

Stakeholder Comments and Revisions for 2024 Business Plan and 5-Year Roadmap

Document	Commenter	Received	Comment	Change (Y/n)	Response
BP	Steven Long	Nov TF Meeting	Goal 1: We have discussed MF housing over the past year; there are programmatic, data, MP gaps. We need more comprehensive solutions. Small business may have similar issues. There are likely other gaps – and we just need to identify solutions for these gaps.	Y	In Goal 1A supplemented Tactic, added small business to the existing list: "Addition of other measure types, such as low-income or equity measures, C&S measures, small business , NMEC measures, other IDSM resources"
BP	Steven Long	Nov TF Meeting	Goal 3 - Suggested adding support to operationalize viable electric alternative (VEA) requirements	Y	Added Tactic: " Coordinate and facilitate statewide processes " This will also be used to describe the Tuesday 2pm meetings.
BP	M. Costa	Nov PAC Meeting	Cal TF Staff should identify related proceedings that may impact Cal TF and identify how it will engage and/or monitor	Y	Added as a required White Paper for 2024 (see Goal 6B)
BP	M. Costa	Nov PAC Meeting	Assess how CPUC NMEC policy should be considered by Cal TF.	Y	Reference to NMEC added in Custom Process Initiative Section
BP	A. Saiyan; H. L	Nov PAC Meeting	Cal TF Staff will work with interested participants, including PG&E, LADWP and SDG&E to review current QA/QC and identify additional improvements/changes needed.	N	Ownership should be included in the stakeholder outreach process; I expect it will be included, but I did not add it in explicitly since it is just a part of the "development and updating process".
BP	Steven Long	11/21/2023	Metric 2a: Should ownership and responsibility to "own" and update measure packages and related resources be part of this?	N	
BP	Steven Long	11/21/2023	Metric 2b: "Train a Measure Manager within the IOUs and LADWP to be "single point of contact" This should read: "... PAs and LADWP..." "And Measure Developers and Measure Reviewers (including IOUs, POUs, CPUC consultants, CPUC Staff, and 3Ps) will take the appropriate eTRM measure training." Should include PAs.	Y	Changed the Tactic to Others (IOU->PA). I don't think it makes sense to train a Measure Manager for each CCA/REN since their development activities are extremely limited. Added a line to the Tactics (Cal TF Staff): " CCAs and RENs will have the training made accessible "
BP	Steven Long	11/21/2023	Goal #3. Not sure how you want to address "expanding" current measures that need additions (e.g., MF) and/or any other needs, but I think there should be a carveout for this as well, even if not "new" CALTF staff helped to kick start this in 2023.	N	Expanding measures are included in the existing new measure process already. We will include feedback on ways to improve development during the 2A discussions.
BP	Steven Long	11/21/2023	Metric 5A/5C: Should ownership and responsibility to "own" and update tools and related resources be part of this?	Y	Added text to include plan for ownership and maintenance of Custom resources.
BP	Steven Long	11/21/2023	Metric 5A/5D: One of the things that got dropped as part of the T2 WG was prioritization of other policy clarifications beyond 5162(?). It would be good to elicit input from stakeholders and start working on these as well. The customized guidance document never achieved multiple things it was meant to achieve.	Y	Added text to clarify such policy clarifications will be included in 5A; as needed, policy proposals would be incorporated in 5D
BP	Steven Long	11/21/2023	Metric 5b: for metrics, should the template include payback calculator and ensure consistency in how its applied SW.	N	First step of 5B will be to list of program admin templates & tools that should be standardized
BP	Steven Long	11/21/2023	Metric 5C: "POUs, IOUs, TF members, CPUC, and other stakeholders will provide input throughout the process." Should change to POUs, PAs, TF members, CPUC, and other stakeholders will provide input throughout the process."	Y	Updated text; replace IOUs with PAs
BP	Eric Noller	11/28/2023	3A - "custom, deemed, other" - replace Other with Hybrid?	Y	Added hybrid to the list, but also kept other since this is likely to keep expanding to NMEC, load shifting, etc. Yes, for Custom Measures, the "Custom Measure Characterizations" are equivalent to hybrid; other sources of hybrid measure are address in Goal 3
BP	Eric Noller	11/28/2023	5C - Does this include hybrid measures?	N	
BP	Eric Noller	11/28/2023	5D - Can / will solutions involve policy changes? Will CPUC be involved in these discussions?	N	5D will include proposals to address policy challenges, and yes - we absolutely will continue to engage with CPUC. Cal TF will facilitate development of policy proposals (i.e., proposals for potential policy change) - only CPUC can change policy.
Roadmap	D. Ritchie	Nov PAC Meeting	All supplemental funding requests need draft budget and proposed tasks.	Y	Added language to Budget section that Cal TF Staff will provide a budget and tasks for any supplemental funding requests.
