

**Request for Qualifications**

Technical Forum Members

2019-2020

Release Date: Tuesday, May 7, 2019

Questions Due: Monday, May 20, 2019

**NOTE: Cal TF has extended the deadline for submitting a**

**response to July 10, 2019 at 5 p.m. PDT. All other requirements apply.**

**Responses Due: Wednesday, July 10, 2019 at 5 p.m. PDT**

Contact email: jennifer.barnes@futee.biz

**Request for Qualifications for the California Technical Forum (Cal TF)**

**Technical Forum Members (TF Members)**

Responses Due: Wednesday, July 10, 2019 at 5 p.m. PDT

Via email to jennifer.barnes@futee.biz

**A. Overview**

This Request for Qualifications (“RFQ”) is to solicit technical experts who are qualified to provide peer review of energy efficiency savings estimates and other measure parameters to serve a nearly two-year term on the California Technical Forum (Cal TF). The Cal TF is a collaborative process that is intended to be a national model for reviewing and approving technical information related to California’s Integrated Demand-Side Management (IDSM) portfolio. The process seeks to yield values and other technical recommendations that are:

* Technically rigorous and balanced
* Statewide consistent, and usable by all California Program Administrators and Implementers
* Well-documented and transparent

The Cal TF has participation from key energy efficiency stakeholders, including: the California Investor-Owned Utilities (IOUs), California Publicly-Owned Utilities (POUs), a Regional Energy Network (REN), an environmental group (NRDC), implementer representatives (the California Efficiency and Demand Management Council and the National Association of Energy Services Companies), state agencies (the California Energy Commission (CEC)), and the Office of Ratepayer Advocates.

Cal TF has recently completed the development of a “Best in Class” Electronic Technical Reference Manual (eTRM), a repository for California’s deemed measures. The project was initiated in January 2017 and was launched in January 2019. During the remainder of 2019, Cal TF will work with the IOUs to secure authorization of the statewide consolidated measures by the California Public Utilities Commission (CPUC) and publish these measures to the eTRM. In addition, Cal TF is seeking to resolve 12 to 14 high-priority issues identified by the Cal TF members during the consolidation process. Other projects that the Cal TF will pursue in 2019 include advancing a statewide consistent approach to energy modeling, identifying enhancements to the eTRM, and recommending prospective savings values for use by the IOUs’ Energy Savings Assistance programs. The 2019 Cal TF Business Plan can be found on the Cal TF website: [www.CalTF.org](http://www.CalTF.org).

**B. Mission and Vision**

The Cal TF is a collaborative of experts who use independent professional judgment and a transparent, technically robust process to review and issue technical information related to California’s IDSM portfolio. The Cal TF was created in 2014 by a broad group of stakeholders and is funded by participating program administrators, including both the California IOUs and California POUs.

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.

Vision

Be a respected source of California energy efficiency savings estimates and other technical information related to California’s IDSM portfolio.

**C. Cal TF Work**

The Cal TF was originally created as a forum for independent peer review of new energy efficiency measures. In its first two years, the organization reviewed over twenty innovative measures. The group also created Technical Position Papers (TPPs) on how to implement the CPUC’s “Best Available Data” standard, minimize unnecessary complexity, and capture energy efficiency potential “stranded below code” in existing buildings, among other items. In addition, Cal TF documented several process and structural inefficiencies in California’s current measure review, updating and maintenance processes and tools; this work led to the Cal TF’s Electronic Technical Reference Manual proposal.

**Cal TF’s Electronic Technical Reference Manual (eTRM)**

In 2017, Cal TF launched a project to develop a new statewide electronic Technical Reference Manual (eTRM) to host all California deemed measures and the associated documentation for each assumption and parameter in a single repository. We also developed clear, easily applied guidelines for measure development to ensure that all measures meet the same standards for rigor and accuracy. Concurrently, Cal TF undertook an effort to consolidate individual IOU workpapers into approximately 150 single, statewide consistent measures. The eTRM was launched in January 2019 and will be populated after the consolidated measures are approved by the CPUC.

