

# eTRM Work Plan



**ANNETTE BEITEL**  
**JANUARY 26, 2017**

# Overview

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- “Next Steps” Memo identifies need for Work Plan and Responses to “Critical Questions”
- Review to Date
- Key Elements
- Next Steps
- Cal TF Input Requested

# Directive: Next Steps Memo

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- *Once key questions are resolved, . . .[a] next step would be to finalize a detailed work plan that identifies and summarizes roles, responsibilities, budget, and timeline to develop the eTRM.*
  - Next Steps Memo, Cal TF and CPUC Staff memo to Dave Gamson dated August 16, 2016

# Work Plan: Review

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- **PAC:** Draft circulated/discussed with PAC
  - I will be circulating for formal review/approval after Cal TF input.
- **CPUC Staff:** Draft provided to/discussed with CPUC Staff
- **5<sup>th</sup> Floor:** Draft discussed with Dave Gamson (CPUC staff present)
  - Final will be provided to Dave Gamson once review/comment final (PAC) – February expected.
- **Cal TF Input:** Today! I'll be discussing key points, not circulating draft.
- **CEC:** ? Probably a good idea . . .

# Caveat

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The information presented in this deck is the proposed, not final, approach. It may change when work plan is finalized.

Cal TF input desired, in particular, on technical issues. Policy, administrative, funding issues will be made by others, including variously funders, PAC and CPUC staff.

# Critical Questions

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- ❑ Which entity will release the RFP to procure an eTRM? Would this be a short-term contract limited to eTRM development or a long-term contract that includes long-term maintenance and updating of the eTRM?
- ❑ How will development and maintenance of the eTRM be funded?
- ❑ What existing data and resources can be leveraged to limit redundant work and avoid “reinventing the wheel”?
- ❑ How exactly would the transition to the eTRM function? What existing information could be leveraged and what would need to be modified?
- ❑ How would the eTRM fit in with other existing CPUC savings estimation and claims processing tools and activities?
- ❑ What role does the CPUC’s energy efficiency proceeding (R.13-11-005) play in this process, if any?

# Short Responses

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- ❑ Which entity will release the RFP to procure an eTRM? Would this be a short-term contract limited to eTRM development or a long-term contract that includes long-term maintenance and updating of the eTRM?
  - ✦ Future Energy Enterprises, LLC will release RFP and hold contract (but not any ownership – TBD) – costs to be passed through.
  - ✦ Five year contract
- ❑ How will development and maintenance of the eTRM be funded?
  - ✦ IOUs (PG&E, SCE, SCG, SDG&E) and POUUs (SMUD, LADWP)

# Short Responses

- ❑ What existing data and resources can be leveraged to limit redundant work and avoid “reinventing the wheel”?
  - ✦ DEER methods, assumptions, data and requirements will be considered
    - However, must be clearly sourced, easily accessible, represent “best available information”
  - ✦ DEER Building Prototypes
    - Last year, two information requests to EAR Team asking for information to allow DEER Building Prototypes to be built in EnergyPlus.
    - Cal TF 2017 TPP will explore alternative approaches to building prototypes, start with CEC Building Prototypes?
  - ✦ Existing Measure Information – Measure consolidation
  - ✦ CPUC/CEC Policies and Requirements
    - These must be followed. Distinguish from “unwritten rules”
- ❑ How exactly would the transition to the eTRM function? What existing information could be leveraged and what would need to be modified?
  - ✦ Two phases, coordinated with Rolling Portfolio Cycle
  - ✦ Phase 1 eTRM (first 75 Measures) filed January 1, 2018 (or thereabouts)



# Short Responses

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- ❑ How would the eTRM fit in with other existing CPUC savings estimation and claims processing tools and activities?
  - ✦ Work needs to be done on this
  - ✦ Need to catalog all “savings estimation and claims processing tools and activities”
  - ✦ Also need to understand required data fields, format and organization – data transfers will be through flat files, not AMIs.
    - Need to make sure eTRM can talk to all databases and tools (what key questions should be asked?)
- ❑ What role does the CPUC’s energy efficiency proceeding (R.13-11-005) play in this process, if any?
  - ✦ Tier 2 Advice filing after Work Plan complete
  - ✦ Phase 1 eTRM filed early in 2018; will also seek changes to existing regulatory directives that need to be made for switch from DEER to eTRM.

