

Cal TF Custom Initiative



Cal TF launched the Custom Initiative to increase savings from custom projects. Traditionally a cornerstone of the EE portfolio, Custom savings have plummeted.¹ Extensive stakeholder feedback and Cal TF Staff analysis identified critical challenges inhibiting custom program success, including:

- ✓ Unclear, out-of-date, dispersed, unavailable, and inconsistent requirements and guidance
- ✓ Extensive, time-consuming, and duplicative documentation requirements
- ✓ Lengthy, costly, and uncertain project review timelines
- ✓ Multiple and inconsistent influence and attribution assessments (even for a single project)

The Cal TF Custom Initiative addresses these challenges to achieve the following benefits:



Increase net savings through increased customer participation and broader range of custom measures.



Accelerate EE project installation with pre-approved tools and reducing friction in program processes.



Consolidate redundant work streams and reduce admin costs to **improve program cost-efficiency**.



Enable small and new market actors with statewide tools and clear, streamlined rules and processes.



Increase statewide consistency and transparency in savings estimation and verification approaches.

The Cal TF Custom Initiative includes six solutions:

Custom Rulebook. All rules and processes governing custom measures in a single, clear, accessible, organized, up-to-date document that is easy to understand, navigate, and maintain.

Baseline Database. Complete, organized, up-to-date, and accessible repository of baseline data that custom stakeholders can use to develop and review custom measures.

Custom Project Documentation Templates. Streamlined, statewide templates for project development and review will clarify data and documentation requirements, support complete and organized project submittals, and streamline quality control and review.

Customer Influence Templates. Simplified, statewide influence templates will provide clear, consistent, balanced methods to assess free ridership. Furthermore, Cal TF Staff will recommend that free ridership is assessed only once for each project.

Custom Measure Packages. TF-affirmed, measure-specific guidance on eligibility, technical methods, data requirements, and tools to support accurate and consistent measure development and review for common custom measures.

Custom Tool Library. Accessible library of TF-affirmed calculation tools to support accurate and consistent measure and project development and to support streamlined quality control.

Additional Information and Next Steps

Custom Initiative activities are conducted through the Custom Subcommittee and Custom Measure Working Groups, with draft work products brought to the Technical Forum for review and affirmation.

Cal TF Staff will work closely with CPUC Staff, providing regular updates, seeking input, reviewing proposed solutions, and encouraging engagement; then seeking Staff review and approval of all Cal TF work product so that PAs, Implementers, and customers can use the new resources with confidence.

More information: <https://www.caltf.org/custom-subcommittee>

¹ For all four IOU-PAs, custom project activity has dropped more than 80% compared to 2018.