**D. TF Member Work Duties and Time Commitments**

Cal TF Members will be asked to review, comment and affirm technical work product in three areas:

* Subcommittees – Cal TF members will form subcommittees (coordinated by Cal TF staff) to investigate and advise on various issues of interest. For 2019, Cal TF members have identified 12 to 14 high-priority issues to address from the statewide measure consolidation process. Subcommittees will be formed to discuss many of these issues and devise a path towards resolution. Resolutions may be for the development of a Technical Position Paper, conducting analysis to support policy changes, or updating measure workpapers.
* Technical Position Papers – Cal TF Staff will develop “Technical Position Papers” (TPP) on topics related to Cal TF’s work. TPPs help ensure that Cal TF addresses technical issues that recur over time in consistent and analytically sound ways.
* New Measures – Cal TF will review any new measures submitted by the IOUs or implementers to the Cal TF. TF Members will review, comment on and seek to reach consensus, where possible, on energy efficiency measure-level savings and other measure-level parameters. The measure-level parameters can include energy and peak demand impacts, expected useful lives, net-to-gross ratios, incremental costs, and data sources and/or methodologies.
* Consolidated Measures – If new measures are developed by third-party implementers that only cover individual IOU service territories, the Cal TF will undertake a process to consolidate these measures into a single, statewide-applicable measure prior to placement in the eTRM. Cal TF staff will review the measures, then solicit Cal TF feedback and affirmation on how to address and resolve differences prior to placement of the measure in the eTRM.

TF Members will be expected to review and comment on technical information and participate in a monthly day-long meeting to discuss and resolve, through consensus decision-making, measure-level energy savings and other relevant measure parameters. New TF members are also expected to participate in a two-hour, web-based training in preparation for their first meeting, which would likely be in August 2019.

TF Member time commitment is expected to be the following:

* Attend Meetings:

In 2019, the Cal TF will meet monthly with the exception of June and August, 2019.[[1]](#footnote-1) Included for reference is Attachment C: 2019 Cal TF Meeting Schedule. Beyond 2019, the meeting frequency will be subject to change to adapt to accommodate the Cal TF’s function and workload. For instance, in-person meetings may be held every other month if the Cal TF performs more work through subcommittees, which meet via telephone.

California-based members are expected to attend 80 percent of the meetings in person, while out-of-state members are expected to attend half of the meetings in person. Cal TF meetings are generally held in San Francisco, CA at the Pacific Energy Center, or in Los Angeles, CA at the La Kretz Innovation Center. We also strive to hold one meeting annually in Sacramento at the California Energy Commission.

* Pre-Meeting Preparation:

Prepare for monthly meetings by reviewing material that is circulated in advance.

* Workpaper (or Equivalent) Peer Review (1 Workpapers):

Perform detailed peer review of at least two measure workpapers or equivalent written documents each year. Members will be asked to be among the assigned peer reviewers for individual work products based on the member’s areas of interest, expertise and availability. The names of all peer reviewers will be explicitly noted in each work product.

* Subcommittee Work (1 Subcommittee):

Participate in subcommittee meetings to:

* + Review draft workpapers for new or updated statewide measures and provide technical input as the workpaper is developed.
	+ Participate in crosscutting technical position subcommittees leading to the development of “Technical Position Papers” for review and affirmation by the full TF.

TF Members will participate in the Cal TF in an individual capacity and not as a representative of their affiliates, organization or business. In addition, TF Members will need to identify to Cal TF staff whether they have a conflict of interest related to specific technical matters discussed through the Technical Forum.

Service on the TF is voluntary and unpaid. All members will be asked to commit to participation through December 2020, with the term starting in September 2019.

**D. TF Member Benefits**

While participation is voluntary and uncompensated (except for travel expenses for select members, as described below), TF Members will be making important contributions to the evolution and future of California’s energy efficiency portfolio. In addition, they will have the opportunity to:

* Promote transparency and collaboration in measure development and assessment;
* Learn about and help analyze new and innovative measures;
* Recommend new measures for consideration in the California portfolios;
* Meaningfully engage with other technical experts with a broad range of skills, experience and perspective;
* Participate in drafting recommendations on crosscutting technical issues that impact California’s energy efficiency portfolios; and
* Contribute to further strengthening a national model for reviewing and approving ex ante values that are technically rigorous, well documented and unbiased, neither overly conservative or optimistic.

**E. Eligibility Criteria**

Applicants should have the following qualifications to serve as a TF Member:

* Education

Educational background (and preferably an advanced degree) in engineering or science that would provide the knowledge needed to competently review energy savings estimates.

* Energy Efficiency Industry Experience

Applicants must have at least five (5) years of experience in the energy efficiency field, which may include, but is not limited to, energy efficiency portfolio and/or program administration, design, implementation, or evaluation.

* Professional Experience/Direct Expertise

Experience reviewing energy use and energy savings estimates for energy efficiency measures.

* Other

Prior experience with energy efficiency-related collaborative efforts is sought but not required.

