

Existing Measures Communication Plan



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Agenda Today

- Overview of eTRM capabilities – tied to job functions
 - VERY high level
- Insight into what we could do
- *Survey*
 - Goals to gain understanding of
 - ✦ New/additional ways that the data could be used
 - ✦ What current challenges you might be facing
 - ✦ How you would want to receive data
 - What data, How/When to Receive, How to Comment

How Do You Use the eTRM Today?

How Can You Use the eTRM Tomorrow?

3

- **Program Manager**

- Planning

- ✦ Measure Reports
- ✦ Permutation Reports
- ✦ eTRM Stats-Claims
- ✦ PA Implementation Codes

- Understanding/Learning

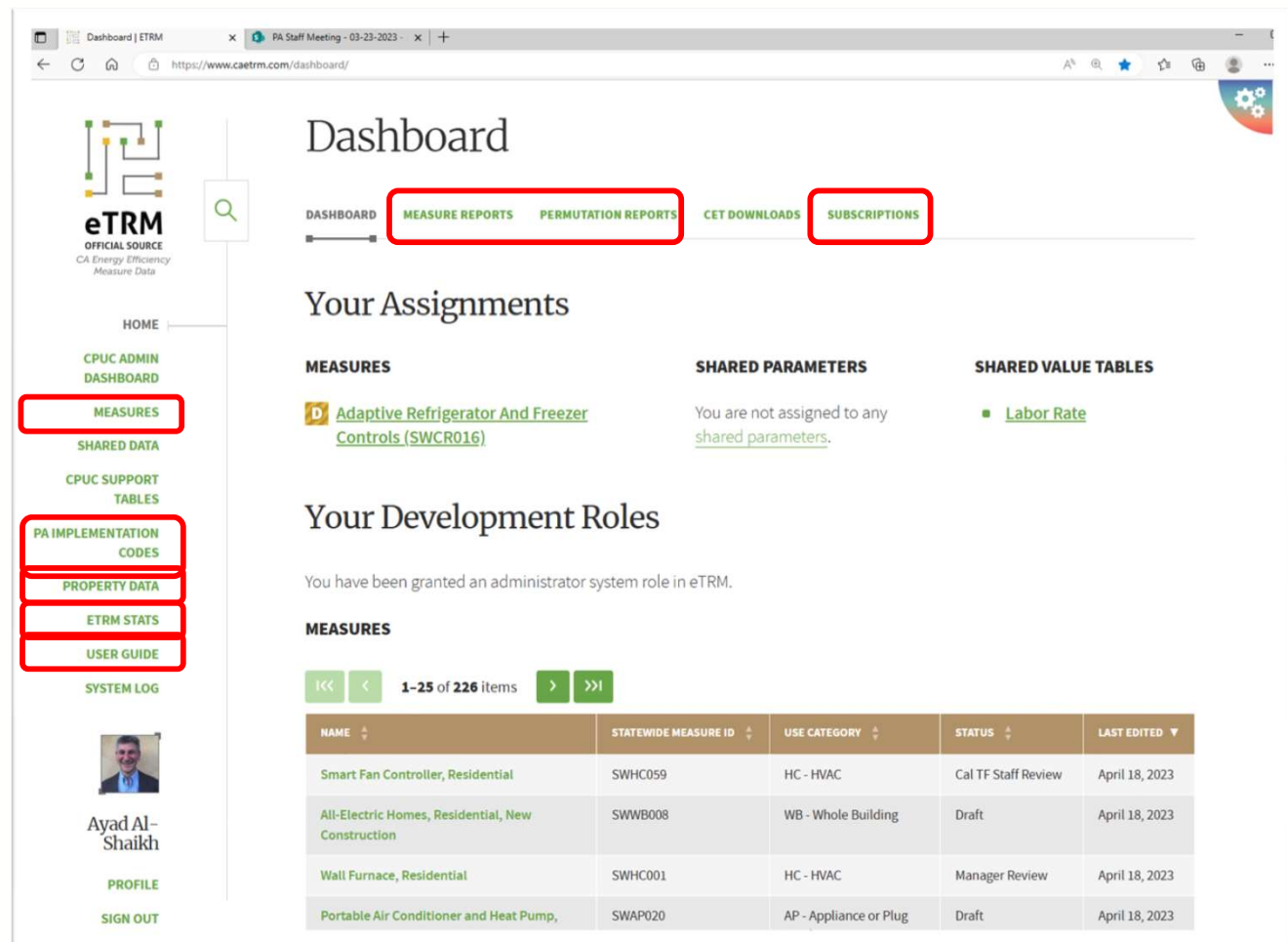
- ✦ Training
- ✦ Measures
- ✦ *Property Data*

