

# Measure Review / Consolidation Process



**ANNETTE BEITEL**  
**APRIL 2017**

# Overview

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- Cal TF Technical Position Paper (TPP 6): Overlapping Measure Consolidation Process (Prior to eTRM Placement)
  - Developed/Affirmed by Cal TF after multiple rounds of input from Cal TF, IOUs, POUUs
  - “Test and Learn”
- Measure Consolidation/Review In Practice
  - Where are we?
  - Moving forward
- Technical Approach
  - Next presentation

# Measure Consolidation Flow Chart

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## Cal TF Staff

1. Identify Measures
3. Identify WP & POU TRM
4. Identify Sources

- Statewide Measure List

## Cal TF Staff

8. Identify WP Differences & Issues
7. Complete Overlapping WP Template

- Workpapers
- CEDARS Data
- Ex Ante Tables

- Excel Summaries
- Pivot Tables
- Decks Summarizing Measures & Tables

## IOU/POU Tech Staff

11. Identify Other Potential Issues
12. Challenges to Developing Statewide Measure

- IOU/POU Pre-Subcommittee Meeting

## Subcommittee

2. Subcommittee Formation
9. Address Issues Identified
6. Assess If Data is Sufficient
17. Subcommittee Measure Recommendations
16. Assess Measure Future

## Cal TF Staff

5. Gather / Analyze Sources
10. Compare to Values in Other TRMs (if needed)

## Full TF

19. CalTF Peer Review / Affirmation

## Cal TF Staff

- 14,20. Populate Draft & Final eTRM Template and Upload into Repository

## CPUC Staff

21. CPUC Approval of Measures and Repository

13. CPUC Consultation
18. Obtain CPUC Staff Feedback

*Back for additional consultation, if needed*

\*Note: Numbers refer to steps in TPP#6.

4/21/2017

# Heightened Cal TF Engagement

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## Cal TF Review of 75 Consolidated Measure in 2017

- Most of the measures are already in use and in some cases went through formal review and approval
- Measures will be grouped by end use and discussed together in Cal TF subcommittee (will include outside experts as well as Cal TF members)
  - ▣ Proposed Subcommittee “Champions”: 1 each: IOU, POU, Cal TF or outside expert
- Full TF Approval: TF members will be provided with consolidated measures by end use, with memo identifying key issues/judgment calls made by subcommittee. TF meeting will focus on memo, not individual measures
- TF will then be asked to approve all measures in end use category. TF could choose to approve category of measures and exclude one or more measures from approval based on unique considerations

# Heightened IOU/POU Engagement

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## **What are the expectations/needs for IOU/POU involvement in the consolidation process?**

- Based on technical knowledge, institutional experience, and program experience, they are critical to supporting the measure review/consolidation work
- Although the day-to-day responsibility of consolidating measures is a Cal TF staff responsibility, the IOU/POUs will play a critical role in ensuring the eTRM works for them when completed
- Cal TF staff will ask IOU/POUs (technical and program folks) to identify key issues/pitfalls up front, then participate in Cal TF subcommittees, along with Cal TF members and external experts.

# CPUC Staff Engagement

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## What role will the CPUC Staff play in the consolidation process?

- Original Plan: Active engagement every step of way.
- Current Plan
  - Inform/solicit CPUC Staff input to ensure they are comfortable with approach and process.
  - To ensure transparency, we will keep them continually informed of our progress while affording them the opportunity to get involved at any point they choose.
  - Formal approval of initial measures is not anticipated until early 2018.
  - CPUC Staff has been extremely prompt and responsive to our requests for information – e.g. EESat, claims and DEER data. Also, providing input on technical “overarching” issues.
    - ✦ Unresolved outstanding questions on ownership of certain DEER data.

# Next Steps

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1. **Convening 2017 Technical Subcommittee(s) (by end use)** which will be comprised of Cal TF members, IOU/POU WP representatives and Cal TF staff to address specific measure categories. Determine if additional industry expertise is needed for any measure category.
  - Phase 1: Subcommittee review of “key differences”; cross-cutting issues; policy issues
    - ✦ Based on Cal TF Staff review of Workpapers to identify differences between Measure Offerings (i.e., Measure Application Type, Delivery Type, Offerings).
  - Phase 2: Subcommittee review of detailed differences between WP
    - ✦ Cal TF Staff creates Pivot Tables from ex ante tables that can compare Measure Permutation differences (i.e., savings, cost).
  - Phase 3
    - ✦ Reconvene subcommittee if additional discrepancies arise while Cal TF Staff moves measures into the eTRM template.
  - First 4 Subcommittees (Kick-off April Cal TF Meeting): Commercial Refrigeration; Food Service; Agricultural/Pumping; Water Heating
    - ✦ Forty-nine (49) measures total
  - Time period: April – May; Present Recommendations in June Cal TF meeting

# Next Steps

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## 2. Identifying “Champions” for coordinating on measure consolidation issues

- ❑ Will need to coordinate input from IOU/POU technical AND program
- ❑ Should statewide program lead for each category have greater involvement in measure consolidation process?
- ❑ Outside experts to ensure eTRM “best-in-class”

## 3. Finalize eTRM data specification and data dictionary

- ❑ Once eTRM repository provider on-board

## 4. Regulatory Considerations **[More work needed]**

- ❑ Identify, summarize and pursue needed regulatory approval and changes that will be required to authorize the changeover to the new eTRM.
- ❑ Catalog policy and technical issues to create “Compendium” of clear rules; flag those that may need regulatory reconsideration
- ❑ Time to convene SW “Policy” workgroup to model SW SME group?



# Next Steps

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## 5. Program Considerations **[More work needed]**

- ❑ How will programs be impacted by switch to eTRM?
- ❑ How much time do programs need to adapt to any changes?
- ❑ How do we ensure 3-P are given sufficient opportunity for input and engagement?
  - ✦ We are relying on IOUs/POUs as “proxies” for identifying key issues as they oversee complete portfolios, but 3-P need voice as well.

## 6. Systems Considerations

- ❑ How do IOU/POU/Regulatory tracking and reporting systems connect with and “talk” to eTRM?
  - ✦ Lots of work has been done on this, but more to do.