Based on the expected needs in 2020, Cal TF encourages applications from, and will prioritize member selection for, participants with qualifications in one or more of the following areas:

* Measure development of either deemed or custom measures
* Computer modeling of energy savings estimates, in particular, DOE 2.2 and EnergyPlus
* California and federal codes and standards
* Statistics and/or data science, including normalized metered energy consumption
* Estimating impacts from behavioral measures
* Evaluation, measurement and verification (EM&V), with emphasis on study design and review

**F. TF Member Restrictions, Requirements, and Conflicts**

By participating on the Cal TF, certain restrictions, requirements and conflicts apply, as follows:

* **Use of Best Independent Professional Judgment, Not Professional Interest**

Technical Forum Members must agree to provide technical comments based on their best professional judgment rather than their organizational interests.

* **Code of Independence/Code of Conduct**

Technical Forum Members must review and abide by the attached Code of Independence/Code of Conduct.

* **Disclosure of Direct Financial Interests**

Technical Forum Members must disclose to the Cal TF Facilitator, prior to discussing a Workpaper or other technical information, whether they would personally, directly financially benefit based on the outcome of the discussions on the technical information.

* **Subsequent CPUC Contracts**

Technical Forum Members are restricted from bidding on any work they recommend to the CPUC based on California Government Code 1090 (Section 1090). Because Section 1090 is broadly construed, the CPUC analyzes conflicts cautiously and on a case-by-case basis. Energy efficiency work that the CPUC bids out includes evaluation, measurement and verification (impact assessments), maintaining and updating DEER, and custom project review. However, given that the Cal TF is advisory to the Program Administrators and not the regulators (the CPUC), the only contracts expected to be affected by this conflict provision are those involving evaluation work bid out directly by the CPUC that is recommended by the TF.

**G. Submittal Requirements and Process**

At this time, Cal TF Staff does not know how many new TF members will be selected for participation through this solicitation. Current members are allowed to continue serving. We expect to select between 10 to 15 new members through this solicitation.

Qualified and interested individuals willing to commit the necessary time to participate as a TF Member shall submit the following information:

1. **Cover Letter:** A letter of interest, which includes a statement of why the applicant would like to be a TF member. The letter should also include contact information, including name, title, organizational affiliation, address, phone, and e-mail.
2. **Resume:** The resume should identify relevant experience, and time periods of relevant experience.
3. **Cal TF Application Supplement:** The attached Cal TF Application Supplement (Attachment A), completed with the following information about the applicant:
	* Recent Technical Publications/Projects: A listing of recent (past three years) relevant technical publications and/or projects in which the applicant played a significant technical role.
	* Experience in the Energy Efficiency Industry: Number of years that applicant has worked in the Energy Efficiency Industry. The meaning of “worked in the energy efficiency industry” includes portfolio or program design, administration, implementation, and evaluation.
	* Experience with Developing Energy Use and Demand Savings Estimates: Whether applicant has been involved in developing or reviewing energy use and demand savings estimates. State the number of years applicant participated in the development and/or review of such values.
	* Collaborative Experience: Whether the applicant has participated in an energy efficiency-related collaborative, the name of the collaborative, and number of years participated.
4. **Request for Compensation:** Request for compensation for travel expenses. TF Members who are retired or working for a non-profit entity will be considered for travel expense re-imbursement. Applicants should identify whether their participation is contingent upon receiving reimbursement for travel costs.

Below is information about the proposal due date, time due, and method for submission:

Due Date: Wednesday, July 10, 2019

Time Due: 5:00 pm Pacific Daylight Time

Email: jennifer.barnes@futee.biz

Email Subject Line: Cal TF Member Applicant

**H. Question and Answer Period**

Applicants may submit questions until Monday, May 20, 2019 via email to jennifer.barnes@futee.biz. All applicant questions will be answered and will be shared with other applicants. Applicants may receive follow-up questions on the material they submitted.

A webinar to address prospective respondents’ questions will be held on Thursday, May 16, 2019 from 1:30 p.m. to 2:30 p.m. PDT. Please register for Cal TF New Member RFQ Q&A Webinar in advance at:

<https://attendee.gotowebinar.com/register/6553938523071935490>

After registering, you will receive a confirmation email containing information about joining the webinar.

**I. Proprietary Materials**

Applicants should clearly identify any proprietary information included in their submittal. Any information identified as confidential will be held in confidence but may be shared with the response reviewers.

**J. Evaluation Goals, Criteria and Process**

The Cal TF will select TF Members who, together with continuing Cal TF members, collectively bring a balance of industry technical expertise (measure development, modeling, etc.), sector experience (e.g. commercial, agriculture, etc.), and technology focus (e.g. lighting, HVAC, etc.).

