



CALIFORNIA

TECHNICAL FORUM

First Year Report August 2015

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.

“Tremendous Progress Has Been Made”¹

The California Technical Forum (Cal TF) officially launched on June 26th of 2014. The Technical Forum (TF) completed its first year, achieved its 2014 Business Plan objectives, and assumed a significantly expanded work mandate for 2015. Key accomplishments in the first year include robust participation in the TF and Policy Advisory Committee (PAC), development of tools, written guidelines and templates to ensure clear and consistent administration of the Cal TF, and the Cal TF website launch for transparency and information dissemination. Through the first year of operation, Cal TF has developed a firm foundation to achieve its mission of:

Supporting 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.

Launching Cal TF

Launching the Cal TF involved recruiting and engaging participants for two key arms of the Cal TF, the Policy Advisory Committee (PAC) and the Technical Forum (TF).² The PAC, a steering committee that guides and monitors Cal TF’s work, includes representatives from all key stakeholders who participate in California’s energy efficiency portfolio, including: the investor-owned utilities and publically-owned utilities, regulators (the California Energy Commission),³ rate payer and environmental advocates, the independent system operator, regional energy networks, implementer trade organizations, and a non-profit program administrator.⁴ The Technical Forum, an independent body of technical experts (twenty-nine in the first year), includes experts from industry, utilities, academia, and non-profits.⁵

¹ TF Member response to End of Year Survey

² See California Technical Forum Operations Manual for TF and PAC member roles and responsibilities: www.caltf.org/tools/.

³ CPUC staff was invited to participate on the PAC, but was advised by own legal council that regulatory staff participation could pose a conflict of interest.

⁴ Inaugural Cal TF PAC members: Anthony Andreoni (California Municipal Utilities Association), Sylvia Bender and Martha Brook (California Energy Commission), Jan Berman (Pacific Gas & Electric), Michael Campbell (CPUC Office of Ratepayer Advocates), Jonathan Changus (Northern California Power Agency), Howard Choy (City and County of Los Angeles), Bryan Cope (Southern California Public Power Authority), Lisa Davidson (San Diego Gas & Electric), Bob Emmert and John Goodin (California Independent System Operator), Steve Galanter (Southern California Edison), Margie Gardner (California Energy Efficiency Industry Council), Don Gilligan (National Association of Energy Services Companies), Rachel Huang (Sacramento Municipal Utility District), David Jacot (Los Angeles Department of Water and Power), Beckie Menten (MCE), Peter Miller (Natural Resources Defense Council), Mary Ann Piette (Lawrence Berkeley National Lab), and Dan Rendler (Southern California Gas Company).

⁵ Inaugural Cal TF members: Andrew Brooks, Tom Eckhart, Scott Fable, Ahmad Ganji, Yeshpal Gupta, Bruce Harley, George Hernandez, Sherry Hu, Ron Ishii, Srinivas Katipamula, Larry Kotewa, Pierre Landry, Spencer Lipp, Steven Long, Doug Mahone, Mary Matteson Bryan, John McHugh, John Proctor, David Pruitt, George Rogers, Christopher Rogers, Armen Saiyan, David

TF members individually have impressive credentials; collectively, they have over 400 years of combined energy efficiency experience and a broad portfolio of advanced degrees. They are energy efficiency professionals—including engineers, economists, and social scientists—with experience across all customer classes, and expertise in a wide range of efficiency measures, from lighting and HVAC to innovative behavioral services and other emerging approaches. The members are experts in sophisticated simulation modeling, experimental design, economics, statistics, program implementation, and evaluation. The expertise amassed in the TF is invaluable in providing insightful and thorough review of current data analytical tools. Although the TF members are volunteers, they have been active, engaged participants, and regularly attend full day-long meetings. While the initial TF member commitment was only one year, all but two inaugural members chose to serve for a second year, a testament to the value and potential the TF members see in the organization.

Cal TF's work, schedule, and activities are coordinated by Cal TF staff. Cal TF staff's role includes:

- Developing the annual business plans for affirmation by the PAC, then tracking and ensuring completion of business plan items;
- Meeting facilitation, including developing meeting agendas, working with presenters to ensure clear and high-quality presentations and materials, and note-taking;
- Leading subcommittee work, including facilitating and developing material for subcommittees;
- Maintaining active communications with all interested stakeholders, including development and maintenance of the Cal TF website;
- Performing best practices research on key issues that the Cal TF is addressing;
- Developing tools, templates, and guidelines to standardize and clarify Cal TF work, including developing and maintaining a Cal TF Operations Manual for clear, efficient, and transparent organizational management; and
- Assisting with statewide measure coordination, which includes developing a statewide measure list, publishing it on the Cal TF website, and updating the measure list monthly.