# Work Plan: Roles and Responsibilities

- Cal TF Staff:
  - eTRM Repository: Oversee bidding, development, implementation.
  - Measure Consolidation: Manage process; lead for measure consolidation.
  - New Measure Development
    - ✦ 2017: Follow Existing Process
    - ✦ 2018: Via new eTRM Process
- TF
  - Measure Consolidation: Review/affirm consolidated measures through “expedited” process – 75 for 2017!
    - ✦ Much work to be done in subcommittees
  - Measure Review: ongoing

# Work Plan: Roles and Responsibilities

- Policy Advisory Committee
  - Review/approve Business Plan; monitor progress on goals
  - Review/comment on “non-technical” issues – Work Plan, Advice letter, regulatory filing. Ideally I will seek consensus.
- Funders (subset of PAC)
  - Review/approve eTRM RFP and successful bidder selection
  - Review/comment on resulting eTRM repository contract
  - Up-front engagement prior to starting measure review, then active on measure consolidation subcommittees
    - ✦ Special role for statewide measure leads – Subcommittee champions? Will also look to POU’s for co-champions.

# Work Plan: Roles

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- Regulatory Staff (CEC/CPUC)
  - Review/comment on eTRM RFP
  - Bid Selection subcommittee
  - 2017: Input on overall process; engage as they are able
  - 2018: Detailed technical input (once new technical consultant in place)
- CPUC
  - Approval of eTRM and any changes to regulatory policy/directives needed to make eTRM effective
- CEC
  - Keep informed/supportive

# Work Plan: Roles

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- Leveraging capabilities in other organizations
  - US DOE – EnergyPlus
  - NREL – EnergyPlus
  - LBNL – Energy modeling
  - NW RTF – Continued support as questions arise, ad hoc
  - Trade Organizations - Particularly for subcommittees, specialized expertise, such as
    - ✦ ASHRAE
    - ✦ IBIPSA
    - ✦ Davis Lighting Center
    - ✦ Design Lights Consortium
  - **Cal TF Input:** Which other organizations should we reach out to?

# Budget

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- Approximately \$1.8 million/per annum, for two years
  - ❑ Includes cost of eTRM repository licensing or development (forecast value)
  - ❑ Labor for measure consolidation (bulk of budget)
  - ❑ Cal TF administration and costs for other Cal TF work (TPPs, new measure review, etc)
  - ❑ Includes limited new measure review
- Does NOT include
  - ❑ Building CA building prototypes in EnergyPlus/Open Studio
    - ✦ Hopefully we can leverage what CEC has already developed
  - ❑ Analysis Controller
    - ✦ Piece of software that lets eTRM Repository talk to EnergyPlus/Open Studio
- **Goal: 2019 – Beyond** – does not exceed \$1.8 million/per annum
  - ❑ Roughly NW RTF annual budget
  - ❑ Includes ALL new measure review
  - ❑ Repository maintenance, upgrades, possibly licensing fees

# Timeline: 2017 Key Dates

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Draft Plan for Measure Consolidation Strategic Plan	February Cal TF Meeting
Final Plan for Measure Consolidation	Fifteen (15) Business Days after soliciting input from all IOUs and CPUC Staff.
Consolidate at least seventy-five (75) measures <ul style="list-style-type: none"> <li>• First ten measures (July 31, 2017)\</li> <li>• At least ten measures monthly thereafter, with total of 75 by Decemeber.</li> </ul>	December 2017
Release RFP:	February 20, 2017
Manage Bid Evaluation Process, leading to selected eTRM provider (assuming successful K negotiations):	Completed by May 15, 2017
Complete Contract Negotiations	July 1, 2017
Draft Governance Document for eTRM	October 1, 2017
Complete eTRM Repository Development or Customization	November 1, 2017
Final Governance Document for eTRM	Ten (10) Business Days after soliciting input from IOUs and CPUC Staff
Complete entry of test measures working with eTRM Provider	December 15, 2017