eTRM Update: Future Extensions

CALIFORNIA
TECHNICAL FORUM

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CAL TF MEETING
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eTRM: Deemed Starting Point
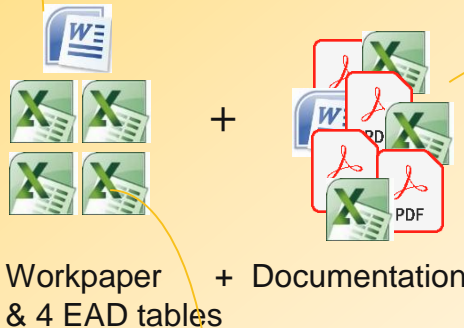
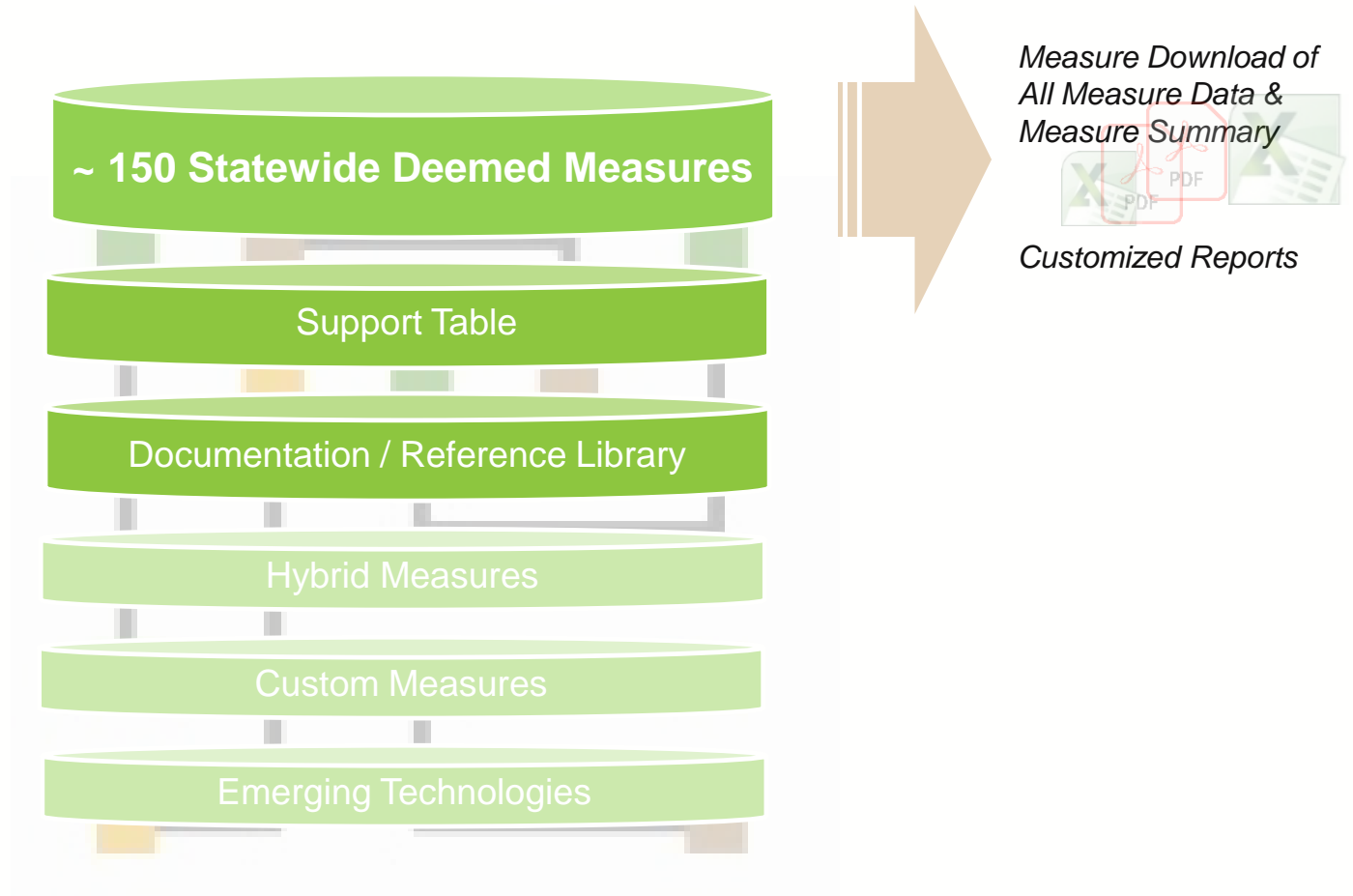Deeresources.net

SCG ~60

PG&E ~150

Each Utility Measure:

+

Workpaper & 4 EAD tables   +   Documentation

?