Responses will be evaluated by the Cal TF committee responsible for selecting the TF Members. Evaluators may include members of the Cal TF Policy Advisory Committee or their designees[[2]](#footnote-2) as well as current Cal TF members. Responses will first be evaluated and numerically ranked based on the Eligibility Criteria, above (Section E.). Applicants will then be considered comprehensively to ensure the final TF Membership represents a fair balance in terms of technical expertise, sector experience, and technology focus.

During the Cal TF review period, a Cal TF committee member or staff may contact the applicant to ask questions, seek clarification of submitted material, or to seek additional information. Applicants from organizations who already have a TF Member that wishes to discontinue participation will receive priority, assuming the applicant from the organization is qualified.

**K. Terms of Service**

TF Members will serve through December 2020. After the initial term, the TF Member may be re-appointed. TF Members may resign at any time but should not apply unless they are committed to completing the term of their appointment.

**L. Obligations**

TF Members must review and agree to abide by the Code of Independence/Code of Conduct, in which they pledge to carefully and thoroughly review materials that are circulated for TF Member approval, and a Conflicts Policy, which requires that TF Members participate based on their best professional judgment and not their organization’s interest, and also identify and disclose financial conflicts of interest or perceived conflicts of interest relating to technical matters discussed at the Technical Forum. See Attachment B: Code of Independence/Code of Conduct.

**M. Technical Subcommittee Members**

In addition to the Technical Forum, the Cal TF will also make use of technical subcommittees that provide review and analysis of issues prior to review by the Technical Forum. In addition to TF members, these subcommittees may include individuals that are not members of the TF.

**Attachments**

Attachment A: Cal TF Application Supplement

Attachment B: Code of Independence/Code of Conduct

Attachment C: 2019 Cal TF Meeting Schedule

**Attachment A:**

**Application Supplement**

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| Applicant Name:  |
| **Recent Technical Publications/Projects (past three years):** *List relevant publications/projects* |
| **Experience in the Energy Efficiency Industry:***Please describe* | Number of Years: |
| **Experience in Developing Energy Use and Demand Savings Estimates:***Please describe* | Number of Years: |
| **Collaborative Experience:***Identify collaborative names and describe role* | Number of Years: |
| **Technical Expertise**[ ]  Engineering[ ]  Statistics[ ]  NMEC[ ]  Data Science[ ]  Evaluation[ ]  Experimental Design[ ]  Codes and Standards[ ]  Energy Modeling[ ]  Behavioral Measure Savings | **Specific Technology Expertise** [ ]  Lighting[ ]  HVAC[ ]  Motors & Drives[ ]  Refrigeration[ ]  Emerging Technology[ ]  Industrial Processes [ ]  Appliances[ ]  Smart Grid Technologies[ ]  Behavioral Measures [ ]  Demand Response  |

Note 1: As set forth in Section G: Submittal Requirements and Process, applicants must also submit a cover letter, resume, and request for compensation (if applicant meets eligibility requirements for travel compensation and applicant’s participation is contingent on receiving travel compensation). Requests for compensation for travel expenses are not automatically approved but are considered on a case-by-case basis.

Note 2: Applicants should include qualifications relating to the following areas: statistics, NMEC and data science, evaluation, measurement and verification (EM&V), with emphasis on study design and review, California and federal codes and standards, and building energy modeling of energy savings estimates, in particular DOE 2.2 and EnergyPlus, estimating impacts from behavioral measures.

**Attachment B:**

**Code of Independence and Code of Conduct**

**Background**

The California Technical Forum (Cal TF) wishes to maintain the highest integrity in all its operations, in part, by requiring California Technical Forum Members (Cal TF Members) to pledge that they will vote on technical matters before the Cal TF using their best independent professional judgment, and not based on their organizational interests. In addition, the Cal TF seeks to conduct its operations in a collaborative, collegial environment where all parties agree to a Code of Conduct that will foster collaboration and collegiality.

**Code of Independence**

This Code of Independence applies to Cal TF Members.

**A. Code of Independence**

All Cal TF Members must pledge to review and comment on all matters before the Cal TF using their best independent professional judgment, and not based on their organizational interests or perspective. If, in a particular circumstance, the person casting a vote does not believe they can vote based on their best independent professional judgment, they may recuse themselves from the particular matter.

**B. Violations of the Code of Independence**

Alleged violations of the Code of Independence shall be brought to the Cal TF Facilitator. The party identifying the alleged Code violation must provide a written description of the circumstances and all relevant facts. The Cal TF Facilitator will investigate the alleged violation confidentially and brief the Policy Advisory Committee (PAC) on any findings confidentially. To the extent the allegation is substantiated, the PAC will determine how to address the violation, up to and including excluding the violator from further participation in the Cal TF Process.

