

eTRM Implementation Plan: Second Look



CALIFORNIA
TECHNICAL FORUM

ANNETTE BEITEL
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eTRM Implementation Plan: To Date



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- To date, eTRM implementation plan is described in three main documents
 - eTRM: Electronic Technical Reference Manual: Stakeholder Presentations Fall 2015/Spring 2016
 - eTRM “One-pager”
 - Technical Position Paper 2: Electronic TRM Proposal
- Consistent set of information to our broad community of stakeholders to build awareness, understanding, and support
- Cal TF has other documents describing specific aspects of the eTRM implementation plan, such as the technical “Threshold Issues” document

Purpose of Subcommittee

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- Cal TF participants have asked whether certain elements of implementation plan should be re-considered or developed in greater detail:
 - ❑ eTRM measure prioritization
 - ❑ Review process for measures for eTRM placement
 - ❑ Populating eTRM
- Roles and responsibilities
 - ❑ Who is doing what?

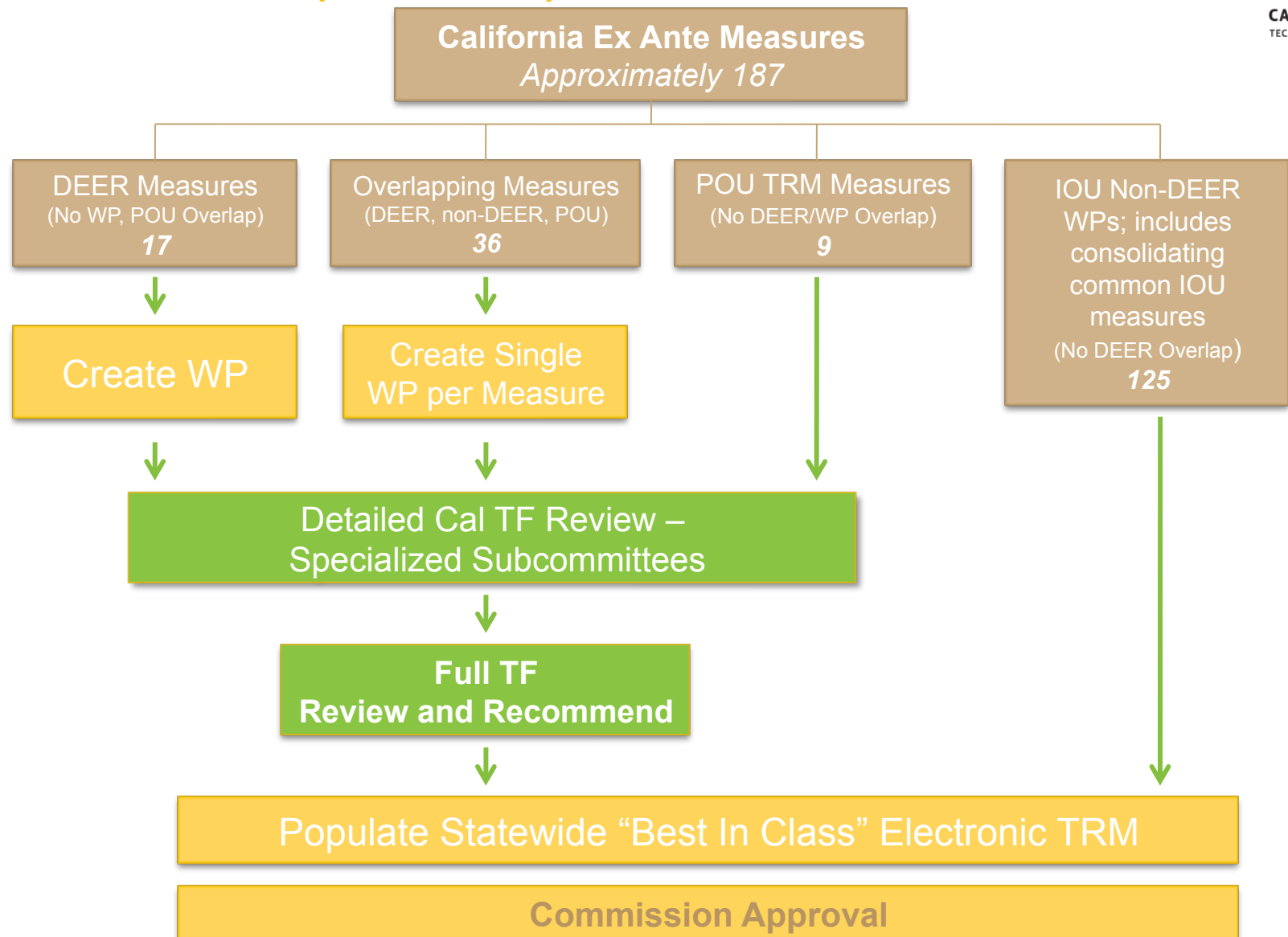
Cal TF Questions for Further Discussion



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- Prioritizing measures for review/placement into eTRM
 - ❑ Cal TF staff proposal (see chart on next slide)
 - ❑ Cal TF participant proposal – focus on HIMs
 - ❑ Other approaches?
- Approach for preparing each type of measure for placement into eTRM, which will vary depending on “type”
- Approach to populating eTRM
 - ❑ “Grandfather” certain measures after high-level review OR
 - ❑ Only populate measures which have been fully sanitized/reviewed
 - ✦ Cal TF Staff really wants this project completed in two years!!!!

Proposed Implementation Process



Prioritizing Measures

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- Cal TF Staff Proposal
 - Confirm active measures
 - ✦ Identify little used measures and perhaps remove from project
 - Identify and focus initial implementation on HIMs
 - 2016 Review
 - ✦ All POU TRM Measures (9 measures – Q2 2016)
 - ✦ Utility non-DEER WP (125 measures)
 - Develop checklist for systematic review of basic quality standards, relevance, flag date of necessary further review.
 - Cal TF staff does initial review then discusses in subcommittees grouped by subject matter expertise
 - Subcommittee decides whether can be used to populate eTRM as is or with slight modifications and “sunset date”
 - Minor adjustments to add climate zones, etc.