SCE ~150

SDG&E ~100

POU ~50

READI Remote Ex-Ante Database Interface

~ 150 Statewide Deemed Measures

Support Table

Documentation / Reference Library

Hybrid Measures

Custom Measures

Emerging Technologies

Measure Download of All Measure Data & Measure Summary

Customized Reports

eTRM: Custom Starting Point

Application   Approval   Installation

Custom Calc Guidebook

"Preferred" Calc Tools

Utility-specific Requirements

"Homegrown" Calc Spreadsheets

On-site Data

Updated Savings Calcs

Cost Documentation

Other Utility-specific Verification Requirements
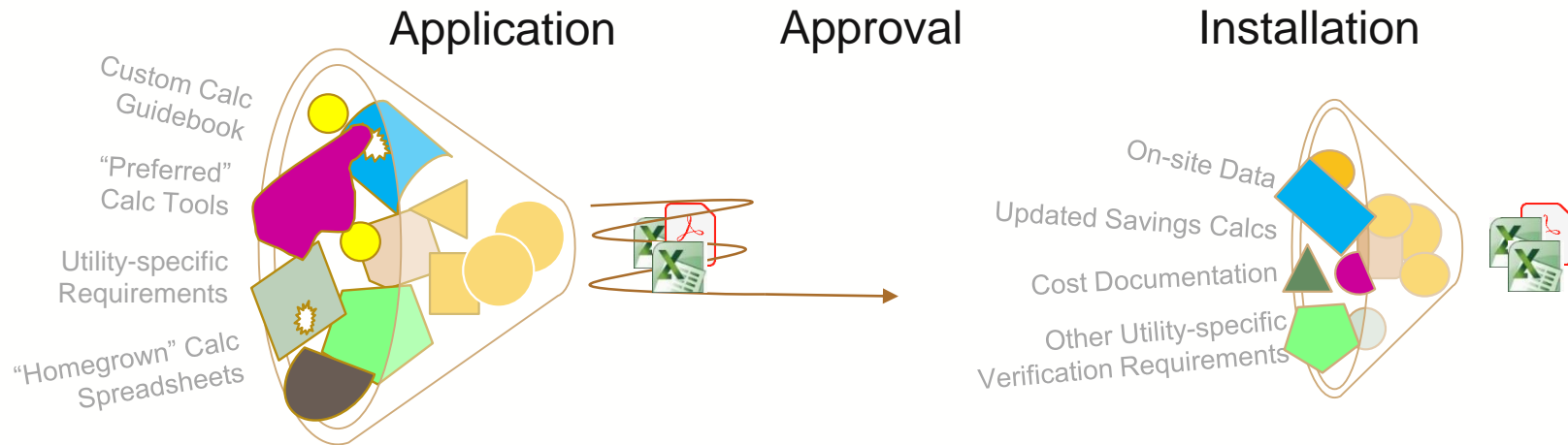
Pre-Installation Submittal