- Keeping Informed

- ✦ Subscriptions
- ✦ eTRM Stats-Sunseting
- ✦ *Dashboard*

- Measure Developer

- Implementer



Dashboard

MEASURE REPORTS PERMUTATION REPORTS CET DOWNLOADS SUBSCRIPTIONS

Your Assignments

MEASURES SHARED PARAMETERS SHARED VALUE TABLES

Adaptive Refrigerator And Freezer Controls (SWCR016)

You are not assigned to any shared parameters.

Labor Rate

Your Development Roles

You have been granted an administrator system role in eTRM.

MEASURES

1-25 of 226 items

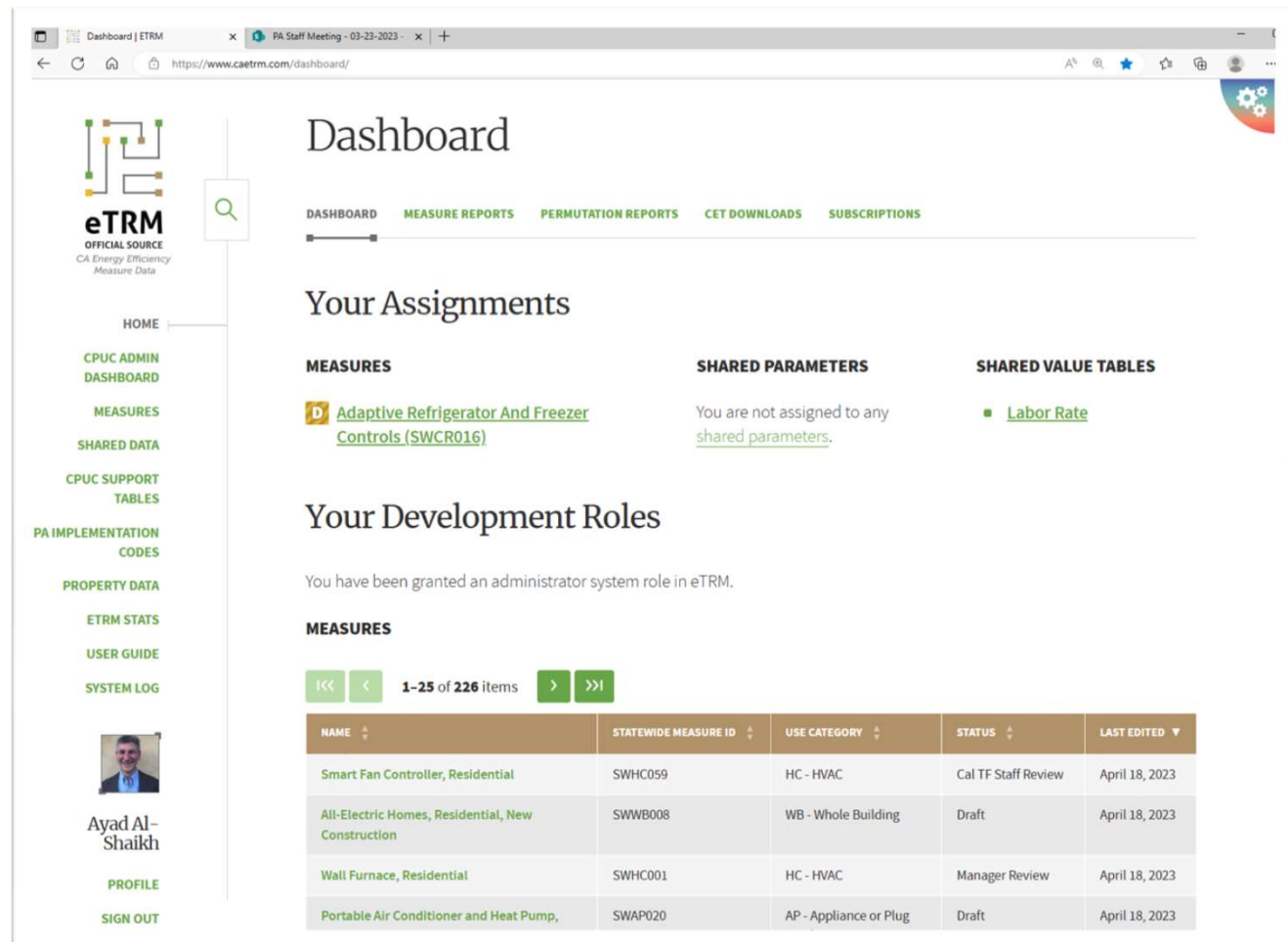
NAME	STATEWIDE MEASURE ID	USE CATEGORY	STATUS	LAST EDITED
Smart Fan Controller, Residential	SWHC059	HC - HVAC	Cal TF Staff Review	April 18, 2023
All-Electric Homes, Residential, New Construction	SWWB008	WB - Whole Building	Draft	April 18, 2023
Wall Furnace, Residential	SWHC001	HC - HVAC	Manager Review	April 18, 2023
Portable Air Conditioner and Heat Pump,	SWAP020	AP - Appliance or Plug	Draft	April 18, 2023