Core First Year Cal TF Work: Foundational Research

To ensure compliance with Commission (both CPUC and CEC) policy and guidelines for ex ante measure review, Cal TF staff researched and summarized California regulatory guidance on ex ante value development, including the history of and regulatory directives on DEER,⁶ DEER guidelines, and DEER methods. Cal TF staff also

Springer, Dylan Sullivan, Brandon Tinianov, Bing Tso, Pierre van der Merwe, Martin Vu, and Bryan Warren. TF members do not represent the views or interests of their employers; bibliographies for each member, including current and past organizations, can be found at www.caltf.org/tf-members/.

⁶ DEER is an acronym for "Database for Energy Efficiency Resources."

researched state policy objectives on energy efficiency to align Cal TF's work with broader state policy objectives. In addition, Cal TF staff researched nearly twenty-five past and current energy efficiency stakeholder collaboratives that have operated throughout the U.S. to identify best practices on stakeholder collaborative formation, operation, and goals achievement. These findings were leveraged to ensure that the formation and operation of Cal TF reflected nationwide best practices. All foundational research is posted on the Cal TF website.

Core First Year Cal TF Work: New Measure Review

By the end of 2014, the TF had reviewed and approved five new measures, thus meeting the key goal established in the first year Business Plan. The TF also approved several other measure abstracts for full workpaper development, including one by a non-Program Administrator (PA) entity (NRDC).⁷ To facilitate workpaper development, Cal TF staff developed a statewide workpaper template and initial guidelines for workpaper development. Cal TF staff also created a complete list of workpapers in California by identifying and consolidating into a single list workpapers from individual utilities and the Publicly Owned Utility Technical Reference Manual (POU TRM). The master list of California workpapers is posted on the Cal TF website and updated on a monthly basis to include measures that are in development.

Relationship with Regulators and Other Stakeholders

The activities outlined in the sections above and below describe how the organization met the goals set by its 2014 Business Plan. However, a less concrete but equally essential element to the success of the organization is building and maintaining awareness, support, and trust in Cal TF by regulators and other stakeholders.

From the beginning, Cal TF staff positioned the organization as a tool and resource for all entities involved in energy efficiency that need to collaborate on technical issues, with an initial focus on new measure review. The shared value of this collaboration can be seen in both formal and informal communications: About 50% of comments filed in response to Workshop I of the CPUC's Rolling Portfolio Phase II rulemaking contained one or more recommendations to shift the burden of developing technical estimates to the Cal TF or a similarly independent model.

Cal TF staff believes it is very important to regularly communicate with and seek input from California regulators so that Cal TF work is valued by and helpful to them. Thus, Cal TF staff meets quarterly with CEC staff to keep them apprised of Cal TF activities and solicit their input and guidance. Similarly, Cal TF staff meets with CPUC staff regularly to inform them of and seek feedback on Cal TF work, Cal TF staff observations, and recommended process improvements. The regular Cal TF staff-regulator meetings have reinforced the message that Cal TF's work is intended to

⁷ Prior to Cal TF, workpapers could only be developed by utilities or utility-managed contractors. The Cal TF allows third parties to develop and submit workpapers.

supplement and aid the work of the regulators, and never to supplant regulatory authority and decision-making.

Expanding Cal TF's Work: 2015 Business Plan

Cal TF's 2014 work was limited to organizational design, launch, and new measure review; a limited scope for the organization's "proof of concept phase." Due to Cal TF's success in 2014, the 2015 Business Plan contains a substantially more ambitious work scope. The expanded 2015 work scope includes subcommittee formation and work to perform more technical analysis that can be accomplished through the full TF given that the full TF only meets ten times per year.

Cal TF: Future Vision

Cal TF has demonstrated its ability to define and accomplish the measurable tasks set forth in its Business Plan. It has achieved trust and credibility with energy efficiency stakeholders, as evidenced by the number of stakeholders who have formally identified Cal TF as an independent body that should address a myriad of technical issues. Regulators have signaled that they see Cal TF as a trusted and independent entity that can advise and assist them in addressing complex technical issues.

