. 6)

  Be more valuable than all the other updates combined as it would document key assumptions and processes and could expose old data and information that is no longer necessary. *Due to the magnitude and scope of this effort, it would need to be multi-year effort* and the *first step would be identifying where the system is truly broken* ... [Emphasis added.]

    Response:
    Cal TF Staff systematically documented how DEER is broken, and worked with a broad range of stakeholders (IOUs, POUs, implementers, CEC and CPUC) to develop and socialize BRs and TRs for eTRM to address all issues in DEER and take advantage of modern relational database software.

    eTRM development took one year and cost $650,000.

Draft DEER 2021 Update Scoping Memo

- Draft Scoping Memo: Revisit the need for both DEER and PEAR

  Response:

  CA only needs one database for ex ante values . . .the eTRM

- Draft Scoping Memo: Fix READi or develop a web interface to access ex ante values

  Response:

  eTRM has a web interface to access all ex ante values

- Draft Scoping Memo: Staff will research, review, refine and clearly document the DEER data spec

  Response:

  Cal TF Staff already reviewed, refined (eliminated unnecessary fields, added those useful to others), and clearly documented all remaining fields through iterative process involving a broad range of stakeholders (including CPUC staff) . … the result is the eTRM Data Specification that staff has said should be used for the SW Measures and has been used to build all Statewide Deemed Measures that are currently being reviewed by ex ante consultants

Cal TF Staff Recommendations

- Ex ante consultants to work with Cal TF to identify and fill any remaining data gaps (particularly with modeled measures, documentation and calibration for DEER building prototypes and measures)

  - ❑ Cal TF Staff can work with IOUs to develop a complete list of data gaps that the ex ante consultants could productively fill

- Future Updates to Statewide Deemed Measures should be in eTRM

  - ❑ To take advantage of modern relational database features and transparency inherent in eTRM design

- Work with Cal TF Staff, IOUs, and Other Stakeholders to Develop plan to Switch from DEER to eTRM

  - ❑ "Integration/Launch Plan" – draft mid-July (Roger and Jennifer B.)

- Work with Cal TF Staff, CEC, and CPUC leadership and leadership at funding organizations to develop an eTRM Governance Document
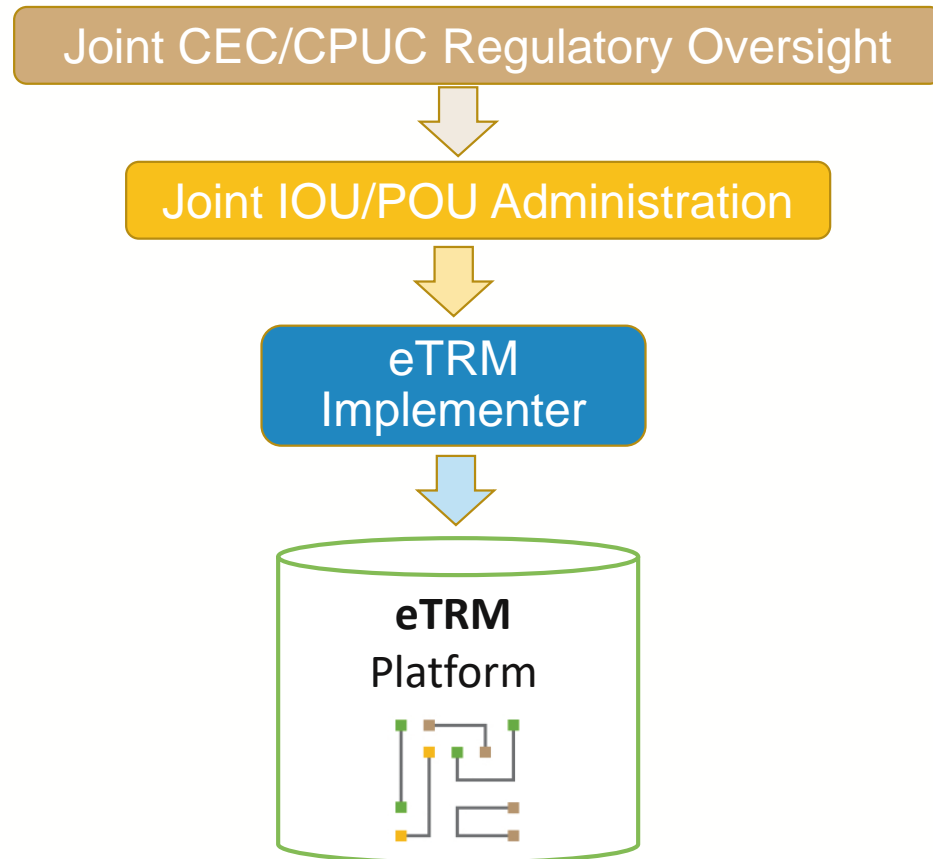
eTRM Governance Document

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MAY 13, 2019

Platform Governance

Joint CEC/CPUC Regulatory Oversight

⬇

Joint IOU/POU Administration

⬇

eTRM
Implementer

⬇

eTRM
Platform

Elements of eTRM Governance

- Joint eTRM oversight/regulation by the CPUC and CEC (as was originally the model for DEER)

- Processes and timelines consistent with the "Bus Stop" for deemed measure development by all market actors – IOUs, POUs, and 3Ps

- Processes and timelines with the "Bus Stop" for deemed measure updating by ex ante consultants and other market actors (after review and approval by the ex ante consultants)

- Process for identifying and creating enhancements and extensions to the eTRM to keep up with evolving regulatory requirements and market wants and needs.

PAC Input & Discussion

38

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- PAC Q&A
- PAC Comment