**Code of Conduct**

The Code of Conduct applies to all participants in the Cal TF process, including PAC Members, Cal TF Members, the Cal TF Facilitator and Cal TF staff. In addition, public participants in the Cal TF meetings are expected to conduct themselves consistent with the intent of the Code of Conduct and may be excluded from Cal TF meetings by the Cal TF Facilitator if they do not.

**A.**

**Code of Conduct**

For the Cal TF to be an effective and meaningful stakeholder process, all parties who participate in the Cal TF must agree to cooperate and collaborate, and also to conduct themselves in a professional and courteous manner, as follows:

1. Provide Meaningful Review: Prior to reviewing and commenting on any issue, carefully, thoroughly, and thoughtfully reviewing all material pertaining to the matter at hand.
2. Identify Relevant Data, Studies, Documents, Analysis: Identifying relevant data, studies, documents and analysis relating to the matter under consideration and present them to the Cal TF as appropriate.
3. Raise Opposing Technical Views: Prior to reviewing or commenting on any technical issue, with as much notice as possible, raising reasonable technical issues or opposing views if not adequately captured in the written documents brought before the Cal TF relating to a matter. The purpose of this requirement is to ensure that Cal TF Members are adequately apprised of all relevant technical data and assessments prior to review and comment on a matter.
4. Fairly Consider Alternate Perspectives; Compromise to Reach Technically Sound Outcomes: Cal TF Members shall fairly consider alternate perspectives reaching consensus outcomes that are technically sound and rigorous.
5. Behave Professionally and Courteously: All participants in the Cal TF process agree to treat all other participants with courtesy and respect regardless of their organizational affiliation or position, age, background or other characteristics, and refrain from inappropriate language, ad hominem remarks, and other inappropriate behavior.
6. Not Retaliate: Cal TF participants must agree, in good faith, to not retaliate against any other Cal TF participants for data, positions, arguments or other constructive contributions they make to the Cal TF process either in the Cal TF process or in other fora.
7. Engage in Open and Honest Communication: Cal TF participants agree to engage in open and honest communication, and not to deceive others or misrepresent their true opinions or positions.

**B. Violations of the Code of Conduct**

Alleged violations of the Code of Conduct shall be brought to the Cal TF Facilitator. The party identifying the alleged Code violation must provide a written description of the circumstances and all relevant facts. For the first and second violations, the Cal TF Facilitator shall discuss the alleged violations with the violator and may brief the PAC of the alleged violation. For third and subsequent violations, the Cal TF Facilitator, in consultation with the PAC, will investigate the alleged violation confidentially, and brief the PAC on any findings confidentially. The PAC will determine how to address the violation, up to and including asking the violator to not participate further in the Cal TF process.

**Attachment C:**

**2019 Cal TF Meeting Schedule**

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| **Date** | **Location** |
| January 24, 2019 | Pacific Energy Center851 Howard Street, San Francisco, CA |
| February 28, 2019 | La Kretz Innovation Center525 South Hewitt Street, Los Angeles |
| March 28, 2019 | La Kretz Innovation Center525 South Hewitt Street, Los Angeles |
| April 25, 2019 | Pacific Energy Center851 Howard Street, San Francisco, CA |
| *May 2019 – No meeting* | *No meeting* |
| *June 2019 – No meeting* | *No meeting* |
| July 25, 2019 | La Kretz Innovation Center525 South Hewitt Street, Los Angeles |
| *August 2019 – No meeting* | *No meeting* |
| September 26, 2019 | Pacific Energy Center851 Howard Street, San Francisco, CA |
| October 24, 2017 | Pacific Energy Center851 Howard Street, San Francisco, CA |
| November 21, 2019 | La Kretz Innovation Center525 South Hewitt Street, Los Angeles |
| December 19, 2019 | Pacific Energy Center851 Howard Street, San Francisco, CA |

1. The Cal TF will hold a Modeling Charrette on May 30th in lieu of the May TF meeting. [↑](#footnote-ref-1)
2. Cal TF PAC members include representatives from the four California Investor-Owned Utilities (IOUs), the Publicly-Owned Utilities (POUs), a Regional Energy Networks (REN), a state agency (the California Energy Commission (CEC)), the California Independent System Operator (CAISO) and other stakeholders (including program implementers, a ratepayer and an environmental advocate). The list of current PAC members can be found on the Cal TF website: [www.CalTF.org](http://www.CalTF.org). [↑](#footnote-ref-2)