However, the long-term viability of Cal TF will rest on its ability to significantly reduce the time, cost, and contention associated with working through technical issues in California. Cal TF staff believes that Cal TF's potential will only be realized if stakeholders and regulators make significant and meaningful changes to existing tools and processes. Cal TF's proposal for an alternative structure and process for developing and reviewing ex ante estimates will be presented to the PAC by the end of 2015 for the PAC's review and hopefully affirmation.

TF Member Responses to End of Year Survey

Cal TF sought anonymous feedback from TF members after the first year of TF operations. Over half (18) of TF members responded to the five questions asked through an email (Survey Monkey) survey, which were:

1. What do you think has worked well so far?
2. What have you found personally valuable about participating in the Technical Forum?
3. Do you have any suggestions for future improvements?
4. What issues do you think the TF should work on in the coming term? Please be specific.
5. Do you have any other comments?

All TF member responses are provided below.

Question 1:

| What do you think has worked well so far? | |
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| <i>TF Member Response</i> | <i>Cal TF Staff Response, if needed</i> |
| I've been pleased at how staff has fostered a strong sense of collegiality and shared mission among the TF. Given all of the moving parts, uncertainties, and conflicting agendas, it is remarkable what the TF has managed to accomplish to date. I've also appreciated the thorough, accurate minutes and the general transparency throughout. You all on staff are first-rate! | |
| Open communication and application of the experience of members in various aspects of EE in the state as well as the WPs | |
| The TF member expertise and subsequent discussions have been first rate. The support staff is well prepared and facilitation of the meetings is really excellent. It is apparent that all really care about EE savings and are not afraid to ask and discuss the hard questions. | |
| The experience and breadth of the membership; the openness of the staff and leaders of TF to both problems and ideas | |
| I think it has worked well for the most part. The structure for each meeting has helps to keep everyone on point and not diverge. | |
| Learning about new technologies and methodologies. | |
| The overall process seems ok--it's a bit hard for me | |

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| to say since I'm not steeped in the CA environment. The meetings work generally well for remote attendees--not the very best I've experienced but better than most. | |
| The meeting format and the agendas have been very good. The NRDC location is philosophically nice, but the PEC is a better meeting location. We should try to meet there as often as possible. Annette's facilitation has been informed and even-handed. And the presenters have been almost always well prepared. Definitely NOT a waste of my time. | |
| The ability to have candid input from industry on the various topics. | |
| For a startup, I think tremendous progress has been made in evolving the management and structure of the TF. Meetings are extremely well managed by staff, with excellent facilitation of discussions. Meeting materials are always provided well in advance of meeting dates. I think the consensus decision-making process has been successful. | |
| I see two prime successes: First, the TF has created an atmosphere where the members are truly engaged in the process, the credibility of the research, and the findings. The members are working together and/or challenging each other in a very healthy manner. Building that level of involvement so quickly is difficult. Second, I think that the Forum has done an excellent job of establishing an initial scope and protocol (very well done) but also allowing the scope of the forum to expand beyond its explicit mandate as determined by the staff or members. This will lead to the most relevant work long term. | |
| Thoughtful work by experts in the field. | |
| The diverse group of experts are well positioned to offer input and suggestions, and the fact that they actually read IOU workpaper drafts is evident and appreciated. | |
| It's hard to say. I'm not sure what has been achieved other than providing reviews on white paper assumptions. | <i>The Cal TF's initial scope was limited by design to launching the organization and reviewing workpapers to prove the organizational concept. Cal TF is tackling</i> |

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| | <i>broader technical questions in 2015.</i> |
| The consensus decision making, template for work papers, and contributions from all stakeholders to improve the work paper approval process. | |
| I like the length of the meeting time! Not too long and not too short! | |
| Regular TF meetings and varied agenda, CALTF staff support efforts, standardization of approaches to present measures, creating subcommittees, web site. | |
| The subcommittee meetings, agenda's at full Cal TF meetings are pretty full and meaningful. | |