- Calculations performed with preferred tools or homegrown spreadsheets
- Lack of clarity for data collection requirements or if assumptions are acceptable
- Perception of missing pieces of information
- Rules and knowledge of precedence are onerous
- Screening and approval process requires iterations
- Duration from application submittal to approval is lengthy, costly and unpredictable
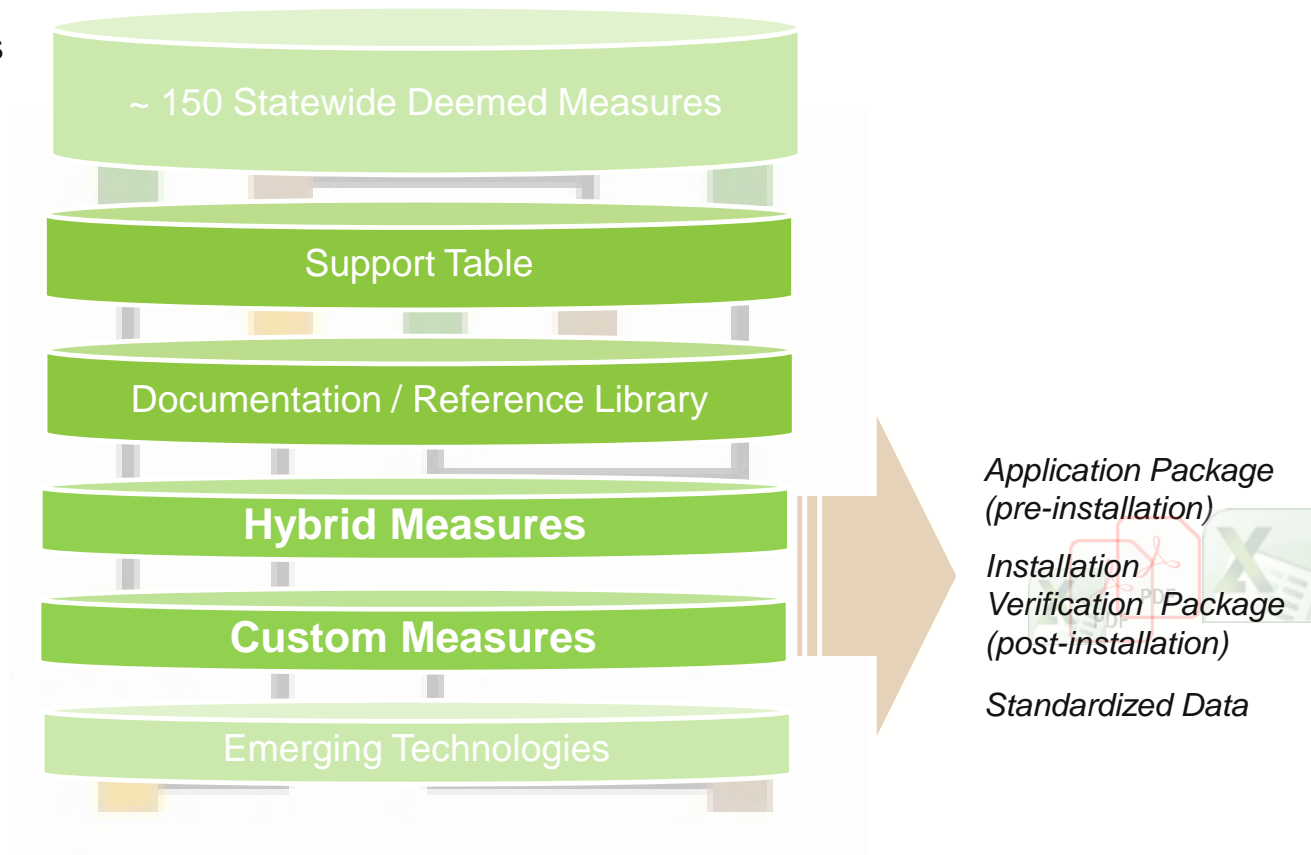
Post-Installation Submittal

- Must comply with installation requirements
- Savings analysis updated with varying levels of supporting documentation
- On-site data collection varies
- Cost documentation varies

2/7/2019

eTRM: Hybrid & Custom Future State

- Standardized application & installation reports
- Standardized calculations
  - Includes locked down parameters
- Guidelines on base case (additional data if existing conditions baseline)
- Guidelines on M&V requirements
- Organized and complete repository of regulatory requirements
  - ISP, ET, Baseline studies
  - Dispositions, etc
- Documentation requirements
  - Viability / operation
  - Influence
  - Project cost
  - Links to QPLs
- Documentation of workflow

~ 150 Statewide Deemed Measures

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Hybrid Measures

Custom Measures

Emerging Technologies

Application Package (pre-installation)

Installation Verification Package (post-installation)

Standardized Data

eTRM Can Tighten Linkage Between EM&V and Measures

Current State:
- Availability of EM&V results one or more years after implementation is problematic for updating deemed measures in timely, strategic, and proactive way.
- Lack of "real-time" EM&V – data collected and during program implementation to support refinement of measure values

Future State:
- eTRM tracks data needs to refine/update SW measures.
- Measure-specific data needs tracked in eTRM can be provided to and inform EM&V Roadmap. eTRM allows research needs to be identified proactively and aligned with EM&V Roadmap strategy.
- eTRM can identify and track data collected during program implementation to refine measures.
- eTRM tightens up linkage between SW measures and EM&V results

Conclusion: eTRM Platform

- eTRM Platform facilitates
  - Reduced measure development and review costs through standardization and automated QA/QC
  - Transparency – market will have access to data/information that was previously not available
  - Clear and standardized work flow
  - Enables market communication about changes to measures, rules, etc.
  - Automated connections with other market tools:
    - POU CET calculator
    - CEDARS/CET
    - IOU/POU tracking databases
    - Other? Trade ally calculators, project tracking, etc.