How Do You Use the eTRM Today?

How Can You Use the eTRM Tomorrow?

4

- Program Manager
- Measure Developer
- **Implementer**
 - Planning
 - ✦ Measure Reports
 - ✦ Permutation Reports
 - ✦ eTRM Stats-Claims
 - ✦ PA Implementation Codes
 - Understanding/Learning
 - ✦ Training
 - ✦ Measures
 - ✦ *Property Data*
 - Keeping Informed
 - ✦ *Subscriptions*
 - ✦ eTRM Stats-Sunseting
 - ✦ eTRM Stats-Measure Comparisons
 - ✦ *Dashboard*



The screenshot shows the eTRM Dashboard interface. The left sidebar contains navigation links: HOME, CPUC ADMIN DASHBOARD, MEASURES, SHARED DATA, CPUC SUPPORT TABLES, PA IMPLEMENTATION CODES, PROPERTY DATA, ETRM STATS, USER GUIDE, SYSTEM LOG, and a user profile for Ayad Al-Shaikh with a SIGN OUT button. The main content area is titled 'Dashboard' and includes navigation tabs for DASHBOARD, MEASURE REPORTS, PERMUTATION REPORTS, CET DOWNLOADS, and SUBSCRIPTIONS. Under 'Your Assignments', there are sections for MEASURES (listing 'Adaptive Refrigerator And Freezer Controls (SWCR016)'), SHARED PARAMETERS (stating 'You are not assigned to any shared parameters.'), and SHARED VALUE TABLES (listing 'Labor Rate'). Below this is a section for 'Your Development Roles' stating 'You have been granted an administrator system role in eTRM.' At the bottom, a table displays a list of measures with columns for NAME, STATEWIDE MEASURE ID, USE CATEGORY, STATUS, and LAST EDITED.

NAME	STATEWIDE MEASURE ID	USE CATEGORY	STATUS	LAST EDITED
Smart Fan Controller, Residential	SWHC059	HC - HVAC	Cal TF Staff Review	April 18, 2023
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Dashboard

MEASURES

Your Assignments

MEASURES

You do not have assignment of any [measures](#).

Your Development Roles

You have not been granted a development role in any measure. However, you are welcome to view all published measures in the [Measure Catalog](#).