Question 2:

| What have you found personally valuable about participating in the Technical Forum? | |
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| <i>TF Member Response</i> | <i>Cal TF Staff Response, if needed</i> |
| I've enjoyed the opportunity to rub shoulders with some of the best and brightest in the industry, and to better understand the tremendous opportunities (at times wasted, unfortunately) in California. For a small firm located out of state, getting a sense of where the major players in CA are going is invaluable. It helps me be more knowledgeable and effective in my own corner of the country. | |
| Interaction with knowledgeable members. | |
| The level of expertise and integrity is unsurpassed. I feel that the California electric and gas ratepayers are well served by the CalTF organization. | |
| Hearing other professional ideas; networking with other professionals; having a forum to address current EE limitations in California. | |
| The collaboration with other TF members as well as industry experts that attend the meetings. | |
| Learning about other points of view. | |
| Widening my perspective on non-residential measures, and being able to contribute feels valuable and satisfying. | |
| I enjoy hearing from the wide range of experiences of the Cal TF members, and the informed, intelligent discussions. Often we are in agreement, so the debates are mild, but it's reassuring that folks from different circumstances can reach | |

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| consensus so often. | |
| Networking with other industry stakeholders who have different backgrounds and experiences to help supplement. | |
| Interactions with other leading energy efficiency professionals. Making a positive impact on energy efficiency programs and processes in California. | |
| First and foremost, I value the chance to learn from the vast and varied experience in the room. Many of the members have skills that extend well beyond my expertise. Second, I've found it helpful to better understand the process by which utilities surface and value certain measures prior to formal evaluation. I think that the forum has created a forum and dialogue to improve that process and to bring better technology to bear in the long run. Last, the TF has also been a valuable source of insights into existing databases and their strengths and weaknesses. | |
| The balanced perspectives we jointly develop. | |
| Meeting other industry experts and learning from their perspectives, ie. our recent discussions on control and treatment groups as related to random control trials seems very relevant at this time. | |
| Until the most recent meetings, not much. | |
| In-person meeting. | |
| Many of the topics that were considered in the first year, were not in my area of expertise; therefore, it was a good learning experience for most part. | |
| The group provides a professional and collegial atmosphere to work through technical issues. Expert input has been very useful. | |
| A better view into what is going on in CA EE market. | |

Question 3:

| Do you have any suggestions for future improvements? | |
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| <i>TF Member Response</i> | <i>Cal TF Staff Response, if needed</i> |
| Participating by phone continues to be challenging, both with hearing the speakers and gauging the flow of the conversation. I think making sure that there is a webcam broadcasting the scene in the main room can help alleviate the latter somewhat. Otherwise, I'm not sure what else can be done. | <i>We have booked the PEC for the rest of this calendar year, which should help with the AV quality. We will also explore the idea of streaming live video of the</i> |

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| Trust me, though, participating by phone is still way better than not participating at all. | <i>meeting as well as the webinar.</i> |
| <ul style="list-style-type: none"> - The utilities and others bring more complete WPs to the TF - Utilities do their due diligence on the work that they present to the TF so that less time is taken to refine, critique and complete their work. - Before any vote is taken on the final product, two or three members should review the work for completeness and detail, then the TF as a whole vote on it. Otherwise the documents may have issues that may cause the whole work to come question. If this is repeated, the credibility of TF may be questioned. | <p><i>To address varying workpaper quality, Cal TF staff has:</i></p> <ol style="list-style-type: none"> <i>1. Developed guidelines for quality workpapers (work on this is ongoing in subcommittee and final product will be presented to the full TF by year's end).</i> <i>2. Based on our experience with some early workpapers that were not as thorough or complete as we would have hoped, Cal TF staff is doing more up-front work with measure developers before they present to the Cal TF.</i> <i>3. However, Cal TF staff believes that ultimately it is the workpaper developer's management (generally the utilities) who must perform QA/QC and train developers on what is a high-quality workpaper effort. We believe the upcoming Cal TF Workpaper Development guidelines should help significantly in the effort to ensure high-quality workpapers.</i> |
| <ol style="list-style-type: none"> 1. Establish a protocol for handling comments and presentations from non-TF members. 2. Convince the CEC [CPUC] Staff to participate on the CalTF either as a standing member or a non-voting member. | <i>We have developed a form for comments from the general public and are preparing to implement this new procedure. We are working with CPUC staff to encourage more engagement in Cal TF.</i> |
| Get beyond utility needs being the focus of EE; find a way to get customer needs being a high priority; having more direct involvement and funds from the | <i>Agreed. We particularly like the suggestion of trying to leverage funds from other</i> |