Roadmap	Lake Casco	Nov TF Meeting	Goal 4: there are a lot of non-EE things planned; how do we get funding outside of the normal channels?	N	Items needing additional fundings are marked in blue (e.g., if supporting a different goal or outside of EE); we do need to respect those boundaries
Roadmap	Spencer Lipp	Nov TF Meeting	Goal 4: Integration will be great; being able to download CET files has been great. Consider adding searchable functions to create a CET file based on climate zones, building types, etc P,2, Key metrics. Average end-to-end time to do major task XYZ (review a MP), should be one of them. One of my big concerns relative to review timelines	N	It will add it to the eTRM enhancement log. One result from the Communications/Version memo was to build out the measure/permutation report features (more selectable).
Roadmap	Steven Long	11/21/2023	Goal 1 background. My understanding is that the CPUC will be taking over ownership of the eTRM at some point. Is this anticipated as part of this goal?	N	We will refine metrics as part of goal 2A.
Roadmap	Steven Long	11/21/2023	Goal 1 : Should incremental VEA reporting infrastructure be added to this goal?	N	CPUC is not taking ownership of the eTRM but governance principles will be included in Goal 1a.
Roadmap	Steven Long	11/21/2023	Goal 2: As with the Biz plan, MP ownership/maintenance needs to be addressed.	N	This is too detailed; if stakeholder identify specific VEA enhancements, they could be included in Goal 1b. So far, no requests have pointed to new enhancements.
Roadmap	Steven Long	11/21/2023	Goal 2 : Should incremental viable electric alternatives (VEA) screening be added to this goal?	N	The CPUC previously stated in a DEER Resolution (E-3513 - ch) that Measure Package are owned by the CPUC. Specifying VEA is too detailed; we already have: "Coordinate, conduct, and organize all measure management and updates (ongoing)" that refers to facilitating statewide activities.
Roadmap	Steven Long	11/21/2023	Goal 2 : Clarify that the second and third bullet "time" is meant to be duration in addition to hours spent?	N	Part of goal 1 will be to define actual metrics; in the past hours/cost has been the goal, but the data to maintain this value was not broadly available. Part of goal 1 will be to understand if this is desired and feasible.
Roadmap	Steven Long	11/21/2023	Goal 2. One objective should be to reduce end-to-end duration, which I think is steadily increasing....	Y	Agreed, as previously stated part of 2A. In addition, we will be interviewing measure developers in 2024 to understand what issues are extend approval cycles; it may be more accurate to say that issue resolution (of certain types) takes too long. Adjusted one of the Stakeholder Benefits: "Reduce measure development cost and end-to-end time through clarity in the process and workflow automation"
Roadmap	Steven Long	11/21/2023	Goal 2: "Accelerate measure uptake of at least (5) new measures or new offerings." Unclear if offerings is meant to address offers within a measure. I think this point (or perhaps another one)... should address increasing measure offerings to underserved sector/s segments (e.g. MF. Public).	N	Goal 1A could look to extend offerings as well as new measure types.
Roadmap	Steven Long	11/21/2023	Goal 3: As with Goal 2, time should include duration from start to finish and also should have an objective of lowering the end-to-end processing time. I noticed there is a duration in the to reg part, that really should encompass all steps, not just reg.	N	Goal 3 has both start to submittal and submittal to approval. I think it is captured.
Roadmap	Steven Long	11/21/2023	Goal 3: "Dive quality and consistency in measure" should be "Drive quality and consistency in measure"	Y	Good catch!
Roadmap	Steven Long	11/21/2023	Goal 4: "Incorporate potential data at measure level to track progress and identify shortfalls: " I'm unclear what this is meant to do. Is this review/duration data?	N	This data would come from Potential and Goals studies . Is the measure gaining market penetration consistent with the potential in the P&G study?
Roadmap	Steven Long	11/21/2023	Goal 5: As with the Biz plan, tool ownership/maintenance needs to be addressed.	Y	Added as explicit metric to clarify ownership and mangement plan
Roadmap	Steven Long	11/21/2023	Goal 5: Not sure I favor custom review at this point, given data privacy concerns, staffing and other issues.	N	This is on Roadmap at PAC request as item to consider; not in Business Plan. We will explore benefits, challenges, requirements, etc. in depth before bringing into a Business Plan.

Roadmap	Steven Long	11/21/2023	Goal 5: There is no mention of NMEC. We've avoided that for custom measures codes/initial ones, but NMEC is experiencing the same type of issues as other measure types and is being touted as the silver bullet to solve problems. It should be on the road map....] The thing we are finding is that while NMEC is "part of custom", it has significant differences, calculation approach, influence, baseline, NTG etc. So I hate to double this by creating a separate NMEC section (and SEM certainly has similarities and differences). Perhaps go through each of the custom bullets and be more explicit with regards to NMEC? I think most of the overarching points apply, but I think the way they apply may end up being different and the regulatory guidance is different as well. I'm also note sure if any of them are "small"	Y	Added general statement that NMEC and other measures types are included within the Custom Initiative.