Prioritizing Measures

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- Cal TF Staff Proposal (continued)
 - 2016 Review (continued)
 - ✦ “Overlapping” Measures (36 Measures)
 - Identify which WP is starting point in case of overlapping
 - ✦ DEER Measures with no overlap (17 Measures)
 - Request that CPUC staff produce WPs for DEER measures consistent with standards that they hold others to
 - 2017 Development/Review
 - ✦ DEER Measures with no overlap (17 measures) if CPUC does not complete
 - EnergyPlus for modeled measures; consider approaches used in other TRMs
 - Review measures through Cal TF subcommittee process
 - ✦ Overlapping Measures (see above)
 - Review in subcommittee using checklist and referring to other TRMs
 - Does Cal TF staff proposal seem reasonable and balanced workload?
What changes to improve?

Prioritizing Measures

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- Cal TF Proposal: Focus on HIMs
 - ❑ HIMs for state or HIMs per utility territory?
 - ❑ What level of review? Approach to review?
 - ❑ What about non-HIMs? Do we exclude from project?
- Roles and Responsibilities
 - ❑ Identify parties (IOUs/IOU Consultants, Cal TF staff) for consistent review prior to subcommittee review OR have Cal TF staff do “ministerial review” and IOUs perform more “substantive” review

Approach to populating eTRM

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- Approach to populating eTRM
 - “Grandfather” certain measures after high-level review
 - ✦ We don’t want errors
 - ✦ But, we may not have time to update and build agreement around every method, assumption, value.
 - Create “sunset” date and track open issues in dBase for when the issues/measure has to be fully reviewed
 - Only populate measures which have been fully sanitized/reviewed
 - ✦ Cal TF Staff really wants this project completed in two years!!!!
 - **Happy Medium:**
 - ✦ Identify methods/data that most need to be updated and build consensus around those prior to populating eTRM
 - ✦ Other items get “sunset” date

Follow-Up Issues

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- What should be review criteria?
- What are biggest assumptions, methods, data, values that are incorrect and need to be altered?
- Cal TF staff needs to request HIMs from IOUs/POUs
 - ❑ Any items that would be HIMs if they were addressed in a more conventional manner, or have not been approved but should be?
- Identify “best” experts/firms (technical matrix) for new measure development or significant measure updating and group by end use