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| state. | <i>states and having Cal TF serve a broader audience in the long term.</i> |
| A regular meeting spot would help with enough room for everyone. I know space is limited and TF staff has worked hard to find good spaces. | <i>Thank you. We have booked the PEC for the remaining of the year and will continue to work hard on facility logistics. Since our attendance continues to grow, we may ultimately need to find a new space.</i> |
| A few voices dominate discussions, not sure how to remedy this. | <i>We appreciate everybody's perspective and encourage all to participate how they see fit, even via email or webinar chat.</i> |
| Just a little more awareness of folks joining remotely would be nice. | <i>Hopefully the PEC's superior AV will help with this. We will also be more mindful of messages via the webinar interface.</i> |
| We need to better estimate the time required for the discussion of a particular topic (abstract, workpaper, update, etc.). Recently, I have felt that our agenda is cram-packed with not enough time to discuss. Yes, there IS a delicate balance, and maybe we're at the right balance, with subcommittees and follow-up phone calls taking the extended conversations off-line. But the feeling of cram-packed has been there. Again, that's not necessarily bad, but we do need to make sure we're not rushing to conclusion because the time slot has expired. So far, we may be doing well, but it is a factor that I think we need to watch. | <i>Thank you for the important observation. We will continue to be mindful of striking the right balance between giving the group enough material to fill the agenda without rushing you to conclusions.</i> |
| Is there a prioritization process CALTF is following to review and approve measures. More specifically, is there a ranked order list of measures that ensures that time spent in the monthly meetings are addressing the most impactful or hot topic items? Much of our meetings are driven by IOU specific topics. There are some members who are very vocal and others who say very little. Is there an opportunity to do team building in smaller groups to help solve a problem. This can help engage the quiet folks and allow them to participate in smaller settings. | <i>Yes, we do have a measure selection process but have not yet had to use it. We will continue to work towards getting more third party workpapers. We have seen that the smaller, more focused subcommittees tend to result in quieter participants becoming more vocal.</i> |

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| It would be useful to follow the progress and status of the workpapers that have been approved by the TF. Were they approved by the ED without comment? Did they run into roadblocks at the ED? Did TF approval influence approval by the ED? If not, what can we do differently at the TF so that our efforts facilitate and speed the process? | <i>Thank you for raising this important subject. We are tracking this facet of the process, and will brief the TF on CPUC feedback on Cal TF-reviewed measures as we get it.</i> |
| I'd like to see an expansion of the means that new measures are brought to the forum. It has not been an issue to date because we had a backlog of proposals, but an improved sourcing process will amplify the impact of Cal TF. | <i>We have welcomed non-utility-developed workpapers. We hope more third parties will submit workpapers as Cal TF gains recognition.</i> |
| Get explicit commitments from members to commit time and effort in their areas of interest. | <i>We have found that members with particular expertise are willing to contribute to subcommittees as needed.</i> |
| Greater use of sub-committees to vet and improve in process work; we appreciate seeing the evolution of the materials but it may be repetitive at times. | <i>We appreciate this feedback and will be mindful of it as we move forward.</i> |
| Yes, the forum needs to be more strategic and less tactical. Whether or not the issues will be well received by the PUC staff and consultants, the forum should be raising issues and making recommendations that will could lead to a better DSM process and programs | <i>Agreed. We were restricted in Year 1 on the issues Cal TF was allowed to address, but have expanded scope in Year 2 to consider issues that will be more broadly impactful.</i> |
| I would say we are on right path in tackling more complex issues such as DEER database, incremental cost, industry standard practices that have significant impact on statewide EE portfolios instead of focusing on one measure work papers. | |
| I would suggest not to pack the agenda with too many items. I understand the need to take up as many WPs, etc. for discussion during the meeting, but packing too many of these items in one meeting is not productive. | <i>Thank you for your feedback. We will keep this in mind as we strive to maximize our review output without sacrificing quality.</i> |
| 1. Improve measure coordination process among PAs. 2. Continue down the path of benchmarking other relevant data or approaches found elsewhere that we can leverage. | <i>We agree more work needs to be done on statewide measure coordination. We will continue to benchmark as we have found benchmarking to be a very</i> |