Roadmap	Steven Long	11/21/2023	Goal 7: I'm surprised, that I keep needing to point this out, but both the RENs and the GET program are key stakeholders and never seem to be consistently addressed in these documents (I do see RENs under the soon to engage). Please make sure as you update these, these omissions are fixed.	Y	Added GET to the list in Roadmap-Goal 7 and BP-Goal 1a. You are correct that we need to engage RENs and the CCAs who are administrating efficiency. We address in Roadmap and have started reaching out to both.
Roadmap	Steven Long	11/21/2023	Budget: The plan does not really address staffing and/or subs required to meet these goals. Given that section 5 contains a budget, it seems that the staffing projections should be included here as well.	N	Roadmap shows the 5-year budget and which potential activities would likely require additional budget. If Cal TF assumes tasks that require additional budget, Cal TF Staff would prepare a budget request, which would be reviewed/approved by the PAC. Cal TF does not develop either staffing plans or subcontracting plans through either the Business Plan or Roadmap.
Roadmap	Steven Long	11/21/2023	Budget: As noted with the second bullet, will there be an impact due to CPUC ownership of the eTRM, or did this change?	N	CPUC determined in a Resolution that it would not assume ownership of the eTRM.
Roadmap	George Beeler	11/28/2023	Regarding Key Metrics page 2: A. Under Quantitative consider adding: 1. Reduce the GWP of energy production and use. 2. Reduce societal costs of energy use including those that are difficult to monetize like: a. Health risks of air and water pollution from energy generation and fuel production like fracking. b. Health risks and loss of productivity from poor indoor air quality. c. Benefits of EE higher ventilation rates for reduced infection rates during pandemics and flue.	N	Good comments but we are not funded to do this analysis. Perhaps we could propose how we COULD reasonably track these metrics using existing data sources through a White Paper. We are interested in any thoughts you may have.
Roadmap	Eric Noller	11/28/2023	Key Metrics - Qualitative: Not sure how to say this in fewer words, but another qualitative metric could be something like "aligning goals to balance with all stakeholder interests (including but not limited to rate payers, vendors, implementers, utilities, state, others)".	Y	Good idea. Cal TF tries to consider, solicit input from, and balance interests of all stakeholders, but we do not have this language explicitly stated. Added edits to include.
Roadmap	Eric Noller	11/28/2023	Cal TF Initiatives: Does this include hybrid measures? Should that be stated in the goal name?	N	Yes, Hybrid included in 3rd metric "Identify, Consolidate, and Develop Statewide Custom/Hybrid Measures and Tools (2024)"
Roadmap	Eric Noller	11/28/2023	Goal 1 - How will the one resource be selected? i.e. how will these be prioritized and who decides?	N	Guidance supported by key stakeholder interest and input, but the PAC will approve these activities in the Business Plan for following years. Funding availability will impact what can be done. Edited to annual effort.
Roadmap	Eric Noller	11/28/2023	Goal 1 - Interested to know more about this and what specifically the tools will do.	N	Goal 1a (eTRM roadmap) and Goal 4 (data integration/analytics) will help drive what tools will do.
Roadmap	Eric Noller	11/28/2023	Goal 2, Accelerate Measure Uptake - How will this be done?	Y	Removed Goal from draft as we had previously intended to delete. As time allows, providing visibility of new measures/offerings or hearing why existing unused measures are not accepted by the market would identify obstacles to implementation.
Roadmap	Eric Noller	11/28/2023	Goal 3, identify and engage with new entities - Examples would be nice to have as footnote	N	We have Cal TF presentations on this; we have identified the list in the past, but chose to remove the detail in this version since the list is fluid.
Roadmap	Eric Noller	11/28/2023	Goal 4, "other data sources" - For example?	N	Other data sources could include demographic characteristics, income, building stock, etc. to help better target measures.
Roadmap	Eric Noller	11/28/2023	Goal 5, evolving policy and practices... - This is perhaps the biggest one	N	Understood
Roadmap	Eric Noller	11/28/2023	Goal 5, consensus-based policy issues - can/will this involve policy change?	N	Cal TF will work with stakeholders including CPUC on proposals that make encourage policy change; only CPUC can make policy changes.
Roadmap	Eric Noller	11/28/2023	Goal 6 - Are some of the future TPP / WP topics identified yet?	Y	Specifying VEA is too detailed; we already have: "Coordinate, conduct, and organize all measure management and updates (ongoing)" that refers to facilitating Specific TPP and White Paper identified in 2024 Business Plan. We will solicit from Cal TF members additional topics, keep running list, and assess whether we can do additional White Papers/TPPs in 2024. PAC must approval all TPP topics.
Roadmap	Eric Noller	11/28/2023	Goal 7 - Goals - Could we also consider engagement with end user customers / rate payers?	Y	Added a goal. We could engage with ratepayers/customers on case-by-case rather than routine basis to get their input on select topics. Would be hard to engage with ratepayers/customers on a regular basis.