

# 2015 Business Plan: Q4 Progress Report



**CALIFORNIA**  
TECHNICAL FORUM

**ANNETTE BEITEL**  
**DECEMBER 10, 2015**

# 2015 Business Plan Overview



1. Clearly memorialize DEER, other ex ante requirements, methods, and assumptions for select HIMs (High-impact measures)
2. Review 15 measures and approve select workpapers
3. Develop cross-cutting technical position papers (at least 3)
4. Review and update POU Technical Reference Manual for select HIMs
5. Facilitate statewide coordination of IOU workpapers
6. Manage RFQ for TF members to be seated June 1, 2015
7. Develop 2016 Cal TF Work Plan

# Goal 1. Clearly Memorialize DEER and other Ex Ante Requirements for Select HIMs



- Combined work for Goal 1 and Goal 4 (POU TRM documentation)
- List of measures reviewed or in review

Clothes washer
Appliance recycling
Low flow showerheads
Faucet aerators
Residential LEDs
Commercial LEDs
Commercial air conditioners
Whole House Fans
VFDs for pumps and motors
EC motors for refrigeration

- Key subcommittee interim recommendations:
  - ❑ Deemed measures should be in TRM format.
  - ❑ Measure documentation for DEER measures should contain the same level of detail and transparency as found in IOU workpapers.
- Key Conclusion: Need alternative to DEER

## Goal 2. Review and Approve Selected Workpapers



- 2015 Goal Achieved: Review at least 15 measures
- 2015 Cal TF measures reviewed:
  - Tier 2 Advanced Power Strips (SDG&E) – Interim WP
    - ✦ Residential
    - ✦ Commercial
  - Clothes Washer Recycling (NRDC) – Interim WP with condition
  - LED Retrofit Kits for Schools (SCE)
  - LED Recessed or Surface-Mounted Panels (PG&E)
  - Retail Plug Load Portfolio (PG&E)
    - ✦ Six measures through one platform: Freezers, electric clothes dryers, gas clothes dryers, room air conditioners, room air cleaners, and sound bars.
  - Laminar Flow Restrictors for Healthcare (SCG)
  - Variable Refrigerant Flow (PG&E) – WP in development
  - Residential HVAC Quality Installation (SCE) – Awaiting final data/WP
  - Ductless Mini-Splits (Cal UCONS) – Awaiting final data/WP
  - Smart Thermostats (All IOUs) – Awaiting pilot data
  - LED Linear Tube Replacement (SDG&E) – Discontinued

## Goal 3. Develop Technical Position Papers (at least 3)



### □ 2015 TPPs

- ✦ Technical Position Paper #1: Savings to Code Subcommittee Technical Position Paper
- ✦ Technical Position Paper #2: Electronic TRM Technical Position Paper (Draft)
- ✦ Technical Position Paper #3: Modeling Engine Comparison Technical Position Paper (Draft)
- ✦ Technical Position Paper #4: Best Available Data (Draft)
- ✦ Technical Position Paper #5: Measure Complexity (Draft)
  - NOTE: “Draft” papers incorporate subcommittee input; peer review in progress and will be before Cal TF in January for approval.

## Goal 4. Review and Update POU Technical Reference Manual



- Combined work for Goal 1 (DEER documentation) and Goal 4
  - ❑ Observation: Much of POU TRM draws from DEER; but information is organized in much easier-to-use TRM format.
- Will include recommendations tailored for POU TRM measures
- Same key findings and conclusion from Goal 1 apply here

## Goal 5. Facilitate Statewide Coordination of IOU Workpapers



- CPUC Staff Directive: IOUs must coordinate on WP development and submit only one WP per measure. Staff has welcomed Cal TF staff role in coordinating WP.
- Statewide list of IOU workpapers compiled and posted to Cal TF website in early April
- Current:
  - ❑ 2016 measures identified (IOU, POU, 3-P)
  - ❑ Will implement “Measure Selection Process” to identify Cal TF measures for 2016
- Q1 2016
  - ❑ Collect and post current **active** IOU WP.
  - ❑ Identify level of effort needed to consolidate.
  - ❑ Identify level of effort needed to review key parameters to update.

## Goal 6. Manage RFQ for Year Two TF Members



- Only two inaugural members chose to step down
  - ❑ Reached out to more focused, limited potential bidder's list
- Very successful round two RFQ
  - ❑ Received responses from more highly qualified applicants than available spots.
- Number of TF Members expanded
  - ❑ Combination of very high technical skill and holistic balancing
  - ❑ Large enthusiasm for crosscutting subcommittee work—more members add depth to Cal TF's pool of expertise
  - ❑ Current TF head count: 35 TF members, up from 29 last year
- 2016 Solicitation – Questions for PAC include:
  - ❑ Identify who would like to continue
  - ❑ Consider whether to expand expertise (EM&V?)
  - ❑ Determine term(s) for existing/ongoing members.



# Goal 7. Develop 2016 Cal TF Work Plan



- Draft 2016 Cal TF Business Plan is prepared, reflects input from TF members, IOU technical staff
- 2016 Cal TF Business Plan:
  - Consistent with Cal TF mission
  - Continues with core 2015 work:
    - ✦ Measure review
    - ✦ Statewide coordination of measure development
    - ✦ Technical Position Papers to address cross-cutting issues
  - **New Critical Initiative for 2016:**
    - ✦ **“Electronic TRM Project”**: Specific actionable plan for addressing and resolving the significant problems with new measure development and updating based on extensive best practices research, significant input from state and federal technical experts, and extensive, detailed and thoughtful analysis by highly capable and experienced Cal TF staff.
    - ✦ **“Partial” PAC approval sought for eTRM**
      - Continue planning to assess level of effort; specific tasks; roles and responsibilities; cost
      - Seek CPUC and CEC staff approval in Q1.
        - This includes meaningful staff input on details.

# Conclusion



Cal TF, by many metrics, including the 2015 Business Plan goals, has achieved success.

*However*

Absent significant changes it will not be able to make significant positive changes for metrics that really matter: Timeliness, reduced costs, transparency, collaboration that leads to well-documented statewide savings values.

**The “eTRM” project will achieve such change.**

CPUC and CEC staff direct involvement in eTRM and measure development is absolutely critical for success.