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| | <i>useful tool in improving technical outcomes and processes.</i> |
| None. Going well. | |

Question 4:

| What issues do you think the TF should work on in the coming term? Please be specific. | |
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| <i>TF Member Response</i> | <i>Cal TF Staff Response, if needed</i> |
| Maybe this is so obvious it doesn't need stating, but it is critical that the Cal TF demonstrate standing with the ED, showing that it can add value and help push through the logjam there, or perhaps even supersede it. Otherwise, utilities are likely to pull the plug on the experiment. To that end, clearly defining the process by which ED and Cal TF work together to complement each other is very important. I was pleasantly surprised at how quickly Cal TF took on DEER after its first year of baby steps. I think it's important that Cal TF be bold, fast-moving, and fearless, particularly when it comes to dealing with such a critical issue. This may be too far afield, but is there a role for the Cal TF for providing feedback to the EE strategic plans? | <i>We agree that if Cal TF does not ultimately reduce time, cost, and contention associated with addressing technical issues, the benefits of Cal TF do not outweigh the costs. We believe that the work and recommendations being developed in Year 2, if implemented, will lead to meaningful change.</i> |
| <ul style="list-style-type: none"> - Evaluate DEER database - Issue of baselines - M&V by 3rd parties, utilities and ED - Review of projects by ED | <i>Good topics</i> |
| My biggest concern is interaction with CPUC Staff and their role as final decision maker. Timing is critical for the process of approving measures and their savings for program delivery. | <i>Agreed. We are working on this.</i> |
| Addressing limitations of DEER (in both removing measures which don't work and getting new measures which do work); Having a permanent place to meet | <i>Our DEER work is scheduled to be finished by the end of this year. We expect the PEC will be our permanent meeting place unless we outgrow the space. We had some initial meetings at NRDC because we did not have enough advance notice of meetings to book the PEC.</i> |
| How to determine ISP and associated rules around | <i>We'll add this to the list of</i> |

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| ISP. | <i>2016 topics for consideration.</i> |
| Other issues besides work papers | <i>Agreed.</i> |
| We're particularly interested in (res) ducts, shell measures, and long-term improvements to DEER. Also DR and demand savings. | <i>Our DEER work is scheduled to be finished by the end of this year. We are actively interested in reviewing more building envelope measures as well.</i> |
| Maybe not the Cal TF, but someone (PAC, TF staff, whoever) should work on developing a strategy for changing the status quo. It's not quite a revolution; we're kinda standing by the side, doing "good work," and hoping the CPUC will notice. I think we need to develop a strategic plan for where we'd like the CPUC, the IOUs, and the POU's to be in 2 years vis-à-vis ex ante estimates. A simplified DEER? No (inappropriate) DOE-2 modeling? In short, what does success look like? | <i>Agreed. This work is in progress, and will be presented to Cal TF and PAC this year. We are already in discussions with CPUC staff on what a new and better future looks like.</i> |
| How do we get staff to approve new wps that come from CALTF in a timely fashion? If the CALTF can help alleviate this bottle neck, more measures can be adopted. Secondly, how do we get the TF members in front of the EAR team to discuss technical issues more openly? If there was a mechanism beyond the meeting notes and drafting memos to help resolve issues and exhibit CATLF's attribution to the wp development and approval process that can possibly help bridge the wp approval gap. A dispute resolution process would be ideal in the event there are differences in opinion between the EAR team and CALTF. | <i>Agreed. See above.</i> |
| I think the work on DEER Alternatives and Below Code are extremely important and should be high priorities for the TF. The TF probably can't take this on by itself, but the workpaper process is too slow and cumbersome. By the time a workpaper is developed and approved, technologies and market forces have changed and the workpaper is out of date. If we are serious about addressing the climate crisis facing us, we need to be bold and move quickly with new ideas, not spend a year on a workpaper analysis first. We need to work collaboratively to make reasonable assumptions about savings, implement programs, gather data as | <i>Agreed. See above.</i> |

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| we go, and make changes to programs as needed. Unfortunately, I don't have any concrete solutions to make this happen, so I should stop ranting. | |
| State of the art water heater designs Novel materials for the building envelope (smart glass/windows, high albedo coatings for vertical walls, etc.) | <i>We will add this to the measure list.</i> |
| Getting direct acceptance of TF work products by CPUC. | <i>Hmmm. . . Our goal now is to reduce cost, time, and resources associated with CPUC review. We don't believe the Cal TF review will ever be "in lieu of" CPUC review, but hope that it will be trusted enough that CPUC review can be fast and efficient. We have a plan in progress.</i> |
| Besides widgets and workpapers; the group has started looking at DEER alternatives. There may be other good ideas to consider such as program design recommendations. As the best engineering cannot overcome poor program design, that said, could a set of recommended best practices for program design be useful? | <i>This is beyond the scope of Cal TF. However, the rolling portfolio process envisions a stakeholder process for portfolio and program design. Hopefully this will get up and running and be effective.</i> |
| Changing the fundamental business as usual environment that hampers valuable DSM programs in the state of California. | <i>See above. This could be addressed in the broader stakeholder group envisioned in the rolling portfolio process.</i> |
| I would say we are on right path in tackling more complex issues such as DEER database, incremental cost, industry standard practices that have significant impact on statewide EE portfolios instead of focusing on one measure work papers. | <i>Agreed.</i> |
| We need to spend more time in what other technologies to consider. Think about alternative approaches to traditional M&V. Certainly, think about DEER alternatives. | <i>Our DEER work is scheduled to be finished by the end of this year. We will add alternative M&V to our list of possible crosscutting topics for the coming year.</i> |
| 1. Provide additional guidance (somewhat already discussed) to determine what should be included as part of a measure. | <i>We believe the Ex Ante Development Guidelines subcommittee will continue</i> |

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| <p>2. Addressing the CPUC "elephant" How to get the CPUC to weight in as part of abstract.</p> <p>3. May want to brainstorm the list of issues and prioritize those that should be worked.</p> | <p><i>to address your first suggestion. We are also continuing to fine tune our collaboration process with Energy Division staff; they too are interested in participating earlier in our process.</i></p> |
| I like the focus on DEER. | |

Question 5:

| Do you have any other comments? | |
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| <i>TF Member Response</i> | <i>Cal TF Staff Response, if needed</i> |
| Thanking for taking the leap and making Cal TF happen. I wish us all luck for many years to come. There's a lot of work to do yet! | |
| Overall our work has been slow considering the level of knowledge and experience of members. I believe this is due to shortcomings of the presented documents and lack of preparations of the presenters. | <i>We will continue to work with workpaper developers to improve the quality of the documents.</i> |
| I'm really honored to have the opportunity to be part of and contribute to the CalTF. I believe if CPUC Staff can work with the CalTF to move work papers to conclusion, the value of that process will be invaluable to California. | |
| Great staff and great leadership make this a pleasure. | |
| Thank you for your hard work. | |
| I'm impressed with the level of staff engagement and preparation for subcommittee meetings--the subcommittee and overall TF are already a good sized commitment; it's nice not to feel that the subcommittees are not just recruitment for leg work. Thanks! | |
| Annette and her staff have done a terrific job in developing and sustaining the efforts of the Cal TF. It really is a remarkable endeavor. Kudos all around, but to the staff, definitely. | |
| The transparency and dedication of CALTF staff. Well deserved recognition for a small team making a name for the CALTF recognized within the state. | |
| Looking forward to year 2! | |

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| Great work by Annette, Alejandra and Jenny! Couldn't do it without the focus you provide. | |
| I appreciate the opportunity to work with a great group of professionals! | |
| To date, the forum has been nothing more than a rubber stamp for specific DSM opportunities. To that end, it has probably been the most expensive rubber stamp ever. | <i>The Cal TF did not “rubber stamp” measures presented to it in Year 1. In fact, all of the measures presented to Cal TF in Year 1 were modified through extensive Cal TF discussion prior to receiving Cal TF “affirmation.”</i> |
| I am sure the utilities have some process by which they narrow down on the technologies that they consider. It would be nice to know how they make those decisions. Is it energy savings? Is it market potential? Is it easy of implementation? Etc. | <i>Cal TF’s measure selection tool was modeled on Southern California Edison’s stage gate process. The SCE model was altered to fit our needs based on input from the TF.</i> |
| Although it is appreciative that the NRDC offers their room, a better venue with better AV and HVAC would be better. | <i>We too appreciate NRDC’s hospitality, but have booked the PEC for our meetings for the remaining of the year. We look forward to leveraging their superior AV system.</i> |