



Subcommittee Summary: DEER Alternatives

Subcommittee	Subcommittee Name Here	
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Subcommittee Members: Cal TF Members	Name	Organization, email
Subcommittee Members: non-TF Members	Name	Organization, email
Final Deliverable(s)	"DEER Alternatives" Memo and Presentation	
Commencement Date	June 2015	
Conclusion Date	November 2015	

I. Subcommittee Objective

The purpose of the subcommittee is to produce a White Paper and accompanying PowerPoint Presentation for the Cal TF Policy Advisory Committee November meeting that characterizes the current state of ex ante value development in California, as embodied in DEER and non-DEER workpapers, and compares it to ex ante value development practices in other jurisdictions. The white paper will consider whether DEER and non-DEER workpapers should be "fixed" and continue to be used, or replaced by an alternative. In the case the subcommittee recommends an alternative, the work will make concrete recommendations about the best alternative available.

II. Description of Issues

The following information should be addressed by the subcommittee:

1. DEER Objectives –
 - What is purpose of DEER?
 - Who uses DEER?
 - What is DEER used for?
2. Summary of Commission Guidance on DEER and Ex Ante Value Development
 - Summary of and reference to A. Mejia memos
3. History of DEER



- Summary of and reference to A. Mejia memos
- 4. Current State of Ex Ante Value Development in California
 - Explanation of DEER and non-DEER workpapers
 - DEER
 - i. What information/measures are in DEER?
 - ii. Structure and usability of DEER
 - iii. Process for developing/updating values in DEER
 - iv. Other observations—flow chart and narrative of structure, percentages of savings, accuracy vs. precision, barrier to entry for new implementers/administrators
 - Non-DEER WP
 - i. What information/measures are contained in non-DEER WP?
 - ii. Structure/location of non-DEER WP
 - iii. Process for developing/updating values in DEER
 - iv. Other observations
 - DEER, non-DEER WP and Reporting
- 5. Ex Ante Value Development in Other States
 - What information/measures contained in TRMs in other states?
 - TRM Structure
 - Process for developing/updating values in other TRMs
- 6. Can DEER/non-DEER WP be “fixed”?
- 7. Options
 - Option 1: Fix DEER and non-DEER WP
 - Option 2: Develop non-DEER statewide electronic TRM
 - Pros/Cons and Business Case for Each Option. Include time/money currently spent on DEER.
 - Create updating plan for each option
- 8. “Thinking Outside the Box”
 - What would optimal approach be to forecasting and measuring EE savings if DEER and DOE 2.2, EQUEST and EnergyPlus did not exist?
- 9. Conclusion and Recommendation
 - Implementation recommendations

III. **Background information**

See presentations given to TF and PAC:

Annette Beitel, *Ex Ante Value Development: Current Practice and Future Vision* (April 9, 2015 - PAC Presentation)(April 23, 2015 - TF Presentation). Both are posted on the Cal TF website: www.CalTF.org.



IV. Schedule

Date	Agenda	Next Steps
June 2015 (Meeting #1)	<ul style="list-style-type: none"> • Overview of abstract • Agreement on Objectives • Agreement on Issues • Agreement on number of meeting to hold • Discussion 	Update Subcommittee Plan
June 2015 (Meeting #2)	Presentation on: <ol style="list-style-type: none"> 1. DEER Objectives – <ol style="list-style-type: none"> a. What is purpose of DEER? b. Who uses DEER? c. What is DEER used for? (incl. reporting) 2. Summary of Commission Guidance on DEER and Ex Ante Value Development <ol style="list-style-type: none"> a. Summary of and reference to A. Mejia memos 3. History of DEER <ol style="list-style-type: none"> a. Summary of and reference to A. Mejia memos 	TF Feedback <ul style="list-style-type: none"> • Should CA change DEER/non-DEER WP objectives and/or uses? • Should CA have two separate “systems” for ex ante value development (DEER and non-DEER WP)
July 2015 (Meeting #1)	<ul style="list-style-type: none"> • Presentation of observations and findings from other jurisdictions <ul style="list-style-type: none"> ○ What information/measures contained in TRMs in other states? ○ TRM Structure ○ Process for developing/updating values in other TRMs 	Subcommittee Feedback <ul style="list-style-type: none"> • Any other information Cal TF staff did not capture? • Comments on other state practices.



July 2015 (Meeting #2)	<ul style="list-style-type: none"> Memo and presentation on Ex Ante Value Development Best Practices 	Subcommittee Feedback <ul style="list-style-type: none"> Modifications/additions to "Best Practices" identified
September 2015 (Meeting #1)	<ul style="list-style-type: none"> Presentation: Can DEER be fixed? Alternative approaches/form/processes for ex ante value development Business case for sticking with DEER vs. Developing Alternatives 	Subcommittee Feedback <ul style="list-style-type: none"> Should DEER be fixed or should an alternative be developed? If alternative developed, key attributes?
September 2015 (Meeting #2)	<ul style="list-style-type: none"> Presentation: Non-DEER alternatives <ul style="list-style-type: none"> Structure Form (hard copy/electronic) Update Process Acceptable methods for developing ex ante values (from Ex Ante Value Development subcommittee) 	Subcommittee Feedback <ul style="list-style-type: none"> Should DEER be fixed or should an alternative be developed? If alternative developed, key attributes?
October 2015 (Meeting #1)	<ul style="list-style-type: none"> Presentation "Thinking Outside the Box" (George Hernandez) 	Subcommittee Feedback <ul style="list-style-type: none"> Statewide TRM or break open paradigm
October 2015 (Meeting #2)	Review First Draft White paper and Presentation	Subcommittee Feedback on White Paper/Presentation
November (Meeting #1)	Review final White Paper and presentation for TF <ul style="list-style-type: none"> 11/19/15 (TF Meeting) 	Subcommittee Feedback on White Paper/Presentation Incorporate TF Feedback on same
November (Meeting #2)	Review final White Paper and presentation to PAC <ul style="list-style-type: none"> 12/10/15 (PAC Meeting) 	Subcommittee Feedback on White Paper/Presentation



V. Attachments

Annette Beitel, *Ex Ante Value Development: Current Practice and Future Vision* (April 9, 2015 - PAC Presentation)(April 23, 2015 - TF Presentation).