[BROWSE THE MEASURE CATALOG](#)

★ SWAP001-01 has an End Date added of 12/31/2023.
SWHC005-03 was just published on 6/1/2023.

★ SWWH003-04 was updated to include new Delivery Types.
PG&E just added PA Codes for SWLG009-03.

What types of data are important your job?

[Subscribe](#)

Ayad Al-Shaikh

PROFILE

SIGN OUT

ABOUT CONTACT PRIVACY POLICY TERMS OF USE

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Measure Developer Links and Action Items

List of Measure
Announcements that
are *prioritize* by you.

Ability to subscribe to measure
groups:

- Use category, sector, fuel sub, “new” measures, etc.
- What other categories?

Goals of the Meeting to Understand

- New/additional ways that the data could be used
 - Connection between measures and claims (visual?)
 - Connection between claims and potential
- What current challenges you might be facing
 - How to track and prioritize changes
 - Visibility into differences between versions
- How you would want to receive data
 - Can/should we avoid email overload

Starting the Survey

7

- Time to open the survey!
 - ✦ <https://www.surveymonkey.com/r/C8W7GV3>
 - (click the link or paste into browser)

- See the *link* in the chat
 - In checkboxes, it is OK to select more than one if they apply
 - Note that for ratings: 1 – Least important / 5 – Most important

Stakeholder Communication Plan

Audience

Engagement

What Data

How/When Receive

How Comment

- Which groups need to be informed:
 - IOUs / POUUs
 - CCAs / RENs
 - Implementers / CEDMC
 - CPUC / Evaluators
 - Who else?
- Is it better to focus data by job function:
 - Program manager
 - Engineer
 - Customer
 - Other categories?

Stakeholder Communication Plan

Audience

Engagement

What Data

How/When Receive

How Comment

- What is the best way to engage with each group to understand stakeholder needs and preferences:
 - Focus group meetings
 - Survey
 - Regular group meetings
 - Other?

Stakeholder Communication Plan

Audience

Engagement

What Data

How/When Receive

How Comment

- What data is more important for you to track?
 - Measure related:
 - ✦ New measures
 - ✦ Sunsetting measures
 - ✦ Changes to existing measures
 - ✦ Changes to groups of measures
 - ✦ Policy related issues
 - Measure inputs (Shared Objects / DEER changes)
 - Other data?

Stakeholder Communication Plan

Audience

Engagement

What Data

How/When Receive

How Comment

- What data is more important for you to track?
 - Measure related:
 - ✦ New measures
 - ✦ Sunsetting measures
 - ✦ Changes to existing measures
 - Same major version
 - Administrative change only (typo, formatting)
 - Permutation number change (added delivery types, BT, vintages)
 - Data corrections
 - New major version
 - New Offerings
 - Impact changes (savings, cost, NTG, etc)
 - ✦ Changes to groups of measures; Alerts users to:
 - New measures
 - Common focus areas
 - Your custom subscriptions
 - ✦ Policy related issues

Stakeholder Communication Plan

Audience

Engagement

What Data

How/When Receive

How Comment

- How/when do you want to receive information?
 - Self-serve
 - ✦ Live reports
 - ✦ Dashboard on eTRM
 - ✦ Cal TF website
 - Delivered to you
 - ✦ Email (one or groups of issues)
 - ✦ Monthly / Weekly / Daily report
 - Other ways?

Stakeholder Communication Plan

Audience

Engagement

What Data

How/When Receive

How Comment

- How would you want to provide feedback for common requests:
 - Recommend changes to current measure package version
 - Recommend changes to future measure package version
 - Comment on Validation Data lists
 - General questions

Next Steps

Thank you!

- Next Steps
 - The survey will be available through the Cal TF Website if you want to share this with other members of your internal team.
 - Survey:
 - ✦ <https://www.surveymonkey.com/r/C8W7GV3>
- We are reaching out to:
 - Program Administrators
 - ✦ IOUs, POU, CCAs, RENs
 - Implementers
 - Measure Developers
 - CPUC and Consultants
 - Evaluators
- Integrate feedback into future eTRM Enhancements