

2016 Business Plan: Q1 Progress Report



CALIFORNIA
TECHNICAL FORUM

ANNETTE BEITEL
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2015 Business Plan Overview



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1. Review and approve selected measures (at least eight)
2. Facilitate statewide coordination of IOU workpapers
3. eTRM: Continued development of project plan
4. Develop technical position papers related to eTRM
5. Release RFQ for TF members to be seated June 1, 2015
6. Develop 2017 Cal TF Work Plan
 - ✦ Later in year
7. Cal TF, Third Year Review
 - ✦ Later in year

Updated Task: 3b – “Phase 1” eTRM Implementation

Goal 1. Review and Approve Selected Workpapers (at least 8)



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- 2016 Cal TF measures for review

- POU TRM Measures

- ✦ LED Outdoor Pole Decorative Fixture*
 - ✦ LED Fuel Pump Canopy*
 - ✦ LED Wallpack*
 - ✦ Interior LED Downlights*
 - ✦ Whole Home Fan*
 - ✦ Energy Star UPS (Uninterruptible Power Sources for LED Lockers)

- Third Party Measures

- ✦ Ductless Mini-Splits*
 - ✦ Efficient Pumps*
 - ✦ Smart Thermostats*

- IOU Measures

- ✦ LED: Garage Luminaries; Outdoor LED Signage
 - ✦ VFD: Fluid Pump VFD, Well Pump VFD, Process Pump VFD

- Repair Indefinitely/To Code

- ✦ Subcommittee discussion options; WP Sponsor needed for any selected measures

NOTE: * means in review.

Goal 2. Facilitate Statewide Coordination of IOU Workpapers



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- CPUC Staff Directive:
 - IOUs must coordinate on WP development and submit only one WP per measure
 - ✦ IOU staff has welcomed Cal TF staff role in coordinating WP
- Public list of IOU workpapers available on CalTF.org and updated monthly
 - Collected current active IOU non-DEER WPs (388 Total)

Goal 3a. Continue Development of eTRM Project Plan



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- Project plan is detailed in the following documents
 - TPP2: Electronic Technical Reference Manual Proposal
 - ✦ Initial work scope, project timeline, roles and responsibilities
 - Technical and Process “Key Issues” Documents
 - ✦ Technical:
 - Key issues identified
 - Background research performed
 - TF Subcommittee to recommend resolution for full TF review
 - ✦ Process
 - Many key issues identified
 - Developing proposed approaches
 - Other eTRM documents
 - ✦ Stakeholder deck and one-pager

Goal 3a. Continue Development of eTRM Project Plan



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- Collect all IOU active measure WPs and assess level of effort to consolidate
 - WPs collected
 - Developed process for review/consolidation of current measures (IOU and POU TRM)
 - Level of effort:
 - ✦ 170 measures (not including DEER measures without WP), 427 WPs for consolidation (includes POU TRM measures)
 - 12.5 days of engineer time per measure
 - 4 days of project management/oversight/coordination and facilitating review by EAR Team and Cal TF
 - Case Study: LED – Outdoor Lights
 - ✦ Observations

Goal 3a. Continue Development of eTRM Project Plan



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- Develop specifications and available options for developing or procuring eTRM repository
 - ❑ eTRM “charette” with IOU/POU tech and reporting staff
 - ❑ Reviewed available commercial options
 - ❑ Developing and/or gathering:
 - ✦ Data fields (e.g. text, algorithms, point values, pointer to modeling tool)
 - How many are really needed?
 - ✦ Data structure
 - ✦ DEER building prototypes
 - ✦ Common data sets/approaches
 - ✦ Controller for eTRM interface with modeling tool
 - ✦ “Administrative” issues
 - Who gets to view, download, review “in progress” measures, modify measures?
 - ❑ **End Game: Draft RFP for review by IOU, POU and Commission staff**

Goal 3a. Continue Development of eTRM Project Plan



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- Identify Technical Position Papers needed to ensure measures developed in consistent and cost-effective way:
 - List of issues in “Key Technical Issues” document
 - Issues for possible TPPs include:
 - ✦ Validation protocol for modeled measures
 - ✦ Using data to update measured savings
- Seek CPUC and CEC Support of Plan
 - Working on “Next Steps” document – In part intended to memorialize approach to collaboration; early and regular input so end product acceptable to CPUC.

