

Topics

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- eTRM Transition Plan
- Status of eTRM as the Database of Record
- Outreach Plan

eTRM Transition Plan



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eTRM Transition Objectives

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- CPUC Staff to review & approve consolidated measures
- Commission to adopt:
 - The eTRM as the database of record
 - The eTRM data specification
- IOUs & POUUs to adopt consolidated measures & eTRM

Consolidated Measures Staff Guidance

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- Submit 3-4 pilot measures representing the range of issues addressed
 - Staff will review these for planning purposes, not official review
- Upload in small batches of 8-10 per month
 - WPA not available until after Sept 30
- Provide a procedures document
 - Schedule of submission
 - Questions/issues that need to be addressed
 - Flow chart of the process
- Complete Statewide Deemed Rulebook for guidance

Transition Plan Milestones

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Week of
August 20

- IOU Memorandum/Procedures Document

Week of
August 27

- 3-4 pilot measures
- Meet with ED staff/EAR team on measure format

1st Monday
in October

- 1st Technology Category Meeting
- Submit 1st Batch

November

- Submission Schedule Review Meeting

IOU Concerns

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- Scope/intent of measure consolidation
- Phase 1 or Phase 2
 - ❑ Retroactive changes
 - ❑ Effective dates
- Submitting Stage 2 issues
- How will ESPI scores be impacted
- Measure updates
 - ❑ Apply to SW measures only
 - ❑ Sept 2018 DEER resolution

eTRM as the Database of Record

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Motion to make eTRM the Database of Record

Motion to ALJ Seeking Approval to Consider Issues in Phase 3 of Rolling Portfolio Proceeding

- Substantive Request: Consider whether eTRM should be “database of record” for approved deemed values, including eTRM Data Specification as data specification for new and updated measures
- Procedural Request: Adopt process for considering whether eTRM should be the “Database of Record” for deemed ex ante measures
 - File eTRM with all consolidated measures and all documentation on Jan. 15, 2019
 - Conduct 4 demos/trainings throughout State to demo eTRM and review documentation: by Jan. 31, 2019
 - Joint CEC–CPUC Workshop (Full Day) comparing features/opportunities/challenges of continuing with DEER or switching to eTRM as Database or Record. (Mid-February 2019)
 - Joint CEC–CPUC Workshop (Full Day) on proposed eTRM Data Specification for deemed (new and updated) measures (mid-February 2019)
 - Briefing (no cross)
 - Opening Comments: March 15, 2019
 - Reply Comments: April 15, 2019
 - Commission Decision by June 1, 2019

Outreach Plan

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Objectives

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- Ensure target organizations understand:
 - ❑ The features/functionality of the eTRM
 - ❑ The benefits of eTRM adoption associated with developing, adopting, reviewing and using measures
 - ❑ The challenges of the current state and how it adversely impacts various energy efficiency stakeholders (such as utilities, third party implementers, regulators and others)
- Agree to be a party to the Motion and/or sign a letter of support
 - ❑ Seeking 30 parties

Target Audience

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- Program administrators (IOU, POU, REN/CCA)
- Regulatory (CPUC, CEC)
- 3P Implementers
- EM&V contractors
- Other stakeholders
 - Labs & universities
 - Environmental (Sierra Club, EDF)
 - Advisory groups
- Intervenors (NRDC, TURN, ORA)

- One-on-one meetings
- Group/brown bag meetings within target organizations
- Meetings or presentations through industry forums
 - CEDMC*
 - AESP*
 - CAEECC
 - CPUC Quarterly EM&V Meeting
 - NAESCO
 - ACEEE Summer Study informal sessions*

Your Feedback & Assistance

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- Identify appropriate contacts within target organizations
 - Leadership who can commit support
 - Others influencers
 - Likely eTRM users
- Make introductions/facilitate outreach