Goal 3a. Continue Development of eTRM Project Plan



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- Develop budget that will not lead to increase in WP development costs and will reduce costs over time
 - Budget for eTRM development and ongoing Cal TF management
 - ✦ Roughly equal to NW RTF budget
 - NW RTF budget: \$1.8 million
 - Reasonable upper limit for Cal TF
 - ✦ Key budget elements
 1. Facilitation/project management – No change
 2. Increase in engineer time (5 FTEs)
 - Can some be filled by existing staff at IOUs/POUs?
 3. eTRM development/licensing cost
 - Vendors HIGHLY sensitive to public discussions (trade secret); ranges can be discussed with funders.

Goal 3a. Continue Development of eTRM Project Plan



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- Develop budget that will not increase current WP development costs and will lead to cost savings after eTRM project is completed
 - ❑ Cost drivers/savings opportunities described in memo
 - ❑ Estimated savings opportunities exceed proposed budget for eTRM
 - ❑ Cost savings will persist after completion of eTRM
- Seek CPUC/staff approval of plan – Reach agreement for meaningful, ongoing staff participation
 - ❑ Cal TF staff working with CPUC staff to finalize eTRM “Next Steps” memo that addresses CPUC staff engagement in Cal TF process
 - ❑ Annette Beitel and Pete Skala to then present joint memo to Dave Gamson

Goal 3a. Continue Development of eTRM Project Plan



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- Clarify and Secure Commitments for eTRM Key Tasks
 - **Cal TF Members:**
 - ✦ Clarified and expanded (with member consent) Cal TF Member duties
 - **Cal TF Staff:**
 - ✦ Cal TF staff expects to summarize measures, identify similarities and differences in overlapping measures, prepare measures for EAR Team and Cal TF Review
 - ✦ Once reviewed/approved, prepare measure for placement into eTRM
 - Open Question: IOU bandwidth to help with measure review/consolidation?
 - **CPUC Staff Involvement:**
 - ✦ Cal TF Staff has requested early and ongoing feedback during measure review/consolidation
 - ✦ CPUC Staff in process of assessing how they are able to engage
 - Staff has been responsive and helpful in providing input on eTRM project plan and deliverables

Goal 4. Develop Technical Position Papers Necessary for eTRM



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- 2016 TPP(s) will support eTRM development
 - **Update: 2015 TPPs**
 - ✦ CPUC Staff has provided meaningful, substantive, helpful feedback on Cal TF 2015 TPPs they have reviewed
 - ✦ CPUC Staff turn-around time quick
 - **Candidates for 2016 TPPs**
 - ✦ When is it appropriate to use proprietary versus open source tools?
 - ✦ Consistent approach for validating modeled tools measures?
 - ✦ How will metered evaluation results be used to update individual measures?
 - ✦ When is it appropriate to use metered versus deemed/calculated approaches for developing savings estimates?

Goal 5. Manage RFQ for New TF Members



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- 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
 - We want to keep at 35, will need to fill 7 – 8 positions.
 - Needed expertise: Behavioral, modeling, statistics, study design, EM&V.
 - Requested continuing members to stay through completion of eTRM to maintain continuity through eTRM process
 - Stagger thereafter
 - PAC volunteers for upcoming RFQ?

Updated Task 3b: Phase 1 eTRM Implementation



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- **Cal TF-Requested Changes to Phase 1**
 - Focus on High-Impact Measures
 - Ensure measures are still used and useful
 - ✦ e.g. Refrigerated Strip Curtains
 - Current IOU measures don't get a pass
 - ✦ Review to ensure measures current and reflect best practices.
 - ✦ Sources need to be gathered and reviewed.
 - ✦ Cal TF Subcommittee should review measure summary, recommend when measure needs full review (sunset date)

Updated Task 3b: Phase 1 eTRM Implementation



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- Measure review and consolidation process
 - Checklist and template-driven process
 - ✦ Checklist: Non-Overlapping Measure Review
 - ✦ Checklist and Template: Overlapping Measure Comparison
 - ✦ Template: Workpaper Source Quality Analysis Template
 - ✦ Template: Other TRM Analysis
 - Process: overlapping measures
 - ✦ Summarize and identify similarities/differences
 - ✦ Gather and analyze source documents
 - ✦ Compare measure parameters in select TRMs
 - ✦ Subcommittee input to harmonize inputs
 - ✦ Place measure into eTRM data form

Updated Task 3b: Phase 1 eTRM Implementation



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- Measure review process: Not overlapping measures
 - Summarize measure parameters – Algorithms, data, sources, values
 - Gather and analyze source documents
 - Compare measure parameters in select TRMs
 - Subcommittee input on measure
 - Place measure into eTRM data form
- What About DEER Measures With No WP?
 - Current plan – Asking EAR Team to provide WP information for each DEER measure
 - ✦ No DEER measures are documented in WP format
